Synthesising Northern Territory Population Research: A report to the Northern Territory Department of the Chief Minister

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Executive Summary

In September 2017, the Northern Territory Department of the Chief Minister contracted the Demography and Growth Planning research team at Charles Darwin University to synthesise twelve years of research on the causes and consequences of population change in the Territory and advise on strategies for stimulating population growth (the Terms of Reference are in Appendix 1). Each of the eight chapters in this report commences with a short summary of the chapter’s purpose, its core messages and recommended actions.

The Territory is now eight years into a low population growth ‘era’ featuring a deterioration in interstate migration, and particularly the ‘failure to arrive’ of large numbers of people in what previously were key migrant groups. There have been two similar eras of nine and seven years’ duration in the past 35 years, and our international research shows most ‘northern’ regions in developed countries have had similar experiences. Low growth eras are linked to slowdowns in both international and domestic migration. For the Territory, there have been reductions in arrivals from South Australia, New South Wales and Victoria, and slowdowns in migration from Great Britain and South Africa. In addition to declining source markets, the Territory has become less attractive as a migration destination for people at particular life stages (such as women in the early stages of their careers), and has increasing difficulty in retaining people at other life stage transition points (such as retirement from full time work).

Although the Territory is in a low growth era, differences between current growth rates and the long term Territory average are relatively small. In person numbers, a return to the thirty-year average annual growth rate requires only a net improvement of around 2,600 people (about 1% of the total population). Additionally, overseas born communities in the Territory are growing quite rapidly, including the Filipino, Indian, New Zealand and Nepalese communities.

While there are many factors influencing migration to and from the Territory, ‘work’ is the prime reason migrants from all sources both come and go. Family and social issues influence out-migration to a greater extent than they influence in-migration. The likelihood of leaving the Territory in any given year decreases substantially once people have been here for five years. After that time, out-migration is influenced by life stage specific motivations such as worries about cost of living for people retiring from work.

Australian and international experience suggests that there is no single ‘silver bullet’ strategy for fostering high population growth in places like the Northern Territory. Rather, we recommend a suite of Market Orientated Population Initiatives (MOPI) that can help change migration behaviours of specific population groups. We suggest the most promising markets and strategies are:

- International migrants, with a focus on countries which are providing increasing numbers of migrants to the Territory in recent years;
- Territory ‘alumni’ (past residents) who might return themselves (one third of people leaving the Territory intend to return) and might be ambassadors for the Territory, promoting it as a destination for friends and colleagues;
- Late career workers and those retiring from full time work, particularly those who arrived in the late 1970s and early 1980s after Cyclone Tracy and Self-Administration; and
- Women in the early stages of their careers.

There are other markets which might also be influenced (lifestyle migrants, seasonal and temporary workers making the Territory their home base), but with lower likely returns on investment.

Over the page are the priority actions in relation to the more promising markets (Chapter 6). In addition to MOPI actions, there is a need to improve official population counts by, for example, encouraging new residents to update Medicare details in a timely manner. New research is also needed to inform MOPI actions and to identify new target markets as they emerge (Chapter 8). This research is particularly important given a number of global and generational trends that are likely to impact places like the Territory in coming years (Chapter 7).

‘Single number’ population growth targets (for example, to reach a population of 300,000 by 2020) tend to serve less effectively as a guide to population growth strategies than relative targets which apply to specific markets (for example, to achieve net positive in-migration of early career workers) for reasons explained in Chapter 5. We recommend that targets of this sort be set for each of the promising markets identified above.
Priorities

The research has revealed a number of priorities action items for addressing population growth challenges in the Territory. From these the Northern Territory Government should work with business and community groups to develop specific strategies for:

- Attracting early career women;
- Attracting, and particularly retaining people moving into mid and late career to broaden the population base;
- Identifying Territory ‘alumni’ and attracting them to return to the Territory or promote the Territory to friends and colleagues;
- Implementing strategies to attract migrants from specific international source markets based on research into the factors that encourage them to move to and stay in the Territory;
- Promoting Territory regions to provide a variety of ‘ways of living’ in the Territory;
- Making the Territory more ‘retiree friendly’; and
- Implementing promotions and programs encouraging new arrivals to update their address with Medicare and in other administrative databases.
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Acknowledgements

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1 Understanding recent Northern Territory population trends

Purpose of this Chapter:
To provide important context on the Territory’s current population situation and introduce the key concepts of population ‘eras’, migration ‘markets’, ‘life stages’ and Market Oriented Population Initiatives (MOPI).

Core Messages:
• The Territory is currently in a low growth population ‘era’ which began in 2010 and features:
  o A long period (26 consecutive quarters) of net negative interstate migration (NIM).
  o Lower proportions of interstate migrants from key sources (notably SA, NSW and Vic) coming to the NT.
  o Increased seasonal volatility for both interstate and overseas migration.
  o Reduced contributions to population growth from net overseas migration (NOM).
  o Uneven growth within the Territory with Darwin growing and the remainder not.
  o Large declines in our biggest in-migration ‘market’ of early career workers, particularly women.
  o Dramatic decline in children and teenagers migrating to the NT (again linked largely to changing migration patterns of women).
  o Increased ‘departures’ of key markets like early career workers, those nearing retirement and those who have recently retired.

• This is the third low growth era since the 1980s. Recovery from past eras (1986-1994 and 1998-2004) coincided with lower housing costs and higher employment rates in other parts of Australia, and favourable overseas migration policy settings.

• While negative NIM is not unusual, the size of the current deficit is of concern. We suggest this has been driven by changes to people’s migration behaviours based around transitions from one ‘life stage’ to another.

• Nevertheless, the number of people needed to return the Territory to its long term growth rate is relatively small (about 2 600 in 2017).

• Some markets are growing, particularly overseas migrants from the Philippines, India, New Zealand, and Nepal. Refugee stream and Pacific Labour Migrants could also be important markets in the future.

Key Action Items:
1. Addressing the Territory’s population challenges will require a series of Market Oriented Population Initiatives (MOPI) rather than a single ‘silver bullet’ solution, and requires ‘sign on’ from governments at all levels, Territory businesses and the community
2. The Territory needs specific strategies to attract and retain women and those transitioning to middle and late career stages
3. The Territory should focus international migration efforts on source countries with strong growth potential and should invest in attracting refugee stream and Pacific Labour migrants
4. The Territory needs to promote its regions as well as Darwin to offer a wide variety of ‘ways of living’ for new migrants
5. Strategies which make the Territory more ‘retiree friendly’ are urgently needed
6. There may be opportunities to improve population figures by encouraging new arrivals to the Territory to update their Medicare address details in a more timely manner.
1.1 Introduction

The aim of this chapter is to provide context around the current low population growth ‘era’ in the Northern Territory. A core consideration is whether the present era is similar to past low growth eras, and if so, what might trigger a return to higher growth rates. The chapter commences by looking at data which explains the current trends before examining cyclical forces. We then pick apart our research on the characteristics of population eras and long term trends in the flows of migrants to and from the Territory. Subsequently we analyse population projections to ascertain the scale of turnaround needed to take the Territory from its current growth rates to the 30-year long term annual average of around 1.5%. Collectively, this chapter provides important clues to the types of ‘markets’ and initiatives which might help stimulate higher population growth in the Territory.

1.2 Recent Territory population trends

In the past decade, Northern Territory population growth has fluctuated greatly compared to the national growth rate. Figure 1 shows comparisons of quarterly population change (%) for the Northern Territory and Australia over the past decade. Growth in the Northern Territory was above the national rate for 19 out of 40 quarters in the decade. However, during the past four years Northern Territory growth has generally been well below the national rate and this has created a decline in the Northern Territory’s share of the national population.

**Figure 1 – Quarterly population growth rates for the Northern Territory and Australia, 2007 to 2017**

Source: Authors calculations from 3101.0 - Australian Demographic Statistics, March 2017

Low growth since 2013 has been driven by persistent negative net interstate migration (NIM), with 29 consecutive negative quarters stretching back to the December quarter of 2009. While the Territory’s long term quarterly average for NIM over the past 30 years is also negative at -269 people, since 2013 NIM has fallen well below the long term average (the dashed line in Figure 2).

Also of note are recent deteriorations in the net overseas migration (NOM) position since late 2013. This includes a decline in the absolute numbers of migrant arrivals and high seasonal volatility in the net figures year-on-year which has seen the net position (the orange line in Figure 2) at either well above or well below the 30 year positive average for net overseas migration of 267 people per quarter (the dashed orange line). Meanwhile, natural increase (the excess of births over deaths) remained very stable during the ten years to March 2017 and remains the main contributor to Territory growth. It has averaged 706 per quarter in the past 30 years and has been close to long term average levels even in recent years when the Territory’s interstate and overseas migration positions have worsened.
Figure 2 – Recent Northern Territory population trends

Source: Authors calculations from 3101.0 - Australian Demographic Statistics, March 2017

Seasonal trends in NIM are also clearly evident in Figure 2, with increasingly large downturns during the December quarters (the months of October, November and December) in the past ten years. For example, the net position in the December quarter of 2016 was around 500 worse than for the June quarter of that year, and 100 or 200 worse than for even the worst previous December quarters.

Periods of persisting large net negative NIM outcomes with accompanying low or negative population growth have been experienced twice before in the Territory during the past 35 years. Emphasised in red in Figure 3, these were from 1986 to 1995 (9 years duration) and 1998 to 2004 (7 years). In the most recent years of the present period (2014 onwards), the absolute size of net losses have exceeded all prior records, and suggests a trend of ‘deeper lows’ in negative NIM. In contrast, positive NIM eras (the blue bars in Figure 3) have been much shorter in duration than negative eras, and appear to have increasingly low ‘peaks’. Nevertheless, relatively good overall population growth has been recorded even after positive NIM eras have ended (for example, from 1998 to 2000 and from 2012 to 2013), indicating the importance of net overseas migration (see Section 1.3).

Figure 3 – Long term data on Territory net interstate migration ‘eras’ and population growth

Source: Authors calculations from 3101.0 - Australian Demographic Statistics, March 2016 and 3105.0.65.001 Australian Historical Population Statistics, 2014
The existence of eras in interstate migration provides a sense that, aside from obvious seasonal cycles, longer term cyclical dynamics may be determining the Territory’s population trends. Specifically long periods (seven to nine years) of low growth as a result of negative interstate migration followed by shorter periods (three to five years) of positive interstate migration accompanied by good growth rates seem apparent. In that respect, the Territory might be seen as being ‘due’ for a cyclical upturn as occurred in 1995 and 2006.

However, ascertaining cyclical effects and the likelihood of a cyclical upswing is a highly complex task, not least requiring the identification of and detailed information about:

- Local social and economic factors which may be associated with upswings and downturns in net interstate migration;
- How global trends in society, technology, the environment and geo-politics might be altering migration to and from the Territory (Chapter 7); and
- The extent to which changes to and issues within the national statistical system (which provides official population estimates at national, Territory and sub-Territory levels) may be impacting on the observed population trends.

Highlighting the complexities, in Chapters Two and Three we note that no other Australian or international jurisdictions have been able to conclusively link their population related policies or initiatives to upswings or downturns in population growth rates. Our previous research has explored some of the economic and social factors associated with transitions from positive to negative NIM eras and vice versa in the Territory. The main findings included:

- Lower housing costs in Sydney and Australian capital cities as a whole are associated with positive net interstate migration to the Territory. Lower housing costs outside of the Territory may make it easier for migrants to ‘take the risk’ of moving here, confident they can re-enter the housing market if the move to the Territory turns out to be short term;
- Falling youth unemployment and increasing job availability in many states, especially the ‘peripheral’ states of Queensland, Western Australia and Tasmania, are linked to positive Territory net interstate migration. This suggests the presence of a national ‘peripheral migration system’ of which the Territory is part;
- The Territory tends to have positive NIM when its employment conditions are similarly strong to those in other peripheral states, suggesting some people might be enticed to migrate to peripheral areas when they perceive there is a relatively low risk attached to leaving employment or the jobs market elsewhere. People may be engaging with ‘peripheral’ areas in general, rather than specifically looking for opportunities in the Territory;
- Relatively high cost of living in Australia may make people more likely to consider a move to, or to stay in, the Territory because the Territory is then not so ‘disadvantaged’ by its generally higher cost of living; and
- Economic conditions within the Territory appear to have limited impact on net interstate migration, with higher housing costs and higher unemployment actually linked to positive NIM.

These findings suggest housing and economic conditions outside of the Territory may play a more central role in interstate migration than conditions within the Territory. In particular, there appears to be consideration of the ‘risks’ of migration in relation to current and future capacity to enter or re-enter the housing and jobs markets outside of the Territory.
Our research has also revealed that the current negative NIM and low population growth era is different to previous such eras for a number of reasons:

- An increasingly volatile environment for interstate migration has emerged in the Territory over the past two decades, with periods of out-migration becoming more pronounced;
- Victoria and, to a lesser extent, New South Wales have been consistent sources of positive net migration since the 1970s, but in the past decade, their contribution has declined. This follows a similar path observed with South Australia and Western Australia. In 1987 the Territory received 11% of all of South Australia’s out-migrants and nearly 10% of those from Western Australia. By 2014, Territory received less than 7% of the migrants from these States;
- Changing economic and labour market conditions may be reflected in the relative NIM performance of different parts of the NT, with remote regions being particularly vulnerable, and migration flows increasingly focused on Darwin;
- The ‘key target’, and by far largest absolute incoming and departing age group of 15-29 year olds has trended towards lower positive (and even negative) NIM since the 1980s, and no other age group has compensated for this decline (see Section 1.5); and
- There has been a notable ‘gendering’ of NIM since the 1980s and the Territory continues to have high proportions of male in-migrants, while nationally women are making up a larger percentage of the flow of interstate migrants.

The current negative era is therefore different to previous ones due to the magnitude of negative interstate migration and because few of the signals of a change towards positive interstate migration can be observed. This might be a result of the cumulative erosion in the competitiveness of the Northern Territory in the interstate migration ‘market’ over time, particularly for attracting women, and particularly as a destination for South Australian and (more recently) Victorian out-migrants. However, interstate migration flows in Australia are larger than ever and growing, especially for women. There may be opportunities for the Territory to tap into new interstate markets as traditionally dominant markets continue to decline.

1.3 The importance of international migrants and their communities

As the Territory’s NIM positioned has declined, overseas migration (which is traditionally net positive) has grown in importance. Overseas migrants have long played a prominent role in population growth (and loss minimisation) for the Northern Territory and places like it. Literature suggest that places like the Territory (with Alaska being a prime example) are poor at retaining overseas migrants, especially after visa requirements are met and permanent residency is granted. This ‘stepping stone’ migration no doubt continues to account for the leakage of some international migrants from the Northern Territory. However, our past research into the migration intentions of skilled migrants to the Territory, as well as our identification and tracking of several ‘new migrant communities’ in long term Census data suggest overseas born migrants and their descendants have the potential to significantly influence Territory population growth in spite of inevitable leakages to major southern cities. For example, the Indian community in Alice Springs ‘sprung up’ during 2006 to 2011 from active recruiting for skilled job vacancies in the health sector. The community has continued to grow (by around 60%) from 2011 to 2016. Likewise, in Darwin the Indian community doubled in size in the five years to 2016. This sustained growth, while small in the context of southern regions, is notable and indicates potential future growth through ‘chain migration’ (especially family migration). Other benefits from the communities may accrue such as tourism as a result of visiting friends and relatives, growing cultural and retail diversity, increasing numbers of school and university students, and new births from higher fertility rates common to many of these migrant groups.

Strategies to encourage continued or larger international migrant numbers to move to the Territory should target communities with pre-existing relatively large numbers and which are growing. Large and growing communities are
likely more attractive for potential migrants because of pre-existing social and cultural networks, as well as infrastructure (for example places of worship). Data in Table 1 identifies the growing migrant communities for Darwin and the rest of the Territory separately. The largest in Darwin, and with strong growth during 2011 to 2016, was the Filipino community, numbering around 5,000 in 2016 and having grown by 72% since 2011. The Nepalese community has also emerged in Darwin during the past five years and grown rapidly.

The largest community in the rest of the Territory in 2016 were from New Zealand with moderate growth (21%) since 2011. Both the Filipino and Indian communities in the rest of the Territory are growing quite rapidly and were relatively large as the third and fourth ranked in absolute size by 2016. Traditional source countries including England the United States of America, as well as most European nations, are stagnating or declining. The Chinese community is growing but from a very small base and is likely to concentrate in Darwin into the future.

Table 1 – Migrant communities in Darwin and rest of the NT: Size and growth

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<td>China (excludes SARs and Taiwan)</td>
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<td>34%</td>
<td>6</td>
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<td>92%</td>
<td>10</td>
<td>Vietnam</td>
<td>66</td>
<td>67%</td>
</tr>
</tbody>
</table>

Source: Author’s calculation from ABS Census data for 2006 and 2011 extracted using Table Builder

As well as focusing on the growth communities, an opportunity exists to attract more international refugees under the three Australian Government Humanitarian visa programs (https://goo.gl/7fXTSo). In 2015-16 a combined 17,555 visas were granted nationally with most migrants coming from Iraq and Syria. There may be scope to lobby the Australian Government to encourage more humanitarian settlements in the Territory, a strategy which we report was evident in Tasmania in the mid-2000 (Chapter 3) and in similarity to the Swedish local government system of ‘bidding’ for annual quotas which has assisted growth in some counties in the north (Chapter 2).

While growing our migrant intake is important, research on retaining international migrants in regional and remote areas is fairly consistent in pointing out the importance of the initial settling in period. Housing affordability and perceptions about safety are key factors in retention. For those who arrive to work in skilled jobs (now the vast majority), a match between the skills and qualifications of the visa holder and the actual job are important. These issues point to possible initiatives which might be considered such as welcoming programs (perhaps with ambassadors from the source countries), support for cultural activities and continued work on providing affordable housing and improving perceived safety. Many communities have Facebook and other social media pages which might be used to both encourage new migrants to stay, and to attract migrants who have left the Territory to return.
1.4 Trends in Territory regions

Population growth within the Territory has varied greatly between its regions during the current era. Growth in Darwin City and its suburbs, Litchfield and Palmerston (and until 2013 Daly-Tiwi-West Arnhem) has been markedly higher than for elsewhere in the Territory. Indeed, average annual growth for Darwin city and its suburbs from 2006 to 2016 was 1.8%, the same as the national average (although from 2009 to 2016 Darwin grew by 1.3% while national growth was 1.7%).

Figure 4 shows an index of growth for Territory regions with 2006 as the base year of 100. Litchfield and Palmerston have essentially increased in size by a half of their original 2006 population since that year. Such growth has not been evident in the Territory’s southern and remote regions with Alice Springs town and the surrounding region, Barkly and East Arnhem (subsequent to the closure of the alumina refinery at Nhulunbuy at least) stagnant or lower than the base year by 2016. As a result, the proportion of the Territory’s population residing in the Greater Darwin region was 60% in 2016, up from 52% ten years prior.

Figure 4 – Indexed population growth in Territory regions (2006 is the base year of 100)

Source: ABS, 3218.0, Regional Population Growth, Australia
Note: Estimates for 2012 onwards are preliminary and may be altered by the ABS towards the end of 2017

For some regions, including Alice Springs town, Barkly and East Arnhem, population stagnation or decline coincided with the end of the ‘mining boom’ (around 2013) which may suggest that the next boom will lift their population and economic fortunes. There are a number of issues to consider on the question of resource led booms ‘saving’ Territory regions in the future. Firstly, we do not know when the next resource boom might arrive or whether a boom of the size experienced in this Century will ever be repeated. Secondly, for Alice Springs and Barkly, the boom appears to have provided relatively low growth anyway, while the end of the boom more than offset additions during boom years. In Chapter 7 we have incorporated a much more detailed précis on global factors affecting traditional development strategies in ‘remote’ regions (with a focus on resource extractive industries).
The broad summary is that resource led development is becoming less likely to support population and economic growth because of changing labour practices, technological change and a range of other factors.

The job of Government in distributing population and economic growth across regions is therefore very difficult and likely to rely on concerted strategies supported by governments of all levels, business and communities. On this, it is worth mentioning a recently released Productivity Commission report titled “How resilient are Australia’s regional economies to the end of the mining boom?” The report identifies remote regions in Australia as being the least adaptive to the end of the mining boom and highlights:

Developing and implementing policies to support people in regional communities is a complex task for governments, and properly evaluated success is rare. There is no easy solution or 'one size fits all' approach that will facilitate transitioning and adaptive economies in all regions of Australia.


The best strategies are suggested to be those which remove investment and relocation barriers (to bring in new businesses and entrepreneurship), are led by communities themselves, which connect with other regions and which draw on the inherent strengths of individual regions and communities. While non-specific, these emphasise that success (resilience, growth and development) for remote regions are likely to come from micro-level strategies aimed at incremental improvements over the long term, and which build on local contexts and the hopes of communities for the future. This aligns well with the overall strategy we propose in this report which is to incrementally improve the Territory’s population situation by a suite of targeted initiatives strategically aimed at particular population ‘markets’ (some of which may be quite small), rather than grand initiatives for inducing a (hopeful) quick turn-around in population fortunes. While it is likely that population growth outside of Darwin will continue to be lower than for Darwin, the Territory’s regions will play a key role in supporting overall growth by providing a wider variety of opportunities for lifestyles, jobs and careers than can be found just in Darwin.

1.5 Migration trends for Territory life stage ‘segments’

The Territory has always had distinctive age related patterns of interstate migration, with relatively high numbers of young adults moving to the Territory, and relatively high numbers of adults in their late 30s and 40s moving away. In more recent times, the younger age in-migration ‘spike’ has reduced somewhat, and there has been a small but important increase for in-migration of people in their late fifties and early sixties. These age related trends correlate very strongly to particular life stages based around jobs/careers and family formation. Young adult in-migrants have tended to be single and at the start of their careers (known internationally as ‘escalator migrants’ who are trying to advance their careers rapidly), while slightly older out-migrants are looking to begin or have just begun their own families. Older people come to the Territory for short periods of work at the end of their working lives, and leave on retirement. Different strategies might be used to encourage more in-migration and less out-migration of people at these life stages. We have conducted time series analysis on twenty years of interstate migration data and organised results into some broad life stages. The results are summarised in Table 2 below. The detailed charts for interstate arrivals and departures by gender and life stage are provided in Appendix 3.

It is first important to note that the proportional distribution of interstate inflows and outflows of Territory residents are dominated by early career workers (Figure 5). These accounted for 54% of all inflows and 48% of outflows to and from the Territory in 2015-16. The next largest flows are for children under 15 years of age (around 20% of in and outflows) followed by mid-career ages (around 15%).
The most notable recent trends have been a one third increase in male departures in the large early career group, while male arrivals have stayed roughly consistent since 2004-05. This is in contrast to the previous low growth era (1998-2004), when male arrivals fell substantially. Female early career arrivals have fallen in the current era, but this has been almost matched by falls in departures.

A striking decline in arrivals of children of around 50% is evident for both males and females, and accompanied by a 50% decline in teenage arrivals (see Appendix 3). This may be a mirroring of the general trend in Australia, noted particularly for rural Australia, of parents positioning their children for the final years of education at ever younger ages. However, the big drop-off in arrivals for children and teens may have also been influenced by the failure of parents to change their own Medicare registration address when they move to the Territory and/or to accurately link all children and teens to their records. Medicare address data are one of the primary sources of administrative data for official population estimates. Our Territory Mobility Study (see Chapter 4 on reasons people come and go) identified that 32% of Territory residents aged 18 and over who arrived in Territory in 2006 were registered for Medicare outside of the Territory (and therefore would be counted in the population of the State/Territory where their Medicare address was located) and 24% of those who arrived in 2005 were registered outside the Territory. For those who arrived in earlier years (back to 2001) nearly all were registered in the NT. The charts in appendix 3 also show a large and steadily increasing number of departures for late career and senior Territorians, but these are from a small base and at least in part due to more residents entering these stages of life. Nevertheless, any improvements to the retention over these stages will have beneficial (and perhaps ‘multiplier’) effects overall.

Source: Author’s calculations from 3101.0 – Australian Demographic Statistics, June 2016
Table 2 – Interstate migration data from 1996-97 to 2015-16: Main trends in life stages

<table>
<thead>
<tr>
<th>Life stage</th>
<th>Main trends</th>
<th>Possible causes and opportunities</th>
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<tbody>
<tr>
<td>Children 0-14yrs</td>
<td>• 50% decline in arrivals for males and females</td>
<td>• Indicative of the decline in arrivals of early career females (mothers) but may indicate some ‘data effects’ (especially Medicare address details) warranting attention</td>
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<td>• Departures stable</td>
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<td>Teens 15-19yrs</td>
<td>• 50% decline in arrivals for males and females</td>
<td>• Only group where arrivals and departures have fallen by similar proportions</td>
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<tr>
<td>Early career 20-39yrs</td>
<td>• One third decline in female arrivals and departures</td>
<td>• By far the largest group for gross flows warranting most attention</td>
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<tr>
<td></td>
<td>• One third increase in male departures</td>
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<tr>
<td>Mid-career 40-54yrs</td>
<td>• Arrivals and departures relatively consistent</td>
<td>• May be targets for strategies to retain males</td>
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<td></td>
<td>• Long term increase in male departures and decrease in female arrivals</td>
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<tr>
<td>Late career 55-65yrs</td>
<td>• Doubling of both arrivals and departures for males and females</td>
<td>• Partly related to age shifting in the Territory population</td>
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<td>• Doubling of arrivals positive sign of competitiveness</td>
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<td>• May be scope to ‘skim’ more numbers from dual residence people (encourage ‘declare NT’)</td>
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<tr>
<td>Seniors (65+ yrs)</td>
<td>• 75% increase in male and female departures</td>
<td>• Population ageing effects. Scope for retention</td>
</tr>
</tbody>
</table>

Source: Author’s calculations from ABS.stat - Interstate migration: Arrivals, departures and net, State/territory, Age and sex - Financial years, 1996-97 onwards

These trends for migration flows are broadly similar to those observed for other international regions which might be considered as similar to the Northern Territory (more detail about these regions are in the following chapter) during eras of low population growth. Across all of these, the main feature for migration flows has been the ‘failure’ to in-migrate of young adults (aged in their 20s and early 30s), particularly young adult females.

The analysis in this section therefore points to some markets which might be considered for targeted initiatives. Encouraging early career workers to stay through their mid-career life stage is possibly the most notable area for consideration. Other initiatives include improving the official population flows data by investigating the extent to which Territory parents (in particular) that arrive to the Territory update their Medicare details by listing children and changing their address. To our knowledge there has not been a thorough investigation of Medicare data for the Territory in recent years (it is difficult to obtain the data from the relevant department). Another consideration around measured data is dual residents (those who reside in the Territory for part of the year) who might be encouraged to declare the Territory as their place of usual residence (on Census forms, on administrative data, such as Centrelink, and with Medicare). The size of potential improvements to arrivals data from these two proposed data initiatives are unknown but are worth investigating further.

1.6 Making a difference: How much change is needed for a turnaround?

A minimum target for population growth in the Territory may be to achieve the average growth rate for the past thirty years (about 1.5% per annum). Figure 6 shows that net overseas migration, while lower in the past four years than in 2012-13, has been close to the long term average, while net interstate migration has fallen dramatically below the long term average. The ‘worst’ year has been 2016-17, when the combination of overseas and interstate
migration flows resulted in 2,600 fewer people in the Territory than would have been the case had we performed according to the long term averages. This represents about 1% of the Territory’s total population.

Figure 6 – The difference between recent net overseas and interstate migration data and their 30 year averages

Source: Author’s calculations from ABS, Australian Demographic Statistics, March 2017

1.7 Summary

In this chapter we have outlined key concepts for understanding Territory population trends with a focus on explaining the drivers of the current era of low population growth. Drivers include ongoing poor performances for net interstate migration and a slowdown in net overseas migration. Analysis of interstate migration flows for life stages shows a one third reduction in the arrivals of early career females, who comprise nearly 60% of all Territory female arrivals. Unfortunately, when we compare characteristics of the current era to past eras there is little to suggest a cyclical turnaround is impending because the correlates associated with past turnarounds (stable or falling house prices and low youth unemployment in major southern cities) are currently not in the Territory’s favour. In spite of this, our comparisons of recent years to long term data for interstate and overseas migration provide perspective on the relatively low numbers required for a return at least to long term growth averages.

On that basis we propose that a suite of Market Orientated Population Initiatives (MOPI) are likely the best way forward as a strategy for transitioning towards higher growth. These would consist of a series of targeted initiatives and actions to improve migration attraction and retention particularly focused on life stages and geographic source markets. Such a suite of initiatives is likely to have a positive cumulative influence on migration decisions for key markets. We also identified some data related initiatives which might be pursued, particularly in ensuring that Territory residents are recorded as such in administrative data sets. Finally, our regional growth analysis suggests policy makers will need to consider how to improve growth where it is at its lowest – in the more remote and central parts of the Territory; and noting that this is by no means an easy task including conveying some facets of ‘best practice’ strategy as proposed by the Productivity Commission in 2017 report on the adaptive capacity of regions in Australia after the end of the mining boom.
2 Population trends and growth for international jurisdictions

Purpose of this Chapter:
To outline population trends and growth strategies for sixteen international jurisdictions considered relevant to understanding the Territory’s population and developing appropriate population strategies.

Core Messages:
- All but Norrbotten (Sweden) and Troms (Norway) experienced long periods of slow population growth since the turn of this Century. Lappland (Finland) has had consistent population decline for the past 30 years. Recent low population growth in the remaining 13 regions can be attributed to lower in-migration, and often of young adult women. This is similar to what has occurred in the NT.
- Most places include population growth ambitions as part of economic development strategies and assume jobs growth, more international migration, investment in transport and communications infrastructure, and initiatives around ‘liveability’ will lead to population growth.
- None have conducted research on whether such strategies are actually linked to changes in demographic fortunes.
- Newfoundland and Labrador (Canada) has a very detailed population strategy, focusing largely on retaining people already there. Others are more concerned with attracting new residents by promoting education and ‘knowledge industries’, investing in tourism development, and attracting previous residents to return.
- Few jurisdictions set specific targets for population growth, but several have broad targets relating to particular population segments, including youth (ages 15-29) and families.
- Alaska has implemented initiatives to retrain people (such as ex-military) for resource sector jobs.
- Many jurisdictions are using international refugee migration as a lever for population growth.
- Norrbotten and Troms have similar economic/population growth strategies. Troms has successfully developed a world class university and knowledge economy. Norrbotten has attracted many Finnish migrants.
- A large European Union Northern Periphery and Arctic Programme project Recruit and Retain has a strong focus on exposing people to northern regions (as tourists, students, visiting workers etc.) and then using them and other past residents as ‘alumni’ to encourage in-migration as residents.

Key Action Items:
1. There are seemingly no single or simple solutions for government to turn population futures around for places like the Territory. However, the Territory Government should seek to directly influence growth where it can in areas such as:
   - Negotiating for refugee and other international migration intakes;
   - Leveraging growth as Territory’s largest employer to target key markets for attraction and retention;
   - Working with other employers to generate new jobs and provide life-long career pathways.

2. The Newfoundland and Labrador Live Here, Work Here, Belong Here strategy might be considered as a useful template for how to present population strategies to the public.

3. Jobs creation, international migration, improved transport and communications infrastructure, growing ‘knowledge economies’ and improving the ‘liveability’ of cities and towns are key planks of all population policies, but the Territory needs to determine very specific actions in these areas to ensure there are clear links between strategies and target populations and allow policy successes to be monitored and evaluated.
2.1 Introduction

In this Chapter we examine demographic trends for jurisdictions in other parts of the world that we consider to be similar to the Northern Territory. There is a particular focus on how these jurisdictions have experienced periods of low population growth, and what strategies have been employed to try and recover from and avoid future such periods. Like the Northern Territory, during this Century eras of low population growth have been observed for northern and sparsely populated areas which might be considered to have similar population, economic and geographic characteristics. An analysis of demographic trends in 16 ‘regions’ which are either a country or a province of a country and which are recognised as either ‘remote’ or ‘sparsely populated’ as part of CDU’s Demographic Research Program identified twelve which have experienced periods of very low population growth (relative to their long term trends) in this century, for which there is sufficient data to investigate migration related correlates. These are identified in Table 3, with red blocks showing the periods of low growth (and often population loss), blue blocks showing periods of ‘normal’ growth, and grey blocks showing periods of low growth but for which we have limited information. In addition to these twelve, the Scottish Highlands had low growth from 2012 to 2016 (but poor information on causes), Yukon in Canada had low growth in 2000-2002, as did Norrbotten in Sweden. Only Troms County in Norway has not had a low growth period in this century, although it had a low growth period from the early 1990s until 1999.

Periods of low growth across this set of jurisdictions are clustered at the turn of the century, around the period 2004-2009, and since 2013. Most jurisdictions in Table 1 have experienced low growth in two of these periods, but none has had low growth in all three periods. The 2004-2009 period is usually associated with impacts of the global financial crisis, but predates the ‘shock’ of that crisis (2008-2009), suggesting that these ‘remote’ regions may be among the first to experience the demographic outcomes from periods of economic volatility.

Table 3 - Periods of low and high population growth for selected northern jurisdictions

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Across these northern jurisdictions, population strategies are either non-existent, or contained within more generic ‘economic development’ or ‘regional development’ strategies or frameworks. In some cases, population issues do not rate a mention even in these development strategies. We have been able to investigate strategies from 14 regions as listed below in order of how specific they were about population issues:

- Newfoundland and Labrador (N&L) (Canada)
- Västerbotten (Sweden)
• Faroe Islands
• Troms, Nordland and Finnmark in Norway (which have a joint strategy)
• Norrbotten (Sweden)
• Alaska (USA)
• Iceland
• The three northern territories of Canada (Yukon, Northwest Territories, and Nunavut - which have a joint strategy)
• A joint strategy for Greenland, Denmark and the Faroe Islands

N&L is the only one of these to have an explicit population strategy – *Live Here, Work Here, Belong Here*, which covers the period 2015-2025 (https://www.gov.nl.ca/populationgrowth). It includes dozens of initiatives grouped under ‘workforce development’, ‘families’, ‘communities’, and ‘immigration’. Of these, workforce development is the most comprehensive, while communities are the least tangible. The strategy includes an evaluation framework which covers the main demographic indicators plus employment measures. Specific targets for each indicator are not usually set however, with just a generic statement that they want to do better than what official population projections for the jurisdictions suggest. The exception is for youth (ages 15-34), where the aim is for ‘sustained net positive youth migration’ (although no target volume is set).

In substance, the N&L strategy is largely a collection of economic and other initiatives, overlaid with coordination and promotion activities. For example, a range of support programs already existed for families, immigrants and people with disabilities, although they might not have been previously well coordinated, and people may not have known how to access them. Support include a myriad of financial provisions (benefits or tax relief), and entry into pathways for education and career development. There is also a focus on exposing young adults to job opportunities (through summer scholarships, for example).

The N&L strategy is interesting in the context of this report for a number of reasons. Firstly, apart from international migrants, there is no real consideration of how new people will be attracted to the region apart from through generic promotion. Secondly, there is an assumption that the people that are there, or could be attracted, will not be prepared for the labour market. This is in contrast to strategies which attempt to source people who are ready for the jobs the region has to offer. Thirdly, and perhaps related to latter, there is no real focus on expanding industries beyond providing support (regulatory and tax) for small businesses irrespective of the sector in which they operate. Almost all the strategies for other jurisdictions talk about growing specific parts of the economy, but the N&L ‘flavour’ appears to be that there are already sufficient jobs in the key sectors of health, construction, education, oil, gas and minerals, and fishing; just insufficient workers. Finally, most other strategies have a strong emphasis on transport and communications infrastructure, but this is barely mentioned in N&L (beyond a desire to improve broadband speeds and access).

The demographic composition of N&L is substantially different to the Territory. It has an old population with high net negative youth outmigration. But in the 1970s and 1980s, the population was similar to what the Territory is now – young, mobile and subject to periods of rapid growth (Figure 6). In 1992, the cod fishing industry was dramatically reduced in size, creating a very rapid demographic shift. While a shift in the composition of this nature is not currently forecast for the Territory, the N&L transition to a much older population in a relatively short time emphasises the dynamic nature of small populations, including those which once ‘looked like’ the Territory’s does today. The aim now for N&L is not to return to what was, but to ‘stabilise’ some key groups (youth, young families and older working age) and then to try and grow again in future. No evaluation of the strategy or its component initiatives has yet been published.
Figure 6 - Changes in population structures in Newfoundland and Labrador, 1986-2016 (including comparison to the Northern Territory, 2016).

Source: Author calculation from 3101.0 Australian Demographic Statistics December 2016 (Australian Bureau of Statistics) and Newfoundland and Labrador Statistics Population and Demographics (http://www.stats.gov.nl.ca/statistics/population/)

Note: N&L is on the right (1986 and 2016) and the Northern Territory on the left (2016)

While the Västerbotten Regional Development Strategy (2014-2020) is not specifically a population strategy, it includes two specific population development targets. They are: to have an ‘improved position’ in 2020 over 2010 in terms of the net migration rate of residents aged 19-44 years; and to increase the proportion of the population that is foreign-born. There is also a less concrete target of encouraging ex-residents to move back, with a specific focus on women. The foundations of the strategy then are very similar to the other regions (excluding N&L) and include:

- Promote continued growth in the resource sectors (especially forestry, mining and energy generation in Västerbotten, but also fishing in other parts of northern Europe);
- Grow tourism;
- Grow ‘knowledge industries’ with a focus on promoting areas of research expertise (particularly those with local importance and a global market such as Arctic exploration or engineering);
- Implement programs to get difficult to employ people into education and training, and ultimately the workforce (young adults, late working life adults, international migrants, women with children, people with disabilities);
- Invest in transport and communications infrastructure, particularly broadband, and including transport within the region as well as to the ‘outside world’;
- Increase connectivity with other places (especially international places) which can contribute to economic development and provide streams of international migrants; and
- Promote the lifestyle and invest in cultural activities.

N&L and Västerbotten have also both established funding schemes to support business and communities to implement programs which align with the aims of the strategy.

In Västerbotten, as in other parts of northern Europe, local government is a particularly powerful institution. Local governments run the school systems, elderly care and other welfare systems, and have responsibilities for
economic development (project approvals and so on). There are several population related local government activities in Västerbotten that are worth mentioning. One is the Recruit and Retain: making it work project which is funded by the European Commission Northern Periphery and Arctic Programme in collaboration with partners in Sweden, Canada, Norway, Iceland and Scotland. Swedish partners are Västerbotten County and Storuman municipality\(^1\). The project aims to attract more professional workers (with a focus on health and education professionals) to sparsely populated areas. In Sweden at least, the project has expanded its scope to look at how to make rural communities generally more attractive through promoting different lifestyles (urban apartments and rural acreages, for example, and sport and recreation activities), and creating a database of ‘alumni’ which includes past residents and those who have visited for education and work. The database will be used to promote opportunities for past residents to ‘come back to Storuman’. Note that Tasmania has implemented a similar strategy (see Chapter 3). Other initiatives under the Making it Work project are listed in Appendix 3.

Storuman municipality is involved in another Northern Periphery and Arctic Programme project called Regina (regional innovation) which focuses on regions with potential for new large scale resource projects in Sweden, Scotland, Norway, Greenland and Finland. The project is modelling the possible demographic impacts of large scale projects, and then seeking strategies to counter potentially negative outcomes such as increasing gender imbalances, costs of hosting non-resident workers, and impacts on access to land (particularly for Sami reindeer herders). Specific strategies to recruit resident workers and address these potential impacts have not yet been developed, however the research has shown that the demographic impacts of large resource projects (mining, windfarm, hydro-electricity etc) have decreased over time as these projects have ever smaller (local) workforces, are completed in faster times, and consistently deliver lower economic benefits and other spinoffs for the regions in which they are located.

Local governments in Sweden are also able to bid to host international refugee migrants at various stages of their immigration processing. In the past few years, several municipalities, including Sorsele and Åsele in Västerbotten, have experienced dramatic demographic change as a result of the influx of unaccompanied minors, asylum seekers awaiting processing, and resettled refugees from Syria and Afghanistan. There has also been some turnaround in population loss in some of the smaller communities in northern Sweden as a result of increased intra-Europe migration in the past decade. Many migrants have established small scale tourism and craft businesses, typically in the more isolated parts of the region, rather than in the larger urban centres.

Most other strategies for regions listed at the start of this chapter are relatively similar to Västerbotten’s strategy, however there are some additional initiatives worth noting. Alaska’s Northern Opportunity strategy has a focus on getting people to stay in the resource sector longer through expanding career pathways. An outflow of mid-career workers (aged around 35-49) as a result of lack of career development opportunities is a common experience among many jurisdictions. Alaska is trying to address this through a career pathways program (in collaboration with industry) and by providing support for people to change jobs or careers within Alaska. For example, ex-military personnel may be encouraged to stay if they can get attractive jobs in the maritime sector.

Figure 7 shows there are markedly lower proportions of workers aged 35-44 years in each of the jurisdictions, aside from the Territory, all have increases in proportions aged 50-54 years. Strategies in Alaska and (to a lesser extent) Västerbotten are trying to address this ‘middle career’ decline (ages 35-49). Iceland is included because it experienced a sharp rise in the proportion of workers aged 50-64 years as it recovered from a period of population loss following the Global Financial Crisis (GFC, from 2009 to 2013).

\(^1\) Note that Charles Darwin University has also been an external partner on this project through an agreement with Västerbotten County to procure some of Dean Carson’s time to assist in project evaluation.
Iceland has had a strong economic and demographic recovery from the GFC. Its demographic decline was caused primarily by a dramatic decrease of in-migrating workers associated with the newly de-regulated financial sector. There was also, however, out-migration of mid-career workers from that sector, as well as the resource and manufacturing sectors that otherwise dominated the Icelandic economy. The recovery was largely driven by the in-migration of 50-64-year-old males, many of whom were previous residents returning after economic conditions had improved. There was no specific strategy to promote return migration, but Iceland has a history of implementing strategies to get young adults who leave for education (primarily to Denmark) to return. There was a notable increase in the number of Icelandic-born migrants to Iceland during the past 5-7 years. Similar ‘return home’ approaches are used in Greenland and the Faroe Islands. These involve providing scholarships for local youth to study abroad, maintaining contact with them while they are away, and actively promoting job opportunities to these groups as they arise. The Faroe Islands, in particular, places emphasis on establishing relationships with individual universities, and encouraging students to do work placements and summer jobs ‘back home’.

Faroe Islands and Iceland have also invested heavily into improving internal transport infrastructure to facilitate population development outside of the main cities and to reduce the sense of isolation for people who are recruited to work in more isolated places. While a formal evaluation of the effectiveness of these is not publicly available, a presentation by consultants to the Faroese government in 2010 claimed that this improved infrastructure had been a major factor in enticing a large number of early career workers back to the Islands.

In Greenland, Canada, and Alaska, specific attention is given to Indigenous populations. Nothing is said about influencing migration patterns, but there is attention to health interventions and education and workforce development. In Greenland, there is a clear tension between the expectation that economic development will be driven largely by imported workers, the desire to engage local people in that development and the desire to retain traditional activities such as hunting. Similar issues have been raised in Canada and Alaska. Alaska also notes the importance of Indigenous populations to maintaining a positive rate of natural increase, which is projected to be the main driver of population growth in the medium term.

Notably there are three regions in our list that did not experience a population growth slowdown in the mid-2000s. Of these, Norrbotten in Sweden is the only one with any specific mention of population in its development
strategies. Despite having strong population growth, there remain concerns about (female) youth out-migration and the challenges of an ageing population. The key strategy to address the former is to develop “more attractive towns and cities” (without any specific strategy to do that at the County level at least), and to facilitate what the Regional Development Strategy calls “boundary crossing”, which is primarily about facilitating population and economic exchange across international borders. The Troms region in Norway is covered in the Norwegian High North strategy, but has specifically exploited the knowledge sector (a large university, biotechnology research, and telemedicine, for example). The Lapland region in Finland has a Regional Development Plan for 2030, but the foundations of that plan are almost identical to what is done elsewhere. It should also be noted that the Lapland region in northern Sweden has experienced consistent population loss for at least the past 30 years, with recent years largely featuring smaller losses, rather than a turnaround to growth.

In summary, population strategies are typically part of broader economic development strategies. Consequently, there is a strong focus on economic development and job creation to foster population growth. Economic development comes through growing the extraction and processing of natural resources, development of knowledge based economies (particularly through universities and research institutions), and promotion of cultural and tourism industries. Youth (who grew up in the region), young families, women, and mid-career workers are seen as most difficult to recruit and retain. Strategies that go beyond job creation and education and training include direct support for families (childcare, housing), and improving transport and communications infrastructure. Few regions have strategies to evaluate the effectiveness of their policies, and even where those strategies exist, the results of evaluation cannot be accessed. Newfoundland and Labrador appears to have the most comprehensive policy approach to population development (and a broad evaluation strategy of outperforming population projections), and the Recruit and Retain: making it work project across several countries appears to share with N&L the specification of a large number of very specific initiatives targeting various population groups. Of these, and based on the experiences of other regions, strategies which encourage previous residents to return, which expose new people to the region as students or visitors (collectively ‘alumni’ strategies), and which target particular life stages (transition to working life, family formation, mid-working life career progression, transition out of work) appear to be best supported by the research which underpins and accompanies plans and policies. In general, jurisdictions like the Territory have accepted that large scale developments which also attract large numbers of new residents are becoming increasingly unlikely for reasons explained in Chapter 7, and that sustained long term population growth is instead likely to depend on a series of small but targeted initiatives.

Many strategies make reference to concepts such as ‘liveability’ and ‘lifestyle’, without very specific explanation of what these mean. Liveability variously seems to refer to opportunities for recreation (particularly nature-based), types of housing, visual amenity, ‘sense of community’, quality of education for young children, access to health and social services, transport and communications connections (both within the region and to external places), and low costs of living. ‘Liveability’ is clearly an essential attribute to both attract and retain migrants and residents, but each jurisdiction appears to have its own (often ill-defined) set of criteria for what liveability means in its context.
3 Population growth strategies for other parts of Australia

Purpose of this Chapter:
This chapter is about identifying population growth strategies implemented other parts of Australia and commenting on their success.

Core Messages:

- Only Tasmania has had specific population policies in the past twenty years, the most recent being the 2015 Population Growth Strategy. Other States typically include population issues in broader strategic plans or economic development strategies.

- High growth States (Queensland, New South Wales, Victoria and Western Australia) typically have strategies to manage anticipated population growth (based on formal population projections), including trying to disperse population to regional areas, and trying to target specific types of (primarily international) migrants, including business and skilled migrants and students.

- Low growth States (South Australia and Tasmania) typically have strategies to stimulate population growth to achieve aspirational population targets much higher than anticipated by formal projections. Those strategies are very similar to what has been reported in Chapter Two.

- There has been no academic analysis on causes of periods of low or high population growth in other States apart from broadly linking these to the performance of particular economic sectors (mining, manufacturing, agriculture). There is no concrete evidence how policy interventions impact population growth.

- Demographer Natalie Jackson analysed Tasmania’s brief period of population growth at the start of this Century. Growth was attributed to increased in-migration of retired and semi-retired Australians attracted by affordable housing and quality of life, and to higher international migration from ‘new’ source countries, particularly in Africa.

- Few regions have experienced population growth patterns that differ from other regions with similar economic foundations. Regions that have experienced relatively high growth either had diversified economies (for example, Hunter Valley) or invested heavily in higher education (like Wollongong).

- Many regions are targeting international migrants of various kinds (particularly students), return migrants, and skilled and professional workers (from within Australia and overseas).

- In Australia and internationally, there is debate on whether regions should aim for diversified economies or ‘smart specialisation’, with little evidence on how either might help long term population growth.

Key Action Items:
1. The Territory should recognise that there are few policy levers to facilitate population growth when conditions in key economic sectors are poor (eg mining and tourism, for example). But policies promoting housing affordability, welcoming international migrants, improving higher education services, and improving transport and communications may ‘soften the blow’ and position it for faster recoveries.

2. The Territory needs to thoroughly investigate population implications from policies promoting economic diversification or ‘smart specialisation’ (for example, being an LNG hub) especially given the relatively narrow economic focus of the Developing Northern Australia agenda.
3.1 Population growth strategies for other Australian jurisdictions

Few States have had specific population strategies within the past twenty years. Tasmania has had strategies released in 2003 (we have not been able to access a copy) and 2015. In all other States, ‘population’ is an agenda within economic development policies. Broadly speaking, South Australia and Tasmania (along with the NT) could be considered ‘low growth’ States during this time, with the other States experiencing ‘high growth’. High growth States have policies which focus on managing expected population growth. Policies are informed by population projections. Management strategies include dispersal of population to regional areas, stimulating economic development (job creation), improving access to education, improving transport and other infrastructure, attracting ‘the right kind’ of international migrant (business migrants and skilled labour, international students) and improving the liveability of cities and towns. The low growth States have had policies based on population targets (typically much higher than any official projections). Mechanisms to achieve those targets have included stimulating economic development (job creation), improving access to education, improving transport and other infrastructure, and improving the liveability of cities and towns. Tasmania and South Australia also target increased international migration, including business migrants, skilled labour and international students, but also humanitarian migrants. Tasmania’s quite comprehensive Population Growth Strategy (https://www.stategrowth.tas.gov.au/policies_and_strategies/populationstrategy) targets regions across the State. South Australia’s Strategic Plan (http://saplan.org.au) focuses growth efforts on Adelaide, while at the same time acknowledging regional depopulation as a key issue.

There has been no detailed analysis of the causes of positive ‘turnarounds’ in population growth rates (experienced by Queensland in the 1970s, Victoria in the 1990s, Western Australia and Tasmania early in this century, for example) by academics or consultants. Typically, changes in growth patterns are simply described, and reasons are given at high level and relate to the changing fortunes of different economic sectors (mining, manufacturing, agriculture). While Tasmania’s Strategy includes plans for research to inform policies and programs, details of what research will be done or has been done are not provided. There is, therefore, no concrete evidence of whether policy interventions in the Australian context make a significant difference to stimulating population growth.

Tasmania experienced a brief period of high population growth at the start of the 21st century. (Then) University of Tasmania demographer, Natalie Jackson, in a report released in 2005 attributed that turnaround to an influx of near retirement aged and newly retired migrants from mainland Australia attracted by affordable housing and high amenity values of Tasmania’s cities and towns. There was also a contribution from international migrants, particularly those from ‘new’ source countries, including African countries. The current Population Growth Strategy continues a focus on attracting these international migrants, but is more concerned with attracting working age people. Interesting aspects of the Strategy include:

- Ambitions to attract more international students (primarily university students): a strategy shared by all States;
- Ambitions to retain young adults through improved education and employment pathways; and
- A strong focus on encouraging previous residents to return to Tasmania.

Beyond these, there is no consideration about specific population groups to be targeted. South Australian policy also acknowledges the outflow of young adults and the potential for improved education and employment pathways to stem this outflow. Both States have population targets expressed as a single number (650 000 for Tasmania, 2 million for South Australia) to be achieved by a specific year (2050 for Tasmania, 2027 for South Australia). Both States describe some broad aspirations (especially around liveability and economic growth) and some specific actions (infrastructure projects, job creation schemes), but there is little information provided about how these strategies link to the overall target. The Tasmanian Strategy does include one graph showing the positive correlation between rate of economic growth (GSP) and rate of population growth.
At the sub-State level, ‘growth’ strategies typically include a desire to increase population, and target job creation, infrastructure (and housing) development and ‘liveability’ in a similar way to State strategies. We analysed rates of growth at regional (SA4) level between 1991 and 2016 to try and identify regions which had experienced periods of strong growth following periods of slow growth or decline. While many such regions exist, there has been very little research into what caused the turnaround in any single region. Growth is usually attributed to change in the economic conditions applying to the major local industry (mining, agriculture, tourism). For some regional centres (Wollongong, Mackay, Mildura, Bendigo), growth has also been attributed to ‘liveability’ projects such as streetscaping and neighbourhood and precinct development. Wollongong’s ‘revival’ has also been attributed to the improved status of the University of Wollongong (attracting and retaining young adults) and spill over from Sydney inspired by lower housing costs.

Our analysis reveals that patterns of population development are very similar for regions dependent on particular economic activities (see Figure 8). Regions with strong mining, tourism and ‘regional services’ economies did slightly better than agricultural or ‘Outback’ regions during the early part of this century, while agricultural and ‘regional services’ regions have performed a bit better during the past few years when tourism and mining regions have experienced slowing growth.

**Figure 8** - Average rates of population growth for regions with various economic foci, 1992–2016

Source: Author’s calculations from 3218.0 Regional Population Growth, extracted using ABS.Stat
Note: Individual regions can be included in more than one category.

Some specific regions have done better than others, and these are typically regions with more diversified economies (such as the Hunter Valley which has mining, agriculture, and tourism strengths). Economic diversification (an objective of most regional growth strategies) has allowed some regions to re-assign labour within the region, and to attract new workers in one industry to replace departing workers from another industry. While we do not have expertise in economic policy development or analysis, there is some evidence that policy can improve prospects for economic diversification by fostering development of multi-purpose infrastructure (such as transport infrastructure that can service multiple industries), allocation of land for different purposes (retaining agricultural land, setting aside land for recreation), and providing relocation and other incentives for a variety of business types. It should be noted, however, that diversification as suggested here (encompassing industrial activities that are only loosely related to one another) is a strategy somewhat at odds with the emerging concept of ‘smart specialisation’ being promoted as the key to regional development, particularly in Europe (Naldi et al., 2015). Smart specialisation is concerned with reducing the breadth of economic activities in a region while increasing the depth of engagement in specific activities. Both forms of diversification (among industries or
activities and within a single industry or activity) may help promote long term sustainable population growth at the regional level.

In summary:

- State and regional population growth appears closely tied to economic conditions, and the impacts of policy interventions may be minimal;
- Tasmania and South Australia have specific population growth targets, but no clear links between population and economic strategies and these targets;
- Job creation, attracting international migrants (particularly students and skilled workers), and improving ‘livability’ are common population growth strategies;
- Tasmania is promoting return migration of previous residents, and South Australia is focusing growth strategies on the city of Adelaide; and
- There is no strong evidence to link specific strategies to population outcomes, although the limited analysis of changes in States and regional growth rates in the past has identified housing affordability, new sources of international migrants, improved tertiary education facilities, and economic diversification as potential drivers of population growth, and there may be policy levers which can influence these.
4 Pull and push factors for Territory migration

Purpose of this Chapter:
In this chapter we examine past research to identify the main factors which encourage people to come to the Territory, leave the Territory and stay in the Territory (we call this ‘survivorship’).

Core Messages:
• ‘Work’ is by far the biggest driver of migration to the Territory, although there is an important lifestyle motivation for those who have had previously lived here. A strong work motivator is ‘career escalation’ - either getting a higher level job in the Territory than might be available elsewhere, or using the Territory experience to leverage a higher level job on departure.

• ‘Work’ is also the main factor influencing decisions to leave the Territory.

• Almost all people who left were ‘satisfied’ or ‘very satisfied’ with their time in the Territory and surveys have shown that about one-third of people who leave the Territory intend to return later in life.

• Older Territorians cite lifestyle factors (climate, law and order, and cost of living) as influencing out-migration decisions.

• Some factors that lead to people leaving the Territory (climate, distance from family and social networks) are difficult to influence, while some (lack of career progression opportunities, concerns about law and order) might be influenced by policy. The Territory Government can play a direct role in addressing career progression concerns because it is a large employer.

• Several research projects have shown that getting people to stay for five years leads to high retention of populations of all ages. The ‘critical’ period to encourage five year stays is likely the first year or two as people consider moving from temporary to more permanent living or working arrangements.

• While little is known about the motivations of Indigenous people to move to, stay in, or leave the Territory, there is an increasing net outflow of Indigenous Territorians which needs to be understood and addressed.

Key Action Items:
1. Strategies which promote opportunities for career development (at all stages of career) might help attract and retain workers in the public and services sector in particular

2. There is strong evidence of an ‘alumni’ effect in the Territory, meaning that strategies to maintain contact with past residents and visitors should be implemented.

3. Strategies to make people feel welcome and attached to the Territory within a year or two of arrival will be critical to increasing retention rates. Assisting in moving from temporary to more permanent housing, planning career progression, and managing ‘transitions’ between life stages (planning how to raise a family, for example) is likely a key to success.

4. Efforts should be made to understand the causes of increasing outflows of Indigenous people from the Territory, and what might be done to encourage more Indigenous Territorians to stay or return, and Indigenous people from other parts of Australia to consider moving to the Territory.
4.1 Introduction

In this chapter we describe the Territory migration system and summarise factors shown to encourage people to move into and also out of the Northern Territory. We then move to identifying the characteristics of ‘survivors’ in the population. This chapter is based on research conducted by the authors with a range of groups and supplemented with information from a 2016 Deloitte Access Economics (2016) study, which has findings remarkably consistent with our past studies. We focus on examining and summarising:

- Common factors for moving into and out of the Territory;
- Factors for attraction and retention of particular ‘markets’;
- Factors for attraction and retention which might be different to elsewhere;
- The role of internal migration;
- Factors which might be influenced by initiatives and those which are unlikely to be influenced by policy and initiatives;
- Important characteristics of ‘immobile’ residents in the Territory (the survivors);
- The role of life stages for retention and the migration system; and
- The role of time and survivorship in the population for influencing migration intentions.

4.2 Coming to the Territory

As with elsewhere in the world, push and pull factors for migration to and from the Territory fall into three main categories – career, family and lifestyle drivers. Our analysis of interstate migration data in Chapter 1 suggests career and work drivers for individuals or their spouse predominate and are the main drivers for at least three quarters of all arrivers. This is the case in all of the studies we have produced including for the large Territory Mobility Survey of 2008, where work factors (found work, looking for work, different work or work posting) were the main reason for moving to the Territory for around 65% of the 654 respondents (Figure 9) and, likewise, for 67% in the 2016 Deloitte survey.
A strong work motivator across the various surveys is likely a desire for career ‘escalation’. This is where migration is enacted due to perceived or formalised better employment opportunities. Movers are likely to consider a range of aspects related to employment including salary, a more senior role, opportunities to apply specialist skills and education, opportunities for spouses and opportunities for engagement with the Indigenous peoples of the Territory through work. Escalator migration to the Territory also helps explain why many people do and will continue to come for a limited or fixed period of time. For many the purpose of coming to the Territory is to satisfy the requirement to ‘jump up’ the career ladder and, as a result of the experience and improved Curriculum Vitae, re-enter the southern workforce at the ‘escalated’ level. The extremely high in-migration numbers and rates for early career workers reflect this situation. Early career migration patterns have previously been dominated by males; however there are signs of a large increase in male departures towards the end of the early career stage which has not been met by an increase in arrivals (more on this below).

Despite the overall prominence of work for attracting people to live in the Territory, and particularly for the main arrives ‘market’ of early career workers, different groups within the population place different levels of priority on their reasons for coming to and leaving. For example, the Deloitte survey found that, of those who had already lived in the Territory, 31% were extremely likely or fairly likely to return and in the Territory Mobility Survey (TMS) 30% of residents had previously lived in the Territory. Based on TMS findings, this exceptional potential to re-gain people from the ‘alumni’ market is driven less by work factors and more (relative to first movers) by the individuals’ existing social networks and the lifestyle within the Territory. Having said that, we have identified a recent trend for late-career workers to move to the Territory during ages 50 to 60 in order to finalise their working life doing ‘something different’ and/or to maximise their superannuation returns. The potential to re-attract prior residents by targeted initiatives according to life stage is clear, although tempered somewhat by TMS findings that a quarter of returned residents plan to leave again within three years. Lifestyle issues such as climate, housing, law and order issues and cost of living appear to be relatively low in priority for mid-career people considering returning to the Territory, but for older people much more emphasis is placed on these.
4.3 Migration within the Territory

Although in comparison to other Australian jurisdictions both the numbers and rates of population redistribution within the Territory through internal migration are small, this is an area worth considering for discussions about the Territory’s population futures. Through a combination of a reduced ‘willingness’ of interstate and overseas migrants to settle in the remote and very remote parts of the Territory as well as the ‘funnelling’ effect from internal migration towards Greater Darwin, our population is more concentrated in the Greater Darwin region than in the past. By 2016, and for the first time, 60% of Territorians lived in Greater Darwin. This was the only region to experience growth of any note during the years of the recent negative era. Steady and long term urbanisation may erode the capacity for growing the population and economic base of our regions. For example, local governments may have stagnant or diminishing rates bases and the potential for innovative business start-ups and growth may be limited by confined exchanges of people and skills.

Internal Territory migration patterns help to emphasise some of the differences between the Territory’s population ‘system’ and that of other jurisdictions. It is evident, for example, that labour requirements are usually not met by people from within the Territory moving to where the labour is needed. Instead, labour is primarily sourced externally. Workers sourced externally are more likely to leave the Territory once their contract or intended time in the Territory is realised. This established practice has helped create a situation of very low unemployment rates and high participation rates in the Territory when compared to other jurisdictions. For example, the Territory’s average employment to population ratio during the past five years to August 2017 was 71.7% compared to 61.1% nationally (6202.0 - Labour Force, Australia, August 2017). Hence, those who have moved to the Territory primarily for work and faced with the prospect of being or becoming unemployed are much more likely to leave the Territory than either remain unemployed in the Territory or to seek work elsewhere in the Territory. In the TMS, a third of those who had left the Territory said they were unemployed.

The obvious ‘solution’ to this aspect of Territory population dynamics is to source more labour from within the Territory. This is likely to require a long term commitment to growing the prominence, community presence and quality of the university sector, reducing emphasis on big projects (which rely almost exclusively on externally sourced labour) and ensuring transport, services and infrastructure in Territory regions are constantly improving. This is certainly a tall order, however, urbanisation within the Territory is a reminder of the need to consider the ‘role’ of Territory regions and to assess how their population bases might be augmented through initiatives like decentralisation of government workers and infrastructure development (particularly transport).

4.4 Leaving the Territory

Work and family related reasons dominate studies on reasons for leaving or intending to leave the Territory, however as for coming, the weight of these varies across life stages. In addition to migration out of the Territory due to unemployment or pending unemployment, work reasons may include a new posting or job offer. Collectively 44% of TMS respondents cited work reasons (found work, looking for work, different work or work posting’) and in the Deloitte study 38% (obtaining work, career progression, looking for work, different/unique work opportunities, work postings/transfers, redundancy and safety at work) for deciding to leave.

While work reasons dominate young and middle ages, after age 55 years retirement and family or social networks were the main reasons for both coming to and leaving the Territory as reported in the TMS, confirming that priorities change across life stages. Older Territorians are the fastest growing cohort in the population and, as the generation of ‘stayers’ from post-Cyclone Tracy recovery and rebuilding as well as early Self-Administration are moving into retirement, there is a time critical aspect to retaining older Territorians. Looking more closely at older residents for clues on why they might leave, a study by the researchers and COTA NT in 2014 found 20% of respondents (n=1,865) said they intended to leave the Territory in the next five years. Cost of living was the most prominent reason at around 30%, followed by being closer to family or friends. A higher proportion than in other
studies identified the climate in the Territory as a reason (15%) and health service access (12%) as other reasons for leaving (Figure 10). Fortunately housing costs have reduced significantly since that survey was conducted and this may assist in retaining some of the current crop of pre-retirees, although it may also encourage long term home owners to sell up and leave before prices drop further.

Figure 10 – CDU and COTA Territory Seniors study (2012-13): Reasons for intending to leave the Territory within five years

Studies identified the climate in the Territory as a reason (15%) and health service access (12%) as other reasons for leaving (Figure 10). Fortunately housing costs have reduced significantly since that survey was conducted and this may assist in retaining some of the current crop of pre-retirees, although it may also encourage long term home owners to sell up and leave before prices drop further.

Figure 10 – CDU and COTA Territory Seniors study (2012-13): Reasons for intending to leave the Territory within five years

Family reasons are also prominent for those who have left the Territory. Around 15% of movers out in the TMS cited family or social networks as reasons. This was higher in the Deloitte study at 24%. Movers out in the TMS were most likely to live in couple families with children (37%). This may reflect a practice of young and early career couples moving in for work, starting a family while in the Territory and then leaving to be close to family support networks which have remained in place in other parts of Australia or overseas.

Another critical group to consider in terms of retention are growing overseas migrant populations around the Territory, and particularly skilled migrants who make up the bulk of the permanent visa migrant intake. Our study in 2013 investigated the reasons for leaving the Territory for Regional Skilled Migration Scheme (RSMS) and State or Territory Nominated Program (also known as SSRM) migrants. Some 78% or RSMS and 83% of SSRM migrants said they had no intention of ever leaving the Territory, however this may have been influenced by the perception of needing to stay to fulfil visa requirements. Some 7% of RSMS and 10% of SSRM migrants had already left the Territory (within 3 years of arriving). Reasons given for having already left are shown in Figure 11 below. The most notable results are the influences of costs of housing, general living costs and the climate or remoteness of the Territory. Reduced housing costs since the time of the migrant study may be helping to encourage more people to stay longer and this may partly explain the continued growth in the proportion of overseas born in the population.
Recent changes (July 1, 2017) to skilled migration programs are yet to be evaluated as data on overseas migration numbers are not yet available. However, the whole of the Territory is covered under the new Designated Area Migration Agreement (DAMA) making it the only region with this kind of labour agreement with the Federal Government. Its language and income concessions should assist the Territory to attract more overseas migrants than it otherwise might have, however impacts from these changes are yet to be assessed.

4.5 Understanding Territory survivors

As well as examining who arrives and leaves (and the reasons they do so) it is important to investigate the characteristics of people who stay and ‘survive’ in the Territory population and to assess how the passing of time as a resident in the Territory affects survivorship. These questions relate to the issue of ‘embeddedness’ in the Territory which we will also discuss in this section based on past studies with doctors and others.

Understanding length of stay in the Territory for new migrants, existing residents and those who have already left is one part of the overall Territory migration picture. In the TMS we found over half of the people that arrived in the Territory had planned to stay for a fixed period of time, 25% intended to stay less than 3 years and 13% for between 3-5 years. While those with a fixed plan and timeframe may be unlikely to be influenced to stay, the Deloitte study found 48% had stayed longer than they had planned while only 11% had stayed less than planned.

In terms of length of stay, the five-year period appears to be significant. The Deloitte study, for example found this was the median length of stay in the Territory for those who had left. In our study of almost 2,000 older Territorians we observed a large ‘decay’ in the intention to leave the Territory after five years or more of residence. This inverse relationship between number of years in the Territory population and likelihood of leaving applies across all ages, such that encouraging people to stay beyond the five-year median is likely to greatly help with retention overall. Having moved within the Territory (for example for work, a better house, to try something new) was shown in the TMS to be associated with a far greater length of stay at 12.3 years on average compared to 9.7 years for those who had migrated out of the Territory.

To extend survivorship in the population it is important to target the right groups. While fixed term migrants are unlikely to extend, those who have no established idea on leaving appear to be the prime target for possible initiatives. The TMS found almost 30% of movers into and 22% of movers within the Territory (noting in this group many more had no intention to ever leave) were unsure whether they would stay in the Territory for five years or more (Figure 12). There may also be scope to sway those who anticipate staying five years but settling long term elsewhere (the first in from right columns in Figure 12 below).
Age plays an important role in survivorship beyond five years, according to research by our colleague, James Thurmer. There is a much lower rate of survival for people aged 20 to 34 years and a dip in survival for those 65 to 69 years after retirement (Figure 13). With a large group in the population currently transitioning to retirement age, reducing the dip at age 65 to 69 will be important. Outside of Greater Darwin, the percent of non-Indigenous people remaining is around 5% lower for all ages.

Birthplace also influences survivorship in the Territory. Those from New Zealand, Southern and Eastern European (as opposed to North-West Europe), South-East Asia and North East Asia are most likely to remain. This aligns well with the growth markets for overseas migrants during the past five years which were identified in Chapter 1 (the Filipino, Indian and New Zealand communities in particular).
In the TMS we identified some specific factors that could be improved in the Territory to encouraged movers into and within the Territory to stay. The main one was ‘tax/financial incentives’, followed by ‘improved health services’ and ‘subsidise purchase/rental property market’. Interestingly, ‘improve career/professional development opportunities’ was at the lower end of the scale. This may be because a large number of respondents were already working in the manager/professional positions. For pre-retirees and retirees these are important considerations, particularly given the cost of living due to climate (power and transport costs) and housing.

While such factors are important, ultimately long term survivorship in the population requires the individual and their families (where relevant) to have some level of embeddedness into their community and with the Territory lifestyle for it to be realised. In a 2010 study of General Practitioners (GPs) living in the Territory for less than three years, our colleague Katrin Auer examined how the process of forming ‘place attachment’ between GP and practice location might influence prospects for retention. The study identified central distinctions between GPs ‘adjusting’ to living in their community, by making compromises on prior ambitions and lifestyle aspirations to enjoy the Territory for a short period of time, and ‘adapting’ to living here by becoming invested in the community and work practice. Those who actually influenced the community by being involved (for example, introducing new activities or programs) were most likely to adapt, and thus less likely to leave in the short term. At this point in time we are surveying the ‘sticky’ German born population of the Territory because this is a growing cohort with high rates of survivorship, particular for females. It is thought German born Territorians are well connected to community groups and networks. In short, long term survivorship requires, at least in part, individuals to adapt to living in the Territory by become ‘invested’ in the community and place in which they reside.

In summary, survivorship in the Territory is at its lowest during key life stage transitions – from school to university, from university to early career, from not being part of a family to being part of one, to having children, from mid to late career and from work to retirement. Passing through these transitions and staying in the Territory requires expectations about housing, family facilities, study, work and lifestyle to be met or at least perceived to be met. In the past five years, for example, there has been rapid growth in the population of the Litchfield area. In part this was from moving the Top End’s main correctional centre from the Darwin to Litchfield geographic area. However, a major tranche of subdivisions of existing blocks has also driven growth. It is likely that pre-retirees and retirees dominate these new blocks in Litchfield (suggested by our colleague, Jan Salmon, in her Masters research, and subject to further analysis forthcoming pending the release of migration data later in 2017) and that many are long term Territorians. This is an example of the importance of the match between life stage transitions (in this case work to retirement), housing and lifestyle. It is critical to better understand these relationships, not least because the Territory population is at the front-end of a robust ageing process, but also for clues about the factors which
facilitate within-Territory life stage transitioning for other age groups (for example, primary to high school and mid-career to late career).

4.6 Putting it together in the Northern Territory context

The analysis and discussion in this section provides a sense that a relatively large proportion of people who come and go from the Territory had in mind to do so within a fixed time period (most within three years) and, if not, had a pre-determined intention to leave at some point. These are migrants who come primarily for work and career escalation. Retention for many will not be influenced by better economic conditions or lifestyle. Such residents are not, therefore, likely to be good targets for retention initiatives. This is emphasised by very low levels of dissatisfaction for movers out of the Territory in the TMS (with only 7% either dissatisfied or very dissatisfied and consistent with the Deloitte study at 8%), indicating that pull factors around work and family are stronger than any negative (push) factors. While this bodes well for attracting alumni back to the Territory, it also suggests there are significant proportions of ex-Territory residents who will never return. Similarly, it is likely that many who leave primarily for family reasons (rather than work or career being the prime reason), particularly before or soon after the birth of children, will similarly not be influenced to stay or return.

The target markets for initiatives for reducing departures and encouraging survivorship that may be more readily influenced to stay were identified in this chapter as pre-retirees transitioning to retirement, mid-career workers transitioning to late career, overseas skilled migrants (especially from Asia and New Zealand) and career driven workers with no fixed idea about their length of stay in the Territory. We identified in Chapter 1 that the current negative era is hallmarked by increased departures across all ages but noticeably a one third increase in male departures for the large early career group and a three-quarters increase in male and female departures for seniors. Male departures in early career ages have always been high, however the increase in the present era is not offset by increased arrivals and, with these being traditionally in balance as the main feature of the Territory interstate migration patterns, the net result is considerable.

The role of family is clearly important in considering how to improve retention, including for some early career males, since the studies show movers in have a higher likelihood of being couple families with no children while movers out were more likely to be couple families with children. This suggests the Territory loses newly formed families and indeed there is a spike in age specific out-migration rates for non-Indigenous women at peak birthing ages (late 20s and early 30s). Losing families with children is a double blow to Territory population numbers as the ‘addition’ to the population of newborns is lost with the out-migration of the family, along with the possibility of future births. This also points to the need to retain seniors in the Territory given some are the grandparents of Territory families and on hand to provide financial and other support. Studies to date have not been specific or detailed enough to provide sufficient clarity and depth on the issue of family formation and the location of grandparents or other family in determining migration.

In some ways, focusing on retention and survivorship, while presenting opportunities to improve the migration position of the Territory, is secondary to the issue of ‘failure to arrive’ in significant numbers for select groups in comparison to the prior (positive) migration era. We identified the biggest losses in arrivals in Chapter 1 have been for children under 19 years (a 50% decline in arrivals) and early career females (the greatest numerical decline and by a third in proportion).

Overseas migrants hold particular promise in terms of increasing arrivals, including through the ‘chain’ migration of relatives and friends, and by limiting departures. However, arrival numbers may depend principally on skilled jobs availability and employer or government sponsorship of these. At a point when the population is ageing with a large cohort heading to or already in retirement ages, ‘surviving’ as many people in the population for as long as possible is an imperative.
Despite extensive congruence with the Deloitte study for some results, it must be recognised that the TMS study results reported extensively in this chapter, while very insightful, are now quite dated and this warrants that a refreshed look at the migration dynamics for arrivers, stayers and leavers according to the markets identified here. In chapter 8, and in line with the Terms of Reference for this report, we propose new ongoing studies for staying on top of trends in these areas so that pre-emptive strategies and initiatives can be considered by Government.

There is also a large and important group of stayers in the Territory population who we have not yet mentioned – Indigenous Territorians. It should be noted that, even though out-migration rates have been low, there has been a long term increase in negative net interstate migration for Indigenous Territorians, such that on average there was a net loss of around 700 residents (a medium sized community) between 2006 and 2011, and nearly 1,000 between 2011 and 2016.

In summary, the Territory’s migration situation currently reflects a combination of failure to arrive for some groups and increased departures for others. The main motivating factors for arrivals are still for work related and leaving is dominated by work and family or social network reasons. A buoyant jobs market is certain to help with attraction and retention, however understanding the conditions around buoyancy and the population system is complex. In addition, apparent economic buoyancy may not translate to population growth, as was experienced in the past three years where record economic outputs were accompanied by record net interstate migration losses. Some factors determining arrivals are external to the Territory and cannot be readily influenced (such as the role of the housing market and youth unemployment in southern cities discussed in Chapter 1). Likewise, some groups will not be influenced by policy initiatives to stay in the Territory because they have only a fixed period in mind – many early career workers and those establishing new families. Those who leave because of the climate are also unlikely to be influenced, however reducing costs of living may help some to stay longer.

The key to retention, therefore, appears to be targeting existing residents who are transitioning through life stages to remain ‘in place’, either by moving within the Territory or enacting the transition in place (for example buying or upgrading housing). Re-attracting alumni (re-arrivals) and increasing overseas migrant arrivals appear to be the key to increasing arrivals in the medium term. Addressing cost of living issues is likely to sway some of those in transition to stay, particularly for the rapidly growing pre-retiree segment, and help promote the idea of living in the Territory to potential new arrivals. The Territory is a place where new arrivers with no fixed departure date need to adapt to in order to survive in the population beyond three to five years. Helping these to develop a sense of community and embeddedness is clearly an overall goal, especially in more remote parts, where some specific actions might be considered. These include support for community organisations, technology and transport development as well as programs to encourage professionals to engage outside of work with the community in which they live. Regions which have a ‘purpose’ (for example as the home to a government department or two) and are gradually better connected through transport and technology are likely to be more resilient to population volatility and have a better chance of growing in the long term.
5 The pros and cons of setting population targets for the Northern Territory

Purpose of this Chapter:
In this chapter we respond to the Northern Territory Government’s request to discuss the pros and cons of setting population targets for the Territory.

Core Messages:
- Tasmania and South Australia have very specific population targets – they aim to achieve a specific population size (650,000 and 2 million respectively) by a particular year (2050 and 2027).
- Some other jurisdictions have broader ‘targets’ expressed as the kind of change they want to achieve with a particular sub-population. For example, Västerbotten in Sweden aims to have an ‘improved position’ in net migration of 19-44 year olds by 2020 compared with 2010.
- Benefits of specific-number targets include demonstrating government commitment to population issues and providing political impetus for implementation of measures designed to help achieve those targets.
- On the other hand, number-specific targets can create unrealistic expectations among investors and constituents, and make it difficult to adjust strategies when external factors intervene.
- Consequently, broad population goals or target ranges are recommended.

Key Action Items:
1. The Territory Government should consider setting broad goals for population outcomes with each goal having a clearly identified:
   - ‘Market’ (for example, age group, life stage or origin of migrant);
   - Type of change desired (for example, higher growth rates, more than double the number); and
   - Time period (for example, the next ten years).
2. An alternative is to set goals within ranges (such as, “By 2025 we will have grown the population to between 250,000 and 270,000”).
3. There should be identifiable strategies and outcomes linked to any targets or goals, as well as plans to evaluate successes.
4. Government should ensure that the locally produced population projections are taken into account in devising goals or targets so that contradictory messages are not provided to the public.
5.1 Introduction

In this chapter we respond to the Northern Territory Government’s request to discuss the pros and cons of setting population targets for the Territory. After outlining some of the benefits and drawbacks of population targets we consider some alternatives for consideration in the forthcoming population plan.

5.2 Population targets can be good because...

For governments, setting targets on population size or growth into the future may bring a number of benefits including:

- Indicating to the public that the government is taking population and economic issues seriously with decisive and specific targets;
- Signaling to planners the likely size of the population and therefore future service demand levels (for health, housing and education in particular) and long term infrastructure needs;
- Enabling expectations to be set for how high or low growth might be in future years;
- Flagging with businesses and investors the intentions of policy makers in relation to supporting population and economic futures (although this is more related to the substance around targets); and
- Establishing timeframes for the implementation and evaluation of related programs, initiatives and policies which are linked to the targets.

Specifically for the Territory targets are likely to generate discussions locally and nationally on population issues and factors which are different in the Territory, with a view to garnering greater understanding nationally by politicians and policy makers. In some circumstances targets might assist with negotiations in the Territory’s favour. As a hypothetical example, if realistic targets are set and these demonstrate that, even if met, the Territory would lose population share and consequently GST revenues, this might assist in discussions over GST distributions for the Territory. Targets can also be population-related and linked to overall population and economic strategies, rather than defined by population numbers or growth. For example, to help ‘bring back’ university students to the Territory, the Government might provide a certain number of ‘study away but come back’ scholarships for young Territorians.

Collectively, therefore, targets or initiatives integrated with an overall strategy are likely to engender a perception that government is taking population issues seriously, has clear directions and is supporting those directions with population and economic initiatives.

5.3 Population targets can be bad because...

In our earlier chapter on population and development strategies for internationally comparable places we found few had overt population policies or targets. Past national discussions on the right population size for Australia have revealed some of the reasons that governments at all levels tend to avoid setting very specific (for example a specific population number) targets.

Firstly, setting targets opens up debate on what the ‘right sized’ population is. Kevin Rudd’s advocacy in 2009 for a dramatic increase in the national population from 22 million to 36 million (the ‘Big Australia’ mantra) was met with a barrage of criticism from academics, environmentalists, transport and housing lobbyists, and many other groups. Criticisms focused on the high levels of overseas migration required to deliver 36 million by the year 2050 and the environmental effects associated with reaching a population that size. Popularist criticisms of high migration strategies usually suggest migrants take away jobs from ‘locals’ while sustainability and liveability arguments tend to focus on negative environmental impacts, water issues, congestion, housing shortages and general wariness.
about the ability of governments and the private sector (via public-private partnerships) to keep up with necessary infrastructure provision. These sorts of debates have tended to attract heated and polarised opinions from pro-immigration and pro-nationalist corners.

After replacing Rudd, in 2011 Julia Gillard denounced a ‘Big Australia’ in favour of a ‘Sustainable Australia’ position. The Gillard Government developed a “Sustainable Population Policy” and instigated a Minister for Sustainable Population (Tony Burke). This population policy was not accompanied by targets and indeed the Minister for Sustainable Population overtly stated there was no ‘magic number’ being promulgated by Government. Measures within the policy were all focused on jobs generation aside from one to ‘measure sustainability’. That policy became redundant after less than a year with the ministry absorbed into a broader portfolio and the title dropped.

The second possible negative consequence of setting population targets is that their existence may cultivate public perceptions that governments have the ability to lever the components of population change (fertility, mortality and migration) to adjust rates of growth in order to meet the stated targets. Aside from setting the overseas migration intake each year at the national level (with variable flow on effects to States and Territories according to various Federal-State/Territory agreements) this is not the case. Governments cannot, for example, coerce families into having children at particular points in time. As an example, family payments (including ‘baby bonuses’) have been shown not to increase fertility rates.

By setting stated targets and promoting initiatives towards reaching them, public perception may also turn to reflecting on why the government in question did not, given it seemingly had the levers, prevent unfavourable situations (for example, very low growth) in the past. The general public has poor awareness of how complex the factors which determine population change and growth are across space and time. While presenting targets may signal that government is decisive, taking action and ‘fixing’ issues such as low growth rates, targets by-proxy send the message that government is the ‘owner’ of the issue and should therefore be the one willing and able to fix it. In reality, governments, while playing a key role, are just one influencer of population change along with the private sector, national and global circumstances.

Aside from political facets, a third element in the negative is more technical by nature. Population targets are rarely met because, in the medium term, populations never grow and change precisely according to expectations or forecasts. Targets can therefore quickly become obsolete due changes in one or more of the trends which used to set assumptions. Based on the degree of difficulty in getting targets ‘right’, these can quickly be obsolete (unachievable) and render political implications. A good example is the recent Developing Northern Australia agenda in which the Australian Government proposed that the low population density in northern Australia was the key impediment to sizeable scaling-up of industry and economic activity. The subsequent White Paper on Developing Northern Australia (“Our North, Our Future”) features the dual targets of growing several cities to a size of more than one million residents (page 3) and growing the region to between four to five million residents by the year 2060 (page 4). Our analysis of these has found that the gap between the existing population sizes of the main cities and towns and that which would be required to reach the targets was an order of magnitude larger than even the most optimistic growth rates would produce, unless there was a mass influx of overseas migrants of around two million or forced movement of a similar number of people to the north. The rather fanciful aspirations in the White Paper regarding population size and distribution reflected badly on the Government’s knowledge about the reality of population issues in the north and, indeed, how populations change and grow. In addition, it was apparent immediately on release of the White Paper that the targets would not be met, which raises the question ‘Why have them in there?’
5.4 Our advice to Government

The discussion above suggests that setting a target number to be reached by a particular point in time may not be judicious because, in essence, meeting the target is unlikely. To a lesser extent, the same problems may surface if setting a growth rate is desired, although this can be phrased more broadly – for example, ‘we will aim to achieve an average growth rate higher than the 30 years average in the next five years’. Our advice to Government is to set either non-specific goals relating to desired population futures or to set targets within a range of outcomes, rather than specific outcomes. Goals might be set in relation to improving some life-stage based outcomes like the retention of existing residents in transition to retirement. Range based targets can be set in relation to almost any aspect of population futures, including around a desired future population size. An example of a range-based target is to increase the population to between 250,000 and 270,000 by the year 2027.

In either case, we suggest that goals or targets should state the following:

- What ‘market’ (for example, age group, life stage or origin of migrant) the goal or target relates to;
- The type of change sought (for example, higher growth rates, more than double the number); and
- What time period applies (for example, in the next ten years).

There should be identifiable strategies and outcomes which are linked to any targets or goals, as well as plans to evaluate their successes. Finally, Government should ensure that any goals or targets consider the locally produced population projections for the Territory so that the public do not receive contradictory messages.
6 Strategies for target market growth

Purpose of this Chapter:

In this chapter we identify the markets most likely to help turn the population situation around through targeted initiatives. We distinguish these based on the likely ‘return on investment’ from initiatives as either green (likely to yield good results from targeted initiatives), orange (possibly a good market to target) or red markets (unlikely to yield good results). Different markets are considered for attraction and retention initiatives. We also indicate the level of current knowledge about how these markets might be influenced with three stars for a high level of knowledge, two stars for moderate knowledge and one star for minimal knowledge.

Core Messages:

- We identify four ‘green’ markets for recruitment initiatives as:
  - International migrants (of specific types)
  - Return migrants (the ‘alumni’)
  - Late career workers
  - Early career women
- And two ‘green’ markets for retention initiatives as:
  - Older Territorians
  - International migrants (specifically the large and growing overseas born communities)
- ‘Orange’ retention markets include FIFO, seasonal and temporary workers, young professionals (especially women), and Indigenous Territorians while ‘Red’ markets are lifestyle migrants, young families with children and mid-career workers.
- No single market will be large enough to ‘solve’ the Territory’s population challenges, but combined moderate gains across multiple markets should have major cumulative impacts within ten years.

Key Action Items:

1. Design initiatives that attract or retain international migrants from fast-growing source countries and look into bringing more humanitarian and Pacific Labour migrants to the Territory.
2. The Territory should create an ‘alumni’ database with details of past residents. Information on opportunities to return to the Territory should be promoted via a communications strategy.
3. Attention should be paid to promoting opportunities to come (back) to the Territory at older working ages – promoting the availability of senior level jobs and project work, along with lifestyle factors.
4. The Territory should devise a campaign for attracting and retaining early career women, including ensuring that education, health, and recreation facilities are female friendly.
5. The Territory should actively promote pathways for Temporary Graduate visa holders to remain.
6. The Territory should target seasonally mobile retirees (‘grey nomads’) to make the Territory a home base and declare it as their primary residential address for Medicare.
7. More research is needed on how to target Indigenous Territorians, professional and knowledge workers, and workers transitioning from early to mid-career.
6.1 Proposed target markets for attraction and retention initiatives

In this chapter we discuss the markets we suggest are appropriate as targets for Government and other initiatives to encouraged improvements in their attraction and retention. Basic marketing theory describes a target market as a group of people considered likely to buy a good or service. In the case of the Territory’s population, target markets are those who might ‘buy’ initiatives or incentives to come to or stay in the Territory as residents. In the course of this report we have touched on a number of target markets whose migration intentions may be able to be influenced to make positive contributions to attraction and retention, and therefore population growth.

Recognising there are degrees of market alignment with the ‘product’ of coming to or staying in the Territory, we have identified target markets as either green markets (likely to yield good results from targeted initiatives – high prospects for return on investment), orange markets (moderate return on investment) or red markets (low return on investment given current conditions). Key markets are listed in Table 5 with their ‘traffic light’ indicator and with an accompanying one, two or three stars to indicate the depth of research-based knowledge which is available around which initiatives can be designed. The green markets we have identified for attraction include:

- International migrants
- Repeat dwellers (the Territory alumni)
- Late career workers
- Early career women

The green markets we have identified for retention include:

- Older people
- International migrants

The orange markets for attraction include:

- Seasonal and temporary workers
- FIFO workers

The orange markets for retention include:

- Residents in transition
- Young professionals (especially women)
- Indigenous residents

The red markets include lifestyle migrants for attraction and children with young families and mid-career workers for retention.
Table 5 – Summary indicators on target markets for growth in the Territory

<table>
<thead>
<tr>
<th>ATTRACTION/ RECRUITMENT</th>
<th>RETENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>*** International migrants</td>
<td>*** Older people</td>
</tr>
<tr>
<td>*** Repeat dwellers</td>
<td>*** Children/ young families</td>
</tr>
<tr>
<td>*** Late career workers</td>
<td>*** Residents ‘in transition’+</td>
</tr>
<tr>
<td>*** Early career women</td>
<td>** Young professionals (especially women)</td>
</tr>
<tr>
<td>** Seasonal and temporary workers (base here)</td>
<td>** Non-Darwin residents</td>
</tr>
<tr>
<td>* Lifestyle migrants</td>
<td>* Indigenous residents</td>
</tr>
<tr>
<td>* FIFO workers (convert or base here)</td>
<td>* Mid-career workers</td>
</tr>
<tr>
<td>* International migrants</td>
<td>* Out of work construction workers/ miners etc</td>
</tr>
</tbody>
</table>

+ For example, school to university, between career stages, making career changes etc

Notable in the table above are differing levels of knowledge about how to influence the target markets. For example, there is a global stream of literature outlining studies on factors attracting international migrants to particular locations, including our studies for the Territory (hence three stars for ‘recruitment’ knowledge); however, literature and studies on retaining international migrants in places like the Territory is less defined (hence just one star for retention). In addition, the ‘star ratings’ above are in part determined when research was most recently conducted which informs initiatives. In the case of international migrants, current growth markets to the Territory are different to those that were present when previous studies like our surveys with State Sponsored Regional Migration migrants were conducted (2013). Some targeted initiatives will require new research to ensure their effectiveness. In Chapter 8 we describe the research recommended for the target markets and outline some data related research, particularly with Medicare data, warranted for its potential to assist with official population estimates.

6.2 Targeting the ‘green’ markets

6.2.1 Targeting international migrants for recruitment and retention

Research in Australia and for similar countries shows regions like the Northern Territory may be a ‘stepping stone’ for some international migrants, creating ongoing leakages to southern areas. At the same time, migrant communities are growing quite rapidly in the Northern Territory and other places like it (see Section 1.3). We see the main opportunities for increasing international migrant recruitment is by leveraging existing residents who are part of growing overseas born communities in order to encourage chain migration (such as family migration) and/or encourage associated migration (for example, professionals encouraging others from their home communities to migrate by their social media posts). In Section 1.4 we identified the large and growing international communities as the Filipino, Indian, New Zealand, Nepalese and Chinese (for Darwin) communities. If growth rates from the past five years for the top ten source communities were to continue, 4,200 and 9,100 overseas born residents would be added to the population of Darwin over the next five and ten years respectively. For the rest of the Territory (where some overseas born communities are in decline) the gross additions would be 460 over the next five years and 1,700 over the next ten (although this assumes net outflows to interstate remain constant). While these numbers may seem relatively small, they are prominent incremental population gains and would more than compensate for recent declines in net overseas migration to the Territory.

Differing world views and religious practices amongst migrant communities mean, although some recruitment factors may be important and common to all, each community is likely to place different emphasis on recruitment
and retention factors. For example, religious tolerance, access to ex-patriate community networks and having a place of worship may be more prominent for those from India, while employment and housing are likely more important to those from New Zealand. Little nuanced research is available on such cultural specificities with a view to attracting more migrants to places like the Territory. We propose some new research in this area in Chapter 8.

The recently announced Pacific Labor Scheme will allow 2,000 people from the microstates of Nauru, Kiribati and Tuvalu to work in rural and regional parts of Australia in low or semi-skilled jobs for up to three years. The Northern Territory should seek to attract as many of these as possible, particularly given our similar climates. In addition, it has been suggested that numbers permitted under the Scheme will gradually increase with large out-migration from these jurisdictions anticipated during the coming decades. Gaining a large cohort of residents during the initial wave of 2,000 would place the Territory at an advantage for future intakes with the community having been established (with some likely to convert from the three-year temporary to permanent visas).

To some extent, recruiting international migrants to the Territory is determined by national migration policies. In the past the Territory has consistently received around one percent of the annual national quota. We have suggested earlier in this report that opportunities exist to negotiate with the Australian Government on refugee intakes to enhance recruitment. It is also not yet clear to the researchers how the new DAMA scheme and changes to skilled migration visa conditions will impact on international migration to the Territory.

One pathway to residency for international migrants which is not capped in terms of visa numbers is the Temporary Graduate visa (subclass 485). This subclass has two streams – the Graduate Work stream and the Post-Study Work stream. The former targets those who graduate with skills and qualifications on the list of skilled occupations in demand. Generally, these are granted for 18 months, but are currently in a state of flux due to regulatory changes. The Post-Study Work stream allows students who have graduated with Bachelor level or above higher education qualifications to apply to work in Australia for up to four years' residency (depending on their highest level of qualification obtained in Australia). There is potential to drive increased numbers of permanent migrants and grow the population of the Territory by encouraging overseas students to stay on and work after successful completion of their studies. Research-based knowledge about the motivations, pathways, drivers and barriers for students who may be considering the Post-Study Work stream visa is needed in order to develop initiatives to increase the number of migrants in the stream and to help convert those already in the stream to permanent residency.

We would also like to mention some current research conducted by one of our Master of Public Policy students, Anita Maertens, on the German born population of the Territory who exhibit high rates of retention, thereby ‘sticking’ in the Territory for the long term. This market has been shown in German studies to seek career opportunities and lifestyle in adventurous localities like the Territory (partly as a response to dissatisfaction with the lifestyle in Germany). This market may be a basis for growth in the German community in future (although it is relatively small at the moment at around 1,000 residents) and our research should provide clues about how to attract other adventure seeking markets with results available late in 2017.

6.2.2 Targeting repeat-dwellers for recruitment

The Deloitte and TMS studies analysed in Chapter 4 suggested almost half of people who had left the Territory stayed longer than they anticipated and few (only 7%) were dissatisfied with their time here. Of these, around 20% said they would or were likely to move back to the territory as repeat-dwellers. The average annual number of out-migrants from the Territory to interstate during the past five years has been 17,300, creating an enormous pool of potential repeat dwellers and word of mouth from these mostly very satisfied ‘customers’. We do not have data to indicate the actual percentage of repeat dwellers or multi-repeat, however even a small percentage can, as seen from these numbers, be significant. Targeting this group for increased actualisation of intentions could form part of an ongoing survey program as we have outlined in Chapter 8. One benefit of this market is that they are already aware of the many positive aspects of living in the Territory and place greater emphasis on lifestyle than other
migrants so might be ‘upsold’ on lifestyle features they were not previously aware of (for example, the opening of a new sporting facility or improved high speed broadband access).

6.2.3 Targeting late-career workers for attraction and older Territorians for retention

Pre-retirees and seniors are the fastest growing group in the Territory population. While we attract relatively few of these from outside of the Territory (although there is a caveat to this statement below in relation to late-career ‘escalator migrants’), the current ‘crop’ exists within our population and as such strategies to retain them are needed. As a market who have traditionally migrated out of the Territory at high rates, the age structure of the population in 2017 means that a progressively larger group is migrating out of the Territory each year (see Appendix 3). This pattern may be expected to continue given the anecdotal evidence of high rates of departures of long term Territorians who arrived to rebuild after Cyclone Tracy and during Self-Government (see also Section 7.5). Nevertheless, even if past rates of out-migration of this segment continue, the numbers of pre-retirees and seniors in the population will grow rapidly in coming years. If out-migration rates can be reduced, higher growth rates will be achieved. Growth in the senior’s population may help develop the number of intergenerational families and encourage more families to stay in the Territory after children are born.

Strategies can be informed by our research with COTA in 2013, however, we suggest new research is needed to more closely identify the characteristics of pre and post-retirees most likely to stay or be persuaded to stay since separate strategies focusing on cost of living in particular might be needed.

We earlier indicated the emergence of a pattern of escalator migration involving the recruitment of late-career ages (50 to 65 years) to the Territory. We first uncovered this phenomenon in the 2006 Census data with our colleague Catherine Martel. Because the escalating cohort was male dominated we suspected that people were coming to (or coming back to) the Territory to take advantage of employment prospects and high wages prior to retirement and that fishing was also a drawcard for some. We labelled the phenomenon the ‘Barramundi Effect’. Census data for 2016 shows this group has increased in size. In part this is to be expected given growth in pre-retirees nationally which also suggest there is potential for attracting more to the Territory.

6.2.4 Targeting early career women for recruitment

Early career women form a large part of inflows and outflows for the Territory. Recent migration data analysed in Chapter 1 shows an apparent and substantial drop-off in arrivals of these and an increase in departures in recent years. Spikes in out-migration around peak birth ages for non-Indigenous women in the Territory support the assumption that young families leave the Territory to be with family and support networks once a child is added to the family, and especially for the first child. This is the case nationally, however, with the Territory being at significant distance to major southern capitals, rates of departures are high. It is unlikely in the short to medium term that many young families can be influenced to change their decisions around post-birth residency. Studies suggest that, in the longer term, high quality education services (both school and post-school), competitive costs of living and good transport connections to southern capitals may assist in reducing out-migration.

Our prior research for Alice Springs has shown the dramatic impact the recruitment of skilled professionals can have on population change in a short period. The new international migrant communities we identified were led by the migration of primarily female health sector professionals who brought their partners. Accordingly, recruitment initiatives for early career women should be considered as a mechanism to replace some of the increase in the departure of young Territory families. Opportunities exist to recruit young professional and skilled workers (especially in the education and health sectors) because, while many might only come for a fixed period, some may become ‘sticky’ in the Territory for the same reasons that many leave – partnering, family formation and having children. Other industries which are increasing their female proportion in the workforce include defence, law and order and resource sectors.
6.3 Targeting the ‘orange’ markets

We have identified seasonal and temporary workers and FIFO workers as having some potential for improved recruitment through strategic marketing initiatives. For retention we identified residents in transition, young women, non-Darwin based Territory residents and Indigenous residents in Table 5 as the orange markets.

Seasonal and temporary workers are a feature of Territory employment markets and have increased in numbers over time. These include a mix of domestic and overseas workers (for example, Working Holiday Maker visa holders) whose numbers peak in the dry season. For domestic workers of this type, there may be opportunities to ‘convert’ some, over and above those who come for a short period and stay for the longer term, to residents through identified work or career pathways. Direct marketing through employers who engage temporary and seasonal workers might provide avenues to promote incentives or jobs. FIFO workers are also commonly transitioning into and around the Territory and initiatives for converting some of these to residents might be conceived and, likewise, marketed through industry. In addition, the Territory might push to become a hub for northern FIFO ‘floating’ workers. Both temporary workers and FIFO’s are likely to place high emphasis on work opportunities in the long term for converting them to residents (keeping in mind that only six months is required to become a resident, along with updating of their Medicare records).

On retention for orange markets, in Section 4.5 (particularly Figure 13) on Territory survivors we identified that survivorship rates drop off during the years (of age) where transitions between significant life and career stages commonly occur. Many of those transitioning will not be influenced to change their migration intentions – like those determined to study at a sandstone university or expectant mothers needing family support elsewhere. Nevertheless, some may be encouraged to make the transition whilst staying in the Territory through strategic initiatives like career work pathway schemes to transition early career government workers to more senior roles or positions (or just a new field or type of career). While the early to mid-career transition market is one of a number, it is by far the largest. Understanding the potential in this area would require more research on incentives and decision making processes around specific transitions which are likely to be quite different accordingly.

The average length of stay for people who have lived in multiple locations in the Territory is much higher than for those who lived in only one region. Considering those outside of Greater Darwin, there are at least two sub-markets which might be encouraged to move within the Territory rather than leave. First are those whose current employment contract is nearing an end. This group might include government and private sector workers in professional, managerial or administrative roles who are on fixed term contracts. The second are those subject to unforeseen ends to their employment in the Territory who are more likely to be in the resources, agricultural and/or semi-skilled roles. Strategies should be implemented to encourage people to transition to new jobs, contracts or career paths in the Territory. The most obvious sector to trial initiatives is in the public sector where they can be implemented and evaluated. Second, strategies might be adopted ahead of time (where known) to encourage some Territory residents who are out of work to move within the Territory. It is not immediately clear what schemes or programs might be effective in this regard, aside from informing people about available jobs elsewhere in the Territory and in similar occupations.

The improved retention of Indigenous residents might also be considered as an area for specific policy initiatives as the net loss to interstate is growing year on year. The likely reasons for out-migration from the Territory are explained in two pieces of research listed in Appendix 2. Like all populations, Indigenous people are urbanizing around the world. A range of other issues are at play including improving education outcomes, access to information communication technologies and personal devices and of course employment. However, there is almost no research on how the outflow from places like the Territory might be stemmed or how more people might be attracted back to places like the Territory.
6.4 Notes on the ‘red’ markets

The red markets are those who are unlikely to change their behaviors on a sufficient scale to help incrementally improve the Territory’s population position in spite of incentives, programs or policies which might be aimed at attracting or retaining them. The return on investment for these might therefore be anticipated as low. It may be that in future the red markets become more influential through changes to demographic, environmental or economic conditions but at the moment these include lifestyle migrants for attraction for whom knowledge of the Territory lifestyle is unlikely to alter migration behaviors significantly. For retention, the red markets are children and young families who are determined on being located near family and support networks outside of the Territory and mid-career workers in the Territory for a pre-determined and fixed amount of time.

Out migration of workers in the resource and construction sectors is a significant contributor to recent low population growth. However, reducing out migration of these may ultimately be very difficult. Three types of resource sector workers may contribute to population growth through targeted initiatives. The first is the retention of out of work resource sector workers already in the population and counted as such (i.e. have updated Medicare records and/or completed a Census here). The second are out of work or pending out of work resource workers not yet in the population count (for converting FIFO workers not already counted in the population to long term residents) and the third are seasonal or FIFO workers based in other parts of Australia who may be facing unemployment or are unemployed. It is not immediately clear what types of initiatives might work for these groups, however, as we experienced with the curtailment of the Nhulunbuy refinery (which led to the Territory’s worst ever net interstate migration position), the movements of resource sector workers across as well as to and from northern Australia are significant. The international experience is also that the majority of unemployed workers in these sectors migrate out of remote northern regions. Incentives may encourage some families in these situations in future to stay within the Territory, and thought might be given to enacting a ‘capture’ program across the north of Australia by identifying impending closures or wind-downs in resource sector jobs and pro-actively marketing the Territory lifestyle to potential new residents as well as job opportunities.

Similarly, construction workers in the three groups identified above might be targeted for ongoing or new residency in the Territory. A rolling series of big projects is one way in which an ongoing construction workforce can be secured locally, however, as the construction period for INPEX has demonstrated, workforce practices for large projects have changed and the proportion of locally sourced labour on the construction of projects is diminishing. This may also be due the scale of the INPEX project (i.e. so large that a substantial portion of the construction workforces simply had to be sourced from elsewhere). Prior big projects – commencing with Cullen Bay and including the Conoco Phillips plant and then the Darwin Waterfront Precinct all appear to have had positive impacts on population growth, or at least coincided with some recovery from a negative net interstate era (especially Conoco Phillips).

However, workforces in both the resource and construction sectors are highly male dominated and transient ‘job chasers’. A male dominated population (in 2011, 91% of construction workers in the Territory were males) is thought to contribute to high transience across all sectors and bring with it some impacts on the lifestyle and amenity of other residents (particularly young families). Again, these issues are common to northern populations where resources are one of the key sectors in the economy. Our observations (noting again we are not qualified economics practitioners) are that, aside from (somehow) generating a series of rolling construction projects over coming years, Government’s choices appear to be limited to examining ways to diversify the economy or, as we noted in relation to growth plans for other jurisdictions in Chapter 3, encourage smart specialization.
6.5 Summary

In summary, in this chapter we have identified key markets for attraction and retention for the development and application of targeted population initiatives. The most promising are:

- International migrants for attraction and retention including existing “growth” communities, students, refugees and German born people;
- Repeat dwellers for attraction;
- Early career women for attraction and retention;
- Older people including pre-retirees and seniors for retention; and
- Out of work construction or resource sector workers.

Additionally, some orange markets might also help with attraction or retention improvements, however for some there is a lack of research on how initiatives might be developed and targeted. In Chapter 8 we go into some detail on research which we think will help ensure the success of targeted in initiatives aimed primarily at ensuring initiatives for ‘green light’ markets are indeed targeted.
7 Global trends, technological changes and ‘owning’ the Territory’s population transience

Purpose of this Chapter:
In this chapter we discuss new ways to attract and retain people given global and technological trends as well as examining generating differences for population growth and ‘owning’ population transience.

Core Messages:

- Internationally, jurisdictions like the Northern Territory have relied on resource extractive activities (and particularly the related construction projects), national government transfers, and their role in national defence to underpin economic and population growth.

- Positive impacts from these drivers are being reducing due to shifting national priorities, increasing labour efficiencies in key industries, and increasing distances between the workplace and home. However, these ‘cornerstones’ offer new opportunities for the Territory to develop smaller scale resource projects with stronger Territory links, and more support services to mobile defence communities.

- Other global trends also present challenges and opportunities for the Territory including:
  - Climate change which may make the Territory less attractive to many domestic residents and contribute to increasing long haul travel costs, but may open up new streams of international migrants.
  - The trend towards more people living in increasingly large cities and making Territory regions less attractive for new migrants, but increasing the appeal of the Territory to other migrants.
  - The Territory’s proximity to parts of Asia will stimulate growth in some migrant markets, but ease of access to larger Australian cities will see many bypass the Territory altogether.
  - Older age of entry into and departure from the workforce may continue declines in migration of young adults to the Territory, but may grow opportunities for people to come as they change jobs later in life.
  - Labour market specialisation means fewer high skilled workers live where they work, and most live close to large cities, but technology developments might encourage some workers to be based in the Territory.

- A declining proportion of Australia’s Indigenous people live in the Territory, however, the Territory may be able to attract Indigenous Australians looking to increase their knowledge of Indigenous cultures and heritage.

- While the millennial generations seem to be moving away from places like the Territory, our large population in this age group (under 30 years) provides an opportunity to learn how to recruit and retain them.

- Population transience supports a range of Territory businesses, knowledge development and innovation but global and local trends suggest increasing mobility for most Territory target populations. This creates conditions for periods of high out-migration, but also exposes the Territory to a large ‘alumni’.

- The Territory can ‘own’ transience by providing positive experiences to a range of visitors and short term residents, positioning the Territory as ‘home base’ or a return port for mobile workers, and by using the skills and knowledge of even short term visitors to help Territorians develop professional and personal attributes.

Key Action Items:
1. Many local and global trends suggest increasing challenges in attracting and keeping people in the Territory. Ongoing research is needed to monitor trends and respond strategically before they occur.
2. The Territory should encourage positive aspects associated with these trends instead of expecting positive outcomes to accrue. Many of the recommendations made earlier in the report are based on this advice.
7.1 Introduction

A request in the Terms of Reference for this report was to discuss new ways to attract and retain people given global and technological trends, whether generational differences might play a role, and to reflect on how population transience might be ‘owned’ by Government and others. The possible scope for such considerations is far ranging and, as we have learnt from past experience, northern and remote places are often subject to rapid changes in population growth and composition; sometimes as a result of global and technological trends. In this Chapter part of our focus is on the ‘old ways’ in which northern economies and their workforces and populations have grown (their development paths). This provides clues as to what the ‘new ways’ might or might not be and how to position for these. We then look at several other global megatrends as well as generational matters as they relate to migration and attempt to synthesise how these might play out for the Territory. The reader should recognise that the authors are not qualified sociologists or technologists and so we lean on our research on the relationship of these to population change in places like the Territory.

7.2 Factors affecting traditional development strategies in ‘remote’ jurisdictions

Internationally, resource rich but relatively isolated jurisdictions like the Northern Territory have followed similar development paths. There has been a strong focus on natural resource developments – mining, energy projects, forestry, and fishing – which are accompanied by periods of high labour demand (particularly in the construction and expansion phases) and which sometimes are accompanied by manufacturing activities. The risks associated with these forms of development are well known. Resource activities are cyclical, both as a result of resource depletion and due to the vagaries of commodity markets. Large resource projects are typically owned and operated by companies headquartered outside of the jurisdiction, and those companies often have only weak ties to local communities, meaning that decisions about employment and investment are only minimally informed by social considerations. Large resource projects also typically rely on transport and other infrastructure that may (for example, Gove airport) or may not (for example, the Nhulunbuy port facility) be readily used by other parts of the community, and which are often heavily subsidised by government. Government also often assumes responsibility for environmental rehabilitation and other costs associated with changes in the activity. Nevertheless, resource projects have been drivers of economic growth (including direct economic income through royalty payments etc.) and, through employment creation, population growth. In the past, there have been few alternatives which offer anything approximating the potential economic and demographic stimulus that has come from resource projects. Consequently, the needs of other, smaller, but potentially less risky activities such as agriculture and tourism have taken a back seat to resource activities, or those alternatives have been shaped as large but isolated projects in themselves (for example the Ord River Scheme and the Uluru and Kakadu resort developments).

A second common avenue for development has been the transfer of funds from national to provincial or local governments. Remote jurisdictions like the Northern Territory have typically received shares of national government transfers far exceeding their share of the national population as compensation for their remoteness and challenges in service delivery. For some places, transfers also compensate for the additional costs of delivery services to Indigenous populations. Relatively large government bureaucracies and networks of government funded service providers have emerged in these remote jurisdictions as a result. They provide relatively stable employment despite some periods of rationalisation and changes in political and practical approaches to funding programs and activities. National government transfers are also often used to help remote jurisdictions subsidise or support construction projects which provide large but short term employment opportunities. These are subject to increasing labour efficiencies and the dislocation of place of work from place of residence as described above.

Remote jurisdictions have also received substantial investments from national defence institutions. Military bases, military training grounds and observation posts have been common landmarks in these jurisdictions for the entire
period of their colonisation. Defence activity has provided direct population (military personnel) and a range of spin-offs which stimulate economic and population growth.

Most of the jurisdictional development plans that we have reviewed during our research (particularly for the *Demography at the Edge* and *Settlements at the Edge* books) have assumed that these three activities – resource extraction, government transfers, and defence) will continue to drive remote economies, and that what is needed to smooth out peaks and troughs associated with investment cycles in these areas is relatively small contributions from service sectors such as tourism and advanced education, and an increase in local small business (retail, small manufacturing, ‘knowledge activities’) activity. There is some reason to believe, however, that the three ‘cornerstone’ activities will make ever diminishing contributions to remote economies, and that the near future will see a dramatic decrease in their contributions.

There has already been a substantial change in the organisation of defence forces in the Western world with an increase in attention towards internal security and a decrease in attention to border protection. Along with the introduction of increasingly sophisticated military technologies which increase the distance at which military activity can be managed and that calls upon specialist skills held by relatively few military personnel, these defence trends have generally seen military installations in remote areas downgraded, consolidated or closed. Those that remain have become more temporarily occupied (for training or short rotations), by a narrower range of personnel, and with fewer economic ties to local businesses. The Territory’s share of the national pool of defence jobs (where people are employed in the Defence industry and call the Territory home) has remained at 7% since 2001. However, although we will continue to see individual defence initiatives emerge in the north, the configurations of these will be substantially less impactful economically and demographically than in the past.

Globally, the relative volumes of national government transfers to remote jurisdictions has been decreasing both as a result of decreasing shares of population in those jurisdictions and political pressure from other jurisdictions concerned about an uneven distribution of national income. This has, of course, been a major topic of debate in Australia for several years now, and the Northern Territory is threatened by its own process of demographic change (reduced share of national population, and particularly its share of the national Indigenous population), demographic change in other Australian jurisdictions (notably population ageing), and a decreasing ‘power to persuade’ because of its (demographically related) lack of political representation. The Developing Northern Australia agenda may also have negative consequences for the Northern Territory, as national government approaches to development and support become more standardised across the three northern jurisdictions. The agenda essentially creates a new regional layer of administration within Queensland and Western Australia which allows for the argument that more previously held State responsibilities (in relation to Indigenous development, for example) should be taken up by the national government, similar to what has traditionally occurred in the Territory. Some reflection of this may be seen in Europe, where similar processes of reshaping political geography within nation-states and provinces (the LEADER program, the Northern Periphery and Arctic Programmes, for example) have brought mixed benefits to remote jurisdictions and increased the competition between regions wanting to be seen as requiring additional support for development. In addition, progressively more people engaged in the activities supported by government funds committed to remote regions have based themselves outside of those regions.

There is a clear distinction globally between resource projects with high labour demand (which are mostly found in lower income countries) and those with low labour demand. The global trend is towards more of the latter, with technology replacing jobs and facilitating increased dislocations between the place of work (in the remote area) and the place of residence (in large cities which may or may not even be in the same country). Even the nature of fly-in/ fly-out work has begun to change, with fewer workers on regular rotations to the same sites, and an increasing number of workers rotating between multiple sites. Therefore, the overall volume of workers has declined, the number of those workers who would have any regular contact with the remote location has declined, and opportunities for visiting workers to develop strong local ties have likewise declined. Resource companies have also attempted to centralise their FIFO workforces to reduce costs of deployment, meaning that competition to
become ‘hubs’ for these workforces has increased. Even the periods of intensive labour activity associated with resource projects have become shorter as technologies to assist construction and expansion have improved. In addition, localised manufacturing associated with activities like mining and forestry has become less common as manufacturing facilities are centralised and moved to lower labour cost countries.

While trends influencing the three traditional ‘cornerstones’ of northern development (resource projects, national government transfers, defence) have been have been described here as essentially negative in terms of economic and population impacts, there are some potentially positive changes also taking place. Jurisdictions who can position themselves to compete for national (and trans-national) grants and project funding can attract substantially greater investments than in the past. We have seen this in particular parts of northern Europe where local government has been able to effectively partner with industry and European agencies to attract investment that provincial and national governments would not have considered for those places. The Developing Northern Australia Agenda may offer similar opportunities if the Northern Territory can engage industry partners in its development objectives (including for R&D with the CRC for Developing Northern Australia, for example). The Northern Territory may be able to position itself to attract funds to contribute to south-east Asian development objectives of trans-national organisations built up around trade and other treaties in the region. Likewise, defence cooperation with Timor Leste, Indonesia, and the United States provide avenues for the Northern Territory to continue (and even enhance) its role in defence activities in the north.

While improved resource extractive technologies have meant increased labour efficiencies and fewer benefits for the sites of extraction, they have also facilitated smaller scale developments and the development of what might previously have been considered as marginal resources. For the Northern Territory, this not only means increased opportunities for small scale mining, but also energy production. Lessons learned in how to engage in development at smaller scales may also prove useful for the expansion of the agricultural sector, among others. Smaller scale developments tend to be more closely linked to local communities, providing local employment and having more senior staff permanently (or frequently) located near the site of extraction. They may therefore be less risky investments than the large scale operations which have dominated in the past.

The decreasing certainty over the relationship between traditional forms of economic development and prospects for population growth in remote jurisdictions may also open up opportunities for a more diversified approach to economic development and subsequently more sustainable long term population growth, at the expense of occasional ‘boom’ periods. Not only might the freeing of resources previously committed to support large scale projects (in resource extraction and defence) allow for increased investment in other industries, but it might stimulate more growth from within, with locally based and managed businesses making greater contributions to jobs creation and local skills development. There may be opportunities to consider different forms of land use (for tourism, for small scale manufacturing, for universities, innovation parks and the like) which engage new and emerging industries and embed their activities locally. A more internally driven economy would also increase the perceived liveability of the region as residents make greater personal commitments to remaining here.

Despite this discussion, there is little doubt that the three cornerstones will continue to be critically important for the Territory’s economic and demographic future. However, demographic returns on investment at least are likely to continue to diminish, periods of demographic ‘bust’ will be deeper and longer, and ‘booms’ are likely to be lesser in size and shorter than in the past. A long term population policy for the Territory must consider how alternative approaches to economic development might be used to at least compensate for the diminishing returns from the cornerstones.

This section has described some ‘remote specific’ trends associated with the typical ‘remote’ development strategies of the past, but there are also implications arising from broader global trends (often referred to as ‘megatrends’). The intertwining of these local and global trends has already played a significant part in shaping the current Northern Territory population ‘slump’, and will become increasingly influential in the next two or three decades.
7.3 Other global megatrends and the future for migration

7.3.1 Climate and natural environment change

In coming decades, the climate of northern Australia is forecast to become hotter with increased occurrences of natural disasters and extreme events. A warmer climate is likely to deter some potential migrants and, with it already appearing as a reason for leaving the Territory for some groups, its negative influence on retention is likely to grow. The probability of more extreme events correspondingly does not bode well for efforts which might focus on lowering perceptions about the risks associated with migrating to the Territory – providing essentially one more reason for people (especially risk averse families) not to come. Nevertheless, some positive aspects can be imagined such as opportunities for developing innovation hubs and a skilled workforce around dealing with climate change in tropical or arid regions (for example, new building materials and structures; rapid response teams and so on). Perhaps the biggest opportunity coming from climate change, although difficult to realise politically and practically, is the possible of resettling mass displaced migrants into the Territory, and particularly those from Micronesian islands. On the whole, however, it is difficult to imagine the net outcome for migration in the Territory resulting from climate change will be positive.

7.3.2 Global instability including threats to the ease of, affordability and attractiveness of long distance air travel

Global instability in the form of terrorism strikes, political tensions and rhetoric around military action (or actual military conflict) are known to affect the mobility of people to and from destinations considered to be at risk (for example post-disaster events and tourism numbers). Assuming present day trends in terrorist actions aimed at Western populations continue and with an international defence presence in and near to the Territory, perceptions of risk associated with moving to or living in the Territory, particularly for families who are relatively risk averse may be influenced. Similarly, interstate (and overseas) migrants to the Territory (as well as short term visitors) are highly focused on air travel, including for visiting friends and family ‘down south’ after having moved here. There is a case to be made that air travel at current relative prices cannot be sustained for more than ten or twenty years given global trends in security, insurance, concerns about climate change, and fuel prices. This is likely to affect existing mature markets while growth markets like China, Indonesia and India are likely to carry on for some time.

7.3.3 Macro-urbanisation: increasing agglomeration of people in the largest population centres at the expense of smaller centres

The world’s population is rapidly becoming focused into mega cities, and in those nations currently without cities of 7-10 million residents or more, in the largest three to five cities. Australia is the most urbanised nation proportionally and long term processes are well entrenched across the country, including in the north. These trends place an increasing proportion of global populations at a distance to northern and remote areas of developed nations, further erode their population share, and reduce their competitiveness for attracting and retaining international migrants. In theory there may be also benefits like economies of scale for the recruitment of migrants to places like the Northern Territory through targeted saturation marketing into large cities. In line with the macro trend, out-migrating northern residents are increasingly likely to move to large cities and may spread a positive word of mouth and/or return as repeat migrants into the future. Unfortunately, however, global urbanisation is an inhibitor to peripheral population and economic growth, especially if reduced numbers are willing to engage with peripheral places over time. Within peripheral regions, urbanisation is creating the sorts of effects we see in the Territory at the moment where the large city is growing but the rest is not, further concentrating labour, capital and political power into the larger centres.
7.3.4 The growth of Asia

It has long been mooted, including in the latest version of the northern development agenda, that Asia holds the key to what ‘must be’ a bright economic and demographic future. Arguments focus on the gravitas of the absolute size of the Asian population (market demand), its near geographic reach (especially to the Territory) and its growing middle-class cohort (market supply – tourism and so on). However, the gaps between aspirational statements in this regard and the capacity for policy and industry to lever Asian markets for products and services, for tourists and for migrants to move to the north in order to smooth out population, economic and tourism volatility and fluctuations (for example seasonal) are clearly evident. There is little or no indication that the growth in the Asian middle class has positively affected northern economies to the extent that is proffered in development agendas, aside from selected hotspots temporarily benefiting from resource booms (for example the Pilbara from Iron Ore) through increased demand from Asia.

For the Territory, the latest negative population growth era is more prolonged and entrenched than any prior in spite of the ‘Asian Century’. Nevertheless, there is some evidence in the Territory that a growing middle-class may assist communities to stabilise their population, as the Alice Springs case suggests. This highlights that very targeted approaches focusing on specific and identified community needs (for example, we need 2 radiologists, 4 GPs and 15 nurses) are the key to tapping in to Asia for the purpose of migration. While the tourist market to the Northern Territory from Asian nations has grown, this has not led directly to positive population outcomes and, in the meantime, other markets have fallen off (most central European markets and some Asian markets like Japanese tourists). Part of the reason is that every nation, region and sub-region has focused on Asia as the key to their futures, but not all regions will or can realise and capitalize on this potential. Technological change, particularly in transport, and the continued relatively fast growth of Australian cities, means Asian products can reach Sydney, Melbourne and Brisbane in less time than northern centres because of the connectivity and distribution systems built around economies of scale. Similarly, product distribution to Asia in Australia occurs almost exclusively from southern cities, aside from resources shipped directly. While contentious, there may be more of a net long term positive outcome from identifying niche opportunities for population growth from attracting Asian residents to live in the Territory – as the very direct and targeted actions taken to recruit health professionals from Kerala to Alice Springs show.

7.3.5 Ageing and older age of workforce entry and exit

Population ageing is a global phenomenon which, while bringing many social and other benefits, means the ratio of workforce to non-workforce aged population is diminishing. For the Northern Territory, where in-migration is heavily concentrated in the early and mid-career life stages, ageing in Australia may not necessarily reduce the absolute size of the migration market (assuming continued growth in workforce aged population) but may reduce the proportion of the national population which is mobile through interstate migration and affect the source and destination balances we noted in an earlier chapter. This is because older people tend to move around less. For example, Tasmania now has a relatively old population which may affect the success of initiatives for attraction to the Territory because, for example, mid-career life staggers may not want to leave their extended family networks. The Territory population is also ageing with increasing pace (albeit from a small base) and it will be important to retain seniors (as one of our ‘green light’ markets) to increase intergenerational family numbers and retain their social and financial capital.

7.3.6 Changing work-life balance aspirations

The changed nature and timing of career engagement with other life stages, and growth in workforce casualisation is helping to produce a more mobile and transient workforce. In particular, the desire for women to balance careers with family formation and parenting is (while arguably a long way to go) are far better accommodated in
today’s society and workforce practices. It has been difficult to introduce flexible working arrangements in many cases in the Territory. For example, research by our colleague Katharina Voit showed that older nurses often left the Territory because they could not arrange job sharing or other flexible working arrangements, particularly in remote communities. On the other hand, the Territory does offer flexible employment arrangements for many groups (particularly in the public sector) through a variety of contracting arrangements. More and more, however, these involve people who reside outside of the Territory but are employed by governments and other Territory based employers.

7.3.7 Mechanisation and specialisation of labour markets leading to smaller, more mobile and more highly skilled labour forces

As we noted earlier in the chapter, labour markets for key industries in the north of the country including defence and the resource sector are now organised differently to the past. Mechanisation facilitated by technology change enables companies to maintain a smaller and more mobile workforce. Many draw them from large cities in southern Australia – such as FIFO workers for the construction of major projects in the north. Meanwhile, operations for major projects are increasingly specialised and technology driven such that the ‘on the ground’ population benefits are less than in the past. As social debate around machines replacing humans has emphasised, this is a trend likely to impact all sectors of the economy, with companies no doubt likely to focus efforts towards high cost operations in places like northern Australia. Conversely to the rather negative outlook in this regard, technology might reduce costs for operations in northern jurisdictions to the extent that new operations or increased scales in existing operations may be realised. Examples include individual mines which were not feasible in the past. On the whole, however, this trend is expected to work against efforts to increase population in the north of the country, including for the Territory.

7.3.8 Indigenous identification and other changes to Indigenous demographies

One of the major population trends in Australia in the past twenty years has been prolific growth in Indigenous Australians recorded in official population estimates. While growth continues in the north of Australia, it has been spectacularly high in southern cities and their surrounds. This is a result of complex sociological, historical, legal and other factors shown progressively encourage more Australians with Indigenous heritage to declare so in official data collections when previously (for example last Census five years ago) they did not. Our research shows one of the main groups are parents declaring their children as Indigenous when in the past they did not. Unfortunately, this long term trend has reduced the Territory’s share of the national Indigenous population by half, from more than 18% in 1981 to just above 9% in 2016. There is a strong financial impact for the Territory in the form of reduced GST revenues relative to other States. We understand that extensive efforts are being made by NTDTF and NTDCM to negotiate improvements to the Horizontal Fiscal Equalisation Scheme given this trend. While any changes will not directly increase the Territory’s population, they may enable Government to spend more on services and infrastructure for Indigenous Territorians and others, thus helping with attraction and retention over the long term.

A further aspect of Indigenous demography in the long term is whether there is or will be a ‘demographic transition’ which sees gaps in birth and death rates equilise with other populations. Already, Indigenous life expectancies have increased greatly (especially since the 1970s) and birth rates have fallen. Ordinarily demographic transitions produce periods of very high population growth as death rates tend to fall before birth rates. The impacts for the Territory population might be quite positive, not only from growth within, but perhaps for attracting Indigenous migrants to the Territory from the rapidly growing population in southern Australia. However, demographic transitions are increasingly compressed into shorter time periods compared to during post-industrialisation when European nations transitioned.
7.4 Generational trends and considerations

While there is some debate in this area, the advent of a new generation is said to have occurred when the ways in which different cohorts like to receive and process information, plan for their futures and enact major decisions like migration choices have been shown to vary. For example, later generations of Gen Y (or Millennials, born between 1977 and 1995 and now aged 22 to 40 years) and Gen Z (or the iGen, born after 1996 and now aged 21 and below) are thought to be globally focused and potentially willing to work from ‘anywhere’ with the assistance of technology. This raises the question on whether the Territory might be able to attract and retain more people from the Millennials or iGen generations by appealing to their characteristics and needs, then marketing the Territory as a place which meets these.

The label Millennials is sometimes applied to both Gen Y and Gen Z because of their common preference for highly technologically, globally and visually influenced lives. The main difference between the two is usually described as a much greater integration and use of technology by Gen Z, who one source has described as:

Gen Z is part of a generation that is global, social, visual and technological. They are the most connected, educated and sophisticated generation ever. They are the up-agers, with influence beyond their years. They are the tweens, the teens, the youth and young adults of our global society. They are the early adopters, the brand influencers, the social media drivers, the pop-culture leaders. They comprise nearly 2 billion people globally, and they don’t just represent the future, they’re creating it.

Gen Z’s have been born into the crisis period of terrorism, the global recession and climate change. They are predicted to spend their young adult years in a time of economic and social renewal. They are also living in an era of changing household structures, and are the students of today and university graduates, employees and consumers of tomorrow.


Analysis of the generational distributions in the Territory population compared to the Cairns region (SA4) for its northern location and to Australia as a whole shows the Territory’s proportion who are Gen Z and Millennials (especially) is higher, while the proportion of Baby Boomers (1946 to 1964) and Traditionalists (those born in 1945 or before) are far lower in the Territory. Generation X (now aged between 41 and 52 years) is comparable to other jurisdictions at around 15% of the population (Figure 15). These distributions for the Territory are more a reflection of the prior population age and gender structure, migration patterns and the high Indigenous composition in the population than the Territory’s ability to attract and keep the modern generations. In fact, data in Appendix 3 suggests (notwithstanding possible issues with Medicare and other official data records) there has been a weakening in the ability for the Territory to attract and retain Gen Y and Gen Z in the past few years. The general trend of net in-migration of early career workers and net out migration of mid and late career workers is also evident in the Territory’s generational distribution in 2016; as is a ‘deficit’ of older generations which reflects the ‘failure’ of pre-retirees to transition to post-retirement and old age in the Territory.
In theory, the ‘market’ for older generations is large and growing on a national basis, yet, as we have discussed in prior chapters (and aside from late career escalator migrants) older people’s migration rates are very low compared to the working age population. Taking cues from generational preferences and motivators might assist in bringing some older migrants to remote places in larger numbers. Appealing to those generations desire for a sense of purpose and preference for hands on productive activities seems to offer the best hope. We are aware, through our past research on desert tourism, of volunteer programs where ‘Grey Nomads’ assist with projects and activities at remote Indigenous communities. While not many are likely to end up as Territory residents, their word of mouth (assuming their experience is good) may help some others decide to move to the Territory. This is only one example of the sorts of programs which appeal to older generations and might be considered for support, development or more widespread marketing.

While the proportion of Australia’s younger generations is lower than in the Territory, their absolute size warrants some consideration in relation to whether appealing to generational preferences might attract more to the Territory than would have otherwise come. Gen Z and Gen Y are high tech generations who savour multi-modal, interactive and e-learning for education and training, and are influenced primarily by user-generated forums. It may be that a marketing program using the word of mouth of other Gen Z and Gen Y in migrants to the Territory to promote a move to the Territory might encourage some to migrate, particularly if impending job announcements can be made at the same time. Designing ‘outreach’ to these generations through user forums will require the engagement of marketing and social media experts. Technology based outreach may provide relatively low-cost benefits, however evaluating success will be difficult, requiring research with those influenced to come and those
who could not be influenced but engaged with the marketing messages (the latter would be very difficult group to recruit for research).

On the whole, therefore, looking to grow the Territory population based on leveraging the preferences and drivers of modern generations does not offer much in the way of new insights or opportunities for policy and initiatives; at least not without some considerable research to inform it. Rather, generational composition is a function of Territory’s past population composition, migration patterns and our Indigenous heritage. We see there is more to be gained by focusing on influencing the markets identified in Chapter 6, and with emphasis on changing behaviors at key life stages, rather than focusing on socially constructed generational shifts.

7.5 The departure of the ‘Territory Builders’ of the 70s

A specific generational shift may also be underway in the Territory. There is presently a large group of Territory residents transitioning towards retirement. Anecdotally many of these are long time Territory residents who may have arrived after Cyclone Tracy and self-Government to work on building the Territory. Their preference was to commit to the long term in the Territory. However, the replacement residents for those who leave on retirement are less likely to be committed to a long stay in the Territory (at least not the 30-40 year stay of those who remained to retirement having arrived in the 1970s). This presents a challenge for population turnover in the near future the costs of such turnover will be felt by businesses and governments.

7.6 Owning the Territory’s transience

The Terms of Reference for this report specifically ask us to consider how the Territory might ‘own’ the reality of population transience. This is a key consideration for many of the comparative jurisdictions we have discussed in this report. The ‘alumni’ approach is emerging as the key strategy to benefit from increasing population mobility for many of the Territory’s ‘core’ markets (early career workers, workers in construction and resources sectors, contract and seasonal workers, international migrants). The ‘alumni’ strategy, which has been discussed a number of times in the report, is not just about encouraging previous residents to return to the Territory, but facilitating as many opportunities as possible for people to visit the Territory – as students, tourists, conference attendees, professional visitors, researchers, project workers – and develop an interest in either returning themselves for a longer period or promoting the Territory to their colleagues and social networks. Substantial research has been done in the health sector to show that upwards of two thirds of professionals working in rural and remote locations had prior contact with that location (typically as a student). Research has also shown that word of mouth recommendations are one of the more important factors in having people who are somewhat interested in moving to a rural or remote location make the decision to actually move. Finally, while population turnover has negative financial implications (costs of recruiting and training new staff, for example) for some stakeholders, it provides financial opportunities for other stakeholders such as those in the real estate and transport sectors. Research in Tasmania has suggested that it is economically preferable to have a negative population growth arising from high numbers of migrants in and out of the jurisdiction than to have the same negative growth accompanying low population turnover. The Territory can ‘own’ transience by encouraging locals and local companies to host students, professional and other visitors, and by engaging those visitors as ‘alumni’ through social media and other communication networks.
8 New research and addressing existing data issues

Purpose of this Chapter:
Chapter 8 is about proposed research and communications or promotion activities to support the action items listed in other chapters of this report, and to generate new and contemporary knowledge on which to base ongoing Territory population-related strategies. We also provide scoping for ongoing surveys on attraction and retention as requested in the Terms of Reference.

Core Messages
- For initiatives on population and retention to gain traction and be as successful as possible, a number of new research activities are required. In addition, investigations on aspects of the quality of data related to official population estimates for the Territory (especially Medicare records) are needed.

Key Action Items:
1. A series of focus groups should be undertaken with the growing international migrant communities identified in this report (Filipino, Indian, New Zealand and Nepalese communities to begin with) to identify factors that could contribute to increased recruitment and retention.
2. Research should be done with retiring and newly retired Territorians who are considering leaving the Territory to identify what might make them decide to stay.
3. An online survey of Territory ‘alumni’ should be conducted to identify when and why they may be interested in moving back to the Territory.
4. A ‘welcome pack’ should be developed for newly arrived interstate migrants both to encourage them to update Medicare and other records, and to lead them to an online and ongoing survey to track their experience of embedding themselves in the Territory in the first five years of their stay.
5. This should be coupled with a rolling survey of Territorians and annual focus groups to monitor how attitudes to living in the Territory change and to evaluate the impact of strategies implemented under the population policy.
6. Research is urgently needed to establish the extent of miss-enrolment in Medicare for its impact on official Territory population estimates including for sub-populations such as young families with children.
7. Results of research projects should be distributed to the broader community through regular e-updates.
8.1 Introduction

In this chapter we propose new research initiatives to help plan for and ensure the success of strategic market initiatives which Government might consider. We also discuss issues with key data sets for their capacity to help improve official population estimates. Finally, we outline the possible scope and methods for an ongoing program of surveys for attraction and retention in the Territory, as requested in the Terms of Reference.

8.2 One-off research to support Market Orientated Population Interventions

In this section we focus on new research we see as important for designing targeted strategies for the green markets in particular. These are international migrants (attraction and retention), pre-retirees and seniors (retention), Territory alumni (or repeat dwellers – for attraction).

8.2.1 International migrants

We suggest focus groups be run in 2018 with individual communities (Filipino, Indian, New Zealand and Nepalese communities to begin with) and their representatives for the growing migrant communities in Darwin and the rest of the NT. The aim is to garner a deep understanding of community perceptions on how to grow recruitment and increase retention. Research would provide the basis for direct marketing and roadshows into growth countries. This research should be independent of Government to avoid perceptions by participants that certain responses or answers may be requisite because of visa, cultural or other reasons (a problem we have encountered in past research). We recommend two focus groups with each community. The aim of the first is to build relationships and trust, understand key factors for attraction, retention and migration and begin to design a high level strategy for targeting more overseas migrants from each community. At the end of the first focus group, participants would be asked to discuss several issues within their communities over the course of a few weeks before reporting back to a second focus group.

Census data can illuminate whether people from specific areas within source countries have clustered in the Territory. For example, the large growth in the Indian community in Alice Springs was driven by people from the state of Kerala. Uncovering clusters in the focus groups or in Census data would provide much better targeting for initiatives and strategies to recruit more from each country. The project findings might be promoted as a celebration of individual communities with the reporting back of findings to the community at a community event or meeting.

In terms of the retention of overseas born Territorians, research shows the initial settling period is crucial in establishing longevity in the population for international migrants. The focus groups might be used to gain knowledge about key factors for each overseas community, however, common factors appear to be feeling welcomed, feeling safe, a perception of good education and a match between employment and skills. We suggest international migrant welcome ‘packs’ are developed for the main growth communities with a broad range of information and a gift of some sort (for example, a 50% discount on the first power bill). For established overseas residents, support for cultural activities and festivals may produce gains as well as continuing to work on cost of living issues in the long run.

8.2.2 Territory seniors

Some clues about retention for this market were provided by our analysis of the COTA NT/ CDU survey in 2013 and our colleague Ilonka Guse (a PhD student) is examining how retirement intentions are influenced by place (comparing the Territory to other less remote places) as well as the influence of superannuation scheme changes. We suggest new studies of around three months’ duration are conducted in the near term in the form of a survey...
and focus groups with highly targeted questions on intentions and characteristics to separate those who have already made up their mind to leave, and obtain insights on incentives and initiatives which might encourage those undecided or at the moment thinking they will stay, to do so. This project also could draw on the knowledge of peak NGOs including COTA Territory and NTCOSS, and be supplemented by detailed analysis of new data as it comes to hand. All research relating to older Territorians should include consideration of the particular circumstances of the Territory Builders (section 7.5).

8.2.3 Targeting and staying in touch with Territory alumni

While jobs are the main factor sighted by Territory alumni for returning to the Territory, compared to other markets this group rates the lifestyle and pre-existing social or family networks as relatively more important. The primary life stages are career workers, young families and pre-retirees. Repeat dwellers may be a source for future growth through targeted strategies focusing on the Territory lifestyle, education and career development opportunities. We therefore recommend the development of a program for staying in touch with Territory alumni (both interstate sourced and overseas sourced, previously resident and visitors) for the purpose of marketing or incentivizing a return to the Territory as residents. Growing a database of emails or social media profiles will enable targeted marketing to a progressively larger audience in future and the announcement of key Territory lifestyle developments (for example if a new water park opens). Consideration will need to be given as to the efficacy and procedures. One option is to incorporate a process for staying in touch into ‘Welcome to the Territory’ initiative we have proposed below.

8.2.4 Targeting new interstate migrants for retention with ‘Welcome to the Territory’

We suggest that a further initiative which may work across all markets to assist with retention to roll-out of *Welcome to the Territory* packs featuring incentives and advice on updating Medicare records (see below) and provided to people at key touchpoints. Touchpoints for distribution might include:

- Changing the registration of a vehicle from interstate to the Territory;
- Obtaining a Territory driving license when the prior license was from interstate or overseas;
- Purchasing a dwelling (i.e. through the Department of Lands);
- Applying for public housing with Territory Housing while providing evidence of having lived interstate recently; and
- Other touchpoints where it can be established that the individual may have recently moved from interstate or overseas.

Procedurally, this will require staff at these organisations to be trained to assess the likelihood that the customer has recently arrived from interstate or overseas and to ask such customers “Have you recently arrived to live in the Territory?” If yes, staff should ask customers “Can you please ensure you have updated your address with Medicare. There are instructions on the brochure in this welcome pack which we have for you here?” An incentive program is likely needed to encourage people to actively update their Medicare records. An opt-out email address should also be collected for the purpose of ‘staying in touch’ with those who leave the Territory as we now discuss. The aim of welcome packs is also to make new arrivals feel like ‘somebody cares’ that they are now in the Territory and this is likely to assist with retention for some markets. Much more thought needs to be given to how such a program would operationalize and the contents of the pack (it might be a virtual welcome pack, for example).
8.3 Research to improve official population estimates

8.3.1 Improving Territory Medicare records

In this report we have indicated that there may be inaccuracies around Territory Medicare records, specifically the completeness and accuracy of records for children under 15 years and for their parents or caregivers. This is a long standing issue, however, the very large recent drop-off in arrivals for those aged less than 15 years (see Appendix 3) has coincided with the implementation of Medicare claims at medical practices for the majority of claims. Previously claims were made in person at Medicare offices with officers asking customers their current address and updating accordingly. Under the claim-from-doctor system customers are not necessarily asked their current address. We suspect that some slippage in Medicare accuracy may have occurred as a result of the altered claim procedures and due to a general lack of impetus for families to change their records if they are in the Territory for a relatively short time (for example, one to two years). This indicates there may be opportunities to positively influence official population estimates by encouraging young families in particular to update their records and by robust analysis on Medicare data quality issues.

The methods for this work would include examination of Medicare data and a survey of young families to assess the level of accuracy of Medicare data and scope out initiatives or incentives to encourage individuals and families to update their Medicare records and include all children and family. Having examined Medicare data in the past, CDU researchers are in a position to undertake this project in 2018, most likely in collaboration with NTDTF who have likewise undertaken analyses of the data in the past. It should be noted that obtaining Medicare data has previously been very difficult. Nevertheless, there is some potential for immediate gains through this proposed project (notwithstanding the need to influence the ABS to incorporate the findings, where appropriate, in their estimation processes). At the very least, should data quality issues surface as anticipated in the research, this would provide the Government with impetus for negotiations with the Commonwealth and its departments.

8.3.2 Census data counts and Estimated Resident Population Counts

For the 2016 Census, the ABS have provided a far greater level of detail and information than in the past on the quality of Census data and processes for deriving (official) population estimates (ERPs). Consequently we have been able to undertake thorough examinations on the quality of data for the Territory, led by Tony Barnes. The analysis has demonstrated there is a need for stakeholders in the Territory to work with the ABS to identify the implications of Census counts for ERPS for the Territory and its regions or towns.

8.4 Options for ongoing surveys on attraction and retention

In the Terms of Reference for this report was a request to outline options for regular surveys on attraction and retention which might be run by Government or others to monitor potation flows. Almost all of the research proposed above for enabling targeted recruitment and retention for markets is non-ongoing. An ongoing survey program would provide Government with research based information at hand on the relationships between changing economic and population conditions, and facilitate pre-emptive action where patterns are established. It should be noted that population ‘flows’ can be monitored using ABS data – for example see Appendix 3. CDU demographers currently produce a quarterly Territory Population Update based on these data and release it on their blog page (demographyNorth). This key aim for an ongoing survey program would therefore be attaining deep knowledge from people who have lived in the Territory, people who live in the Territory and people who have stayed in the Territory for some time in order to enact policy and initiatives to improve recruitment and retention through the knowledge built up from the surveys.
The ideal scope for surveys is an ongoing and relatively large repeated cross-sectional (ie with a different sample each time) survey with consideration given to supplementation by focus groups to unpack significant findings. Key features for a longitudinal study of this nature would be:

- Rolling bi-annual surveys conducted in the middle of the year and late in the year to account for the different population make-up and migration flows;
- A sample which includes Territory residents in all major towns;
- A modularised approach with different survey instruments for each target participant group;
- Focus groups to gain in depth understanding about key trends detected through the surveys and to obtain feedback on proposed Government initiatives;
- Inclusive of data which leads to a much greater understanding of migration intentions as they relate to key life stage transitions; and
- Results of the research should be distributed to the broader community through regular e-updates.

The scope of the surveys could potentially range from a relatively small survey program with a relatively small sample and fewer topics (therefore fewer questions) to a large survey program with a large sample and more topics. The scale of surveys will in part be determined by whether there is a desire to deliver lower margins of error for the results (also known as confidence intervals). These are a measure of how well survey results are likely to reflect the views of the overall population. The main factor which improves (statistical) confidence in survey data is the sample size, which also determines the length of time needed for each iteration of the survey (ie it usually takes longer to get a larger number of completed surveys) and the costs. All of these parameters can be readily calculated.

The range of surveys and sample sizes is almost unlimited. In Table 6 we have listed ‘modules’ and topics which might be considered for a smaller version of ongoing surveys on attraction and retention compared to a much larger version. This is mainly to indicate the range of possibilities for sample size and topics.

**Table 6 - Indicative components and scope of regular surveys on the Territory’s migration markets**

<table>
<thead>
<tr>
<th>Components and scope</th>
<th>Small project - 100+ completed surveys for each component</th>
<th>Large project - 1,000+ surveys for component 1 and 200 surveys for components 2 and 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Survey of existing Territory residents on:</td>
<td>1. Survey of existing Territory residents on:</td>
<td>1. Survey of existing Territory residents on:</td>
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<tr>
<td>a. Basic demographics</td>
<td>a. Extended demographics and family situations</td>
<td>a. Extended demographics and family situations</td>
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<tr>
<td>b. Length of residency in the Territory including locations and internal migration patterns</td>
<td>b. Length of residency in the Territory including locations and internal migration patterns</td>
<td>b. Length of residency in the Territory including locations and internal migration patterns</td>
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<tr>
<td>c. Where they came from and why?</td>
<td>c. Past full migration history</td>
<td>c. Past full migration history</td>
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<tr>
<td>d. Likes and dislikes about the NT</td>
<td>d. Where they came from and why?</td>
<td>d. Where they came from and why?</td>
</tr>
<tr>
<td>e. Repeat residency and reasons</td>
<td>e. Likes and dislikes about the NT</td>
<td>e. Likes and dislikes about the NT</td>
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<tr>
<td>f. Intentions regarding residency in the near and long term</td>
<td>f. Repeat residency and reasons</td>
<td>f. Repeat residency and reasons</td>
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<tr>
<td>g. How intentions to move were shaped</td>
<td>g. How conditions elsewhere contributed to the move to or from the NT</td>
<td>g. How conditions elsewhere contributed to the move to or from the NT</td>
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<tr>
<td>2. Survey of people who used to live in the Territory but have now left:</td>
<td>2. Survey of people who used to live in the Territory but have now left:</td>
<td>2. Survey of people who used to live in the Territory but have now left:</td>
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<tr>
<td>a. Why they moved to the NT, when and who with?</td>
<td>a. Demographics</td>
<td>a. Demographics</td>
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<tr>
<td>Small project - 100+ completed surveys for each component</td>
<td>Large project - 1,000+ surveys for component 1 and 200 surveys for components 2 and 3</td>
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<tr>
<td>b. Repeat residency and reasons</td>
<td>b. Past full migration history</td>
<td></td>
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<tr>
<td>c. Where they came from</td>
<td>c. Repeat residency</td>
<td></td>
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<tr>
<td>d. Why they left and where they went to</td>
<td>d. Where they came from and with who</td>
<td></td>
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<tr>
<td>e. What might attract them back and why?</td>
<td>e. Why they left and where they went to</td>
<td></td>
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<tr>
<td></td>
<td>f. What might attract them back and why</td>
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<tr>
<td>3. Survey of people expressing an interest in moving to the Territory but have not yet done so:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Demographics</td>
<td></td>
<td></td>
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<tr>
<td>b. Past full migration history</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Identification of alumni and targeted questions</td>
<td></td>
<td></td>
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<tr>
<td>d. Factors generating the interest in moving</td>
<td></td>
<td></td>
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<tr>
<td>e. Factors which would secure or are inhibiting a move</td>
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<td></td>
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<tr>
<td>f. Perception of risk and issues in moving to the NT</td>
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<td>g. Where they would move to and why</td>
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<td>h. Who they would move with and why</td>
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<tr>
<td>i. Intentions on length of stay</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Approximate timeframe and staff</th>
<th>1 * Research Fellow (mid-level researcher) for approximately 6 months each time the survey is run</th>
<th>1 * Research Fellow (mid-level researcher) for 8-10 months each time the survey is run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other resources</td>
<td>Access to Australia Post or mobile phone relocation database for component 2</td>
<td>Access to Australia Post or mobile phone relocation database for component 2 and 3</td>
</tr>
</tbody>
</table>
APPENDIX 1 – Terms of Reference for this Report

Purpose of the work
To inform and help shape the Northern Territory Government’s development of an evidence-based Population Plan to grow the numbers of people who call the Territory home.

TERMS OF REFERENCE

<table>
<thead>
<tr>
<th>Component of work</th>
<th>Weighting</th>
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<tbody>
<tr>
<td>1 BRIEF OVERVIEW AND SYNTHESIS OF WHAT WE KNOW</td>
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<tr>
<td>Brief review of existing research and relevant consulting reports to synthesise</td>
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<td>and summarise:</td>
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<td>▶ What keeps people in the NT (differentiating where relevant between</td>
<td>30%</td>
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<td>settlements), and what pressures them to leave.</td>
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<td>Draw on Territory-specific work already done. Northern Institute work</td>
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<td>already completed, and literature from research documenting the international</td>
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<td>experience to highlight key learnings from elsewhere.</td>
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<td>▶ The successes, or otherwise, of population growth strategies employed by each</td>
<td>50%</td>
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<td>Australian jurisdiction.</td>
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<td>Focus on population growth in regional NT-like areas, and internationally in NT-</td>
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<td>comparable locations. Consider the pros and cons of a Population Plan setting</td>
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<td>targets, for example, around a desired population size and/or population growth</td>
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<td>rate.</td>
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<tr>
<td>2 FOCUS ON IDENTIFYING WHAT WE DON’T KNOW</td>
<td>40%</td>
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<tr>
<td>Identify NT-specific research gaps for policy-relevant demographic research, and</td>
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<td>population growth research, with a contemporary twist. For example:</td>
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<td>▶ What are the insights from research on demographic composition of the NT</td>
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<tr>
<td>population and demographic trends that may inform design and development of</td>
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<tr>
<td>policies and programs targeted at growing different segments of the population</td>
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<td>(e.g., women, young families, seniors, migrants, others)?</td>
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<tr>
<td>▶ Where does the NT Government need to focus policy and program</td>
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<td>development, and where does the NT Government need to invest to grow</td>
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<tr>
<td>numbers of people that call the NT home? In other words, towards what sorts of</td>
<td></td>
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<td>policies, programs and investments does the research evidence base lead us?</td>
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<tr>
<td>▶ What are the options for regular surveys on population attraction and</td>
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<td>retention that the NT Government, or the Northern Institute of CDU, could run to</td>
<td></td>
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<tr>
<td>monitor population flows?</td>
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<tr>
<td>▶ The contemporary twist: Are there new ways in which we should be thinking about</td>
<td></td>
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<tr>
<td>attracting and retaining people given we’re in a world made smaller by technology,</td>
<td></td>
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<tr>
<td>and where behaviours and perceptions are changing between generations? And how</td>
<td></td>
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<tr>
<td>should we, and could we, ‘own’ the reality of population transience in the Territory?</td>
<td></td>
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</tbody>
</table>
APPENDIX 2 – A Summary of research studies and resources used or referred to in this report

In this Appendix we list the research grants, projects and papers which have contributed to material in this report or have been directly referred to. More detailed information is available about individual projects on request. Dates of projects (approximate in some cases) are provided in brackets with ongoing projects indicated by no end date:

- The Causes and Consequences of Population Turnover in the Northern Territory: An ARC grant examining many facets of migration to and from the Territory including for nurses, accountants and dentists (2007-2010) and including the TMS survey and qualitative research. Also includes the publication - Stephen Garnett, Kristal Coe, Kate Golebiowska, Helen Walsh and Kerstin Zander, Steven Guthridge, Shu Qin Li and Rosalyn Malysen (2008). Attracting and keeping nursing professionals in an environment of chronic labour shortage: A study of mobility amongst nurses and midwives in the Northern Territory of Australia. Darwin: Charles Darwin University Press.

- Demography at the Edge: Remote human populations in developed nations: This book summarises our international collaborations around understanding population change in northern sparsely populated areas. It includes around 25 case examples from regions in developed nations which are similar to the Territory. It also details the 8Ds of remote Demography’ (2011).


- Evaluation research on the Northern Territory General Skilled Migration Program and Northern Territory Regional Skilled Migration Scheme (2012).

- Settlements at the Edge: Remote Human Settlements in Developed Nations: Settlements at the Edge examines the evolution, characteristics, functions and shifting economic basis of settlements in sparsely populated areas of developed nations. It features around 50 international authors (2016).


- Territory Growth Towns with the Department of Housing, Local Government and Regional Services (20


• Jackson, N. 2005 Tasmania’s turnaround? Migration in the Apple Isle. 


APPENDIX 3 – Population flows to and from the Northern Territory, 1996-97 to 2016-17 by life stages

Children (0-14)

Teens (15-19)
Late Career (55-65)

Seniors (65+)

Arrivals - Males
Departures - Males
Arrivals - Females
Departures - Females