Local Area (SA2 and LGA) Population Projections for South Australia, 2016 to 2036

Government of South Australia
Department of Planning,
Transport and Infrastructure

Local Area Population Projections for South Australia, 2016 to 2036

This document is a summary of the Local Area Population Projections for South Australia, 2016 to 2036.

For further information

Please visit www.saplanningportal.sa.gov.au or contact Planning and Development, the Department of Planning, Transport and Infrastructure on 1800 752 664.

Government of South Australia
Department of Planning, Transport and Infrastructure

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Summary

This report presents local area population projection results for South Australia at the Statistical Area Level 2[1] (SA2) and Local Government Area (LGA) level, for the 20 year period from 2016[2] to 2036. These projections follow on from, and are concordant with, the State and regional population projections for 2016 to 2041 released in June 2019[3].

In South Australia there are 172 SA2s and these projections have been constrained to the 11 population projection regions[4].

Population projections for the 68 LGAs were derived from the SA2 results.

Key Assumptions

- Local area projections (SA2 and LGA) are based on the medium series population projection for each region.
- For SA2s in the Adelaide Greater Capital City Statistical Area ("Greater Adelaide Capital City"), the distribution of population is driven by assumptions about the spatial distribution of future land supply and development opportunities. To achieve this a detailed analysis of; minor infill, major infill and greenfield land supply and potential for development was prepared by the Department of Planning, Transport and Infrastructure (DPTI).
- For SA2s outside of Greater Adelaide the projections are largely based on demographic trends with some intervention to reflect local economic drivers likely to influence population growth.
- The time horizon for the SA2 level projections is from 2016 to 2036. This is 5 years less than the State and regional projections due to the greater uncertainty associated with population projections for small geographic areas.

Projection Results

South Australia and Regions

Table 1 summarises the projected population change (medium series) from 2016-2036 at the regional (and sub-regional) level. South Australia's total population is projected to increase by 273,781 from 1.71 million to 1.99 million by 2036 (medium series). The average annual population increase is 13,682 (0.8%).

Greater Adelaide contains 77.3% of the current (2016) population. By 2036, this share is projected to grow to 78.6%. Greater Adelaide's population is projected to increase by 237,059 to 1.56 million by 2036, an average annual population increase of 11,853 (0.9%).

Table 1 Projected Population Change by Region 2016-2036 (medium series)

Region / sub-region	Population 2016	Projected population 2026	Projected population 2036	Projected population change 2016 to 2036
Adelaide - North	**429,924**	**483,114**	**532,802**	**102,878**
Inner North	303,485	329,188	349,495	46,010
Outer North	126,439	153,927	183,308	56,869
Adelaide - South	**362,685**	**387,673**	**408,573**	**45,888**
Inner South	191,999	205,104	216,057	24,058

[1]The Australian Bureau of Statistics' Statistical Area Level 2 (SA2) is part of the hierarchy of sub-state regions in the main structure of the Australian Statistical Geography Standard (ASGS).
[2] References to years in the text relate to 30 June of those years.
[3] For further information about the method and demographic assumptions used to develop the projections please refer to the DPTI report, Population Projections for South Australia and Regions, 2016-2041, saplanningportal.sa.gov.au
[4] Based on the 11 regions used for state level reporting, with an additional two regions in Greater Adelaide.

Outer South	170,686	182,569	192,516	21,830
Adelaide West	**233,831**	**253,018**	**276,513**	**42,682**
Adelaide Hills	**73,164**	**79,390**	**85,932**	**12,768**
Inner Metro	**224,453**	**240,582**	**257,296**	**32,843**
Greater Adelaide Total	**1,324,057**	**1,443,777**	**1,561,116**	**237,059**
Barossa - Yorke - Mid North	**113,147**	**119,934**	**125,709**	**12,562**
Eyre Peninsula & South West	**58,415**	**57,915**	**58,300**	**-115**
Fleurieu - Kangaroo Island	**51,685**	**58,984**	**65,815**	**14,130**
Limestone Coast	**66,689**	**69,085**	**70,887**	**4,198**
Murray and Mallee	**71,511**	**75,190**	**77,587**	**6,076**
SA - Outback North & East	**27,339**	**26,971**	**27,062**	**-277**
Rest of SA Total	**388,786**	**408,079**	**425,361**	**36,575**
SA Total	**1,712,843**	**1,851,857**	**1,986,477**	**273,634**

Local Area Projections (SA2)

For each SA2, within the regions listed above, a population projection was produced based on its underlying demography and the potential for development. Table 2 presents the projected population change (medium series) from 2016-2036 for the top 10 SA2s. The SA2 with the highest projected growth is Munno Para West – Angle Vale with an increase of 17,493 by 2036. The Adelaide SA2 has the third highest growth with nearly 13,000 additional residents by 2036.

By 2036, it is projected that 96,737 additional people will be living in the top 10 SA2s. This is just over 40% of the total projected growth for Greater Adelaide over this time.

Table 2 Top 10 SA2s by highest projected growth, 2016-2036

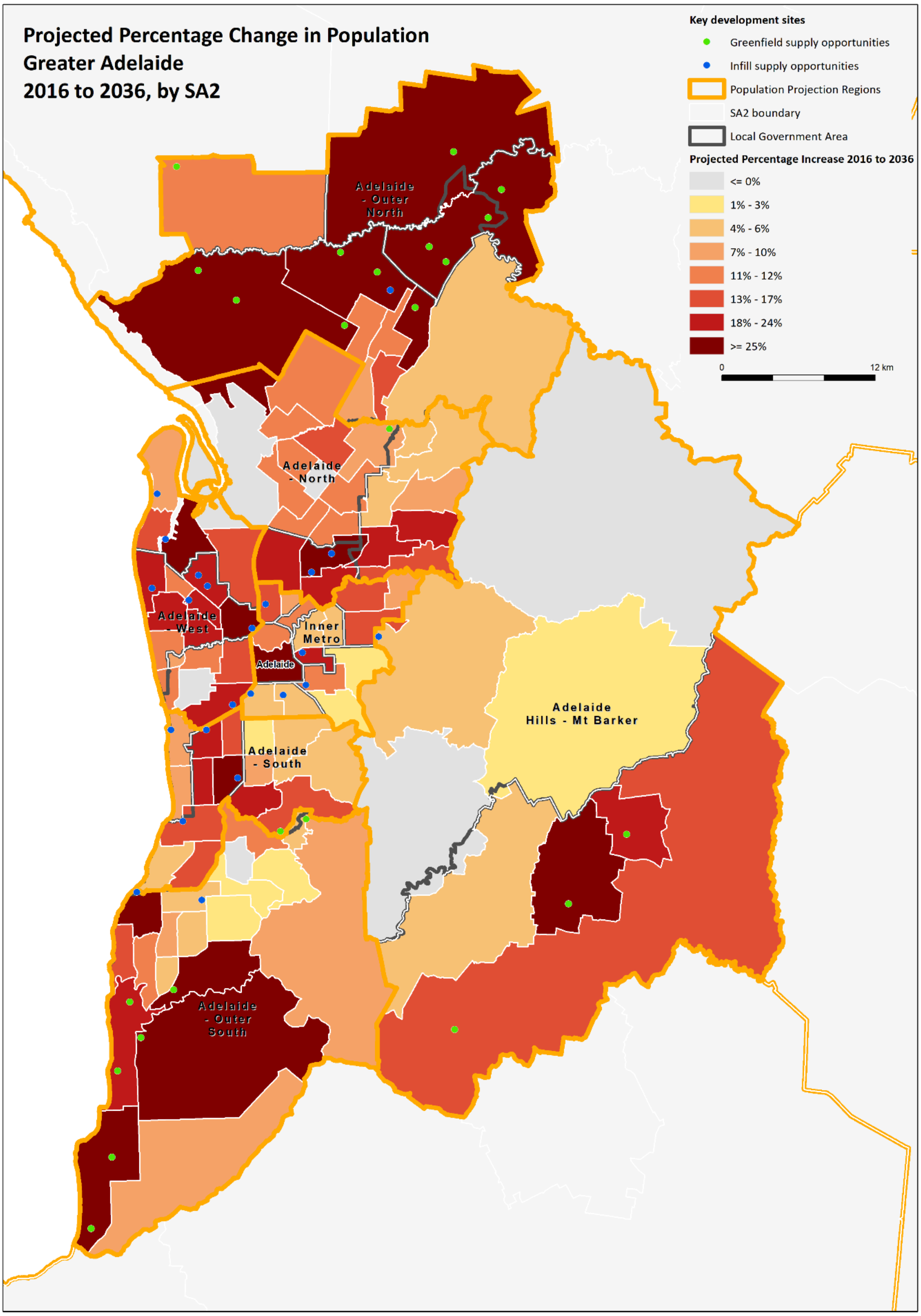
SA2	Region	2016 ERP	2036 Projection	2016 to 2036 Change	Percentage Change 2016 to 2036 (%)
Munno Para West - Angle Vale	Adelaide - Outer North	12,336	29,829	17,493	141.8
Gawler - South	Adelaide - Outer North	20,062	33,978	13,916	69.4
Adelaide	Inner Metro	16,285	29,148	12,863	79.0
Craigmore - Blakeview	Adelaide - Outer North	17,639	28,526	10,887	61.7
Mount Barker	Adelaide Hills	18,365	29,204	10,839	59.0
Northgate - Oakden - Gilles Plains	Adelaide - Inner North	25,130	34,801	9,671	38.5
Hindmarsh - Brompton	Adelaide - West	18,158	23,924	5,766	31.8
Enfield - Blair Athol	Adelaide - Inner North	23,761	29,400	5,639	23.7
Seaford (SA)	Adelaide - Outer South	22,828	27,662	4,834	21.2
Windsor Gardens	Adelaide - Inner North	20,696	25,525	4,829	23.3

Each region's capacity to absorb population growth is varied. Map 1 shows projected growth for the SA2s in the Greater Adelaide Capital City statistical area (GACC). The pattern shows a distribution of growth to the outer north, outer south[5] and east[6] where greenfield opportunities are greatest. There is also significant growth in the Adelaide CBD and the inner and middle ring suburbs, aligning with opportunities for infill development. The region summaries for the whole of South Australia presented in Section 2 outline the total projected population change at the SA2 level, and the land supply

[5] The McLaren Vale SA2 shows high growth but it should be noted this is limited to the Seaford Heights land development.
[6] Mount Barker and Nairne

assumptions used to guide the likely share of projected growth to each SA2.

Map 1 Projected population change, Greater Adelaide, 2016 to 2036



Local Area Projections (LGA)

The projections for Local Government Areas were constructed from the SA2 level projections. Table 3 summarises the top 10 LGAs by projected growth and shows that Playford is projected to grow by nearly 40,000 people by 2036. The LGAs of Port Adelaide Enfield and Charles Sturt combined are projected to increase by almost 52,000.

It is projected that 197,470 additional people will be living in the top 10 LGAs by 2036.

Table 3 Top 10 LGAs by highest projected growth, 2016-2036

LGA	Region	2016 ERP	2036 Projection	2016 to 2036 Change	Percentage Change 2016 to 2036 (%)
Playford	Adelaide - Outer North	90,549	130,080	39,531	43.7
Port Adelaide Enfield	Adelaide - West	123,994	152,501	28,506	23.0
Charles Sturt	Adelaide - West	114,977	138,292	23,316	20.3
Onkaparinga	Adelaide - Outer South	169,368	191,162	21,794	12.9
Marion	Adelaide – Inner South	90,515	107,090	16,575	18.3
Salisbury	Adelaide – Inner North	140,370	156,120	15,750	11.2
Gawler	Adelaide - Outer North	23,352	37,246	13,894	59.5
Adelaide	Inner Metro	23,552	37,117	13,565	57.6
Mount Barker	Adelaide Hills	33,891	46,835	12,944	38.2
Tea Tree Gully	Adelaide - Inner North	99,144	110,739	11,595	11.7

1 Introduction

This report presents the local area population projection results for South Australia at the Statistical Area Level 2 (SA2) and Local Government Area (LGA) level, for the 20 year period from 2016[7] to 2036. These projections follow on from, and are concordant with, the Population Projections for South Australia and Regions, 2016 to 2041 released in June 2019[8].

1.1 Method

Since 1978 the Department of Planning, Transport and Infrastructure (DPTI) and its predecessor agencies have produced population projections for South Australia at the all-of-State, regional and local area levels.

Population projections are developed through a staged process and the projection system used consists of four closely connected models which produce outputs at different geographical scales. These are:

(1) State and Rest of Australia
(2) Regions of the State (11)
(3) SA2 (local areas) (172)
(4) LGAs (derived from SA2 projections) (68)

All models are cohort-component models which project the population by single years of age and proceed forwards in time in single year time intervals. The ‘cohort-component’ element of the model means that population is stratified by birth cohort, and the projected size of each cohort is influenced to the various demographic components of change (i.e. births, deaths and various forms of migration).

With the exception of LGAs, all sub-state geographical areas nest perfectly within larger geographical areas (i.e. SA2s nest within regions; regions nest within the State). The system is a top-down system, which means that projections are constrained to the higher geography by age, sex and every demographic component. For example, interstate out-migration from all large regions of the State when summed over regions equals State-wide interstate out-migration for every age-sex group. However, it is important to note that regional and SA2 projections are still strongly influenced by projection assumptions formulated at the State scale.

Local area projections are inherently more complex because they involve the distribution of the regional population (11 regions across South Australia) to much smaller geographic units (172 SA2s which are then aggregated to the 68 LGAs). This distribution is largely guided by the location of future land supply and development opportunities across Greater Adelaide.

At the State and regional level, a high, medium and low series of population projections were produced. Each series is based on different demographic assumptions for the major components of population change and represent the likely range of future population growth. The medium series is considered to be the most likely outcome at the time of publication and is therefore the only projection series used for the local area projections. The distribution of population to the local areas is guided by land supply assumptions based on existing development patterns, current zoning and potential future growth options.

[7] References to years in the text relate to 30 June of those years.
[8] For further information about the method and demographic assumptions used to develop the projections please refer to the DPTI report, Population Projections for South Australia and Regions, 2016-2041, saplanningportal.sa.gov.au

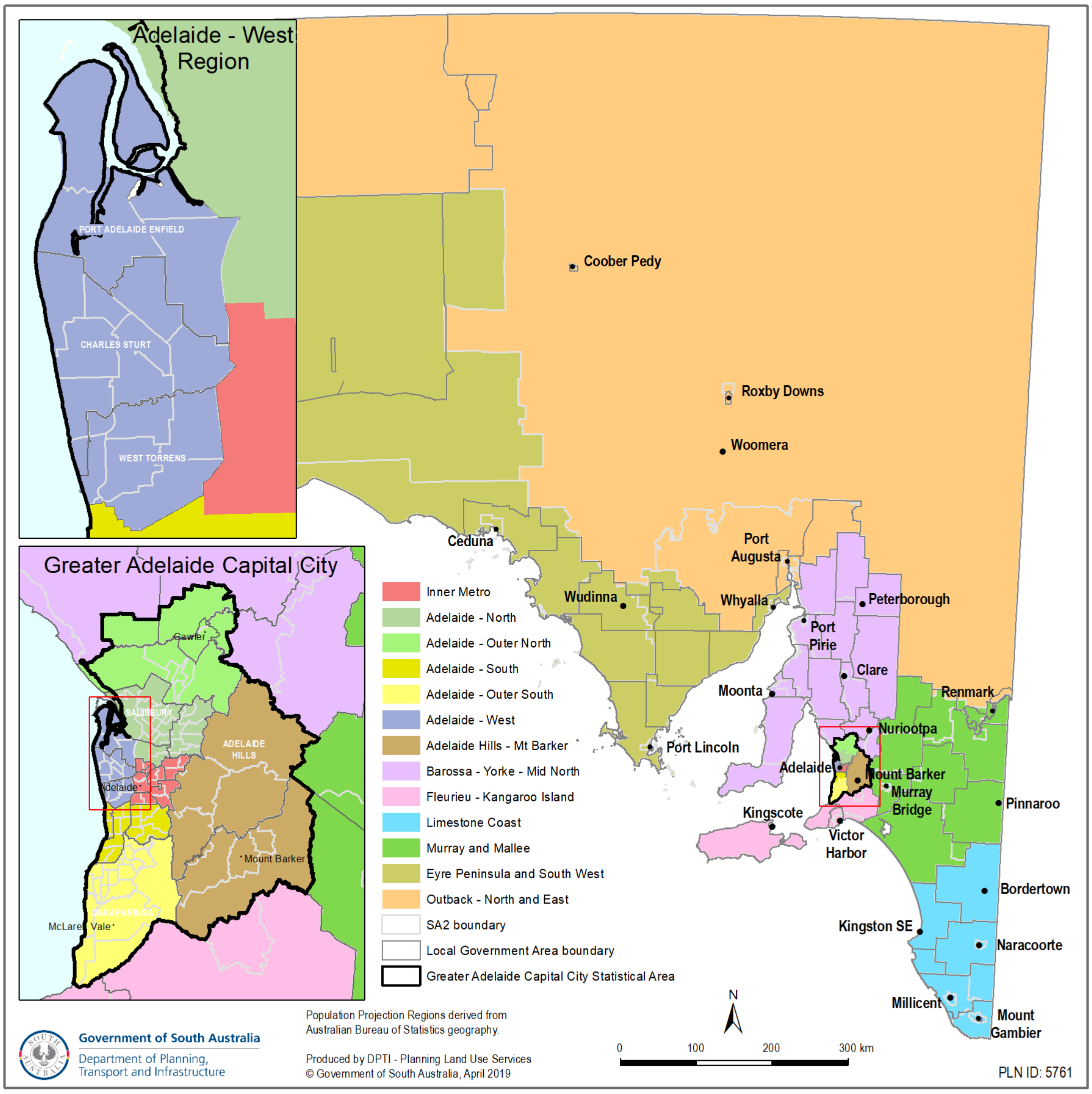
1.2 Local Area Geography

Regions

For the purpose of producing and presenting the local area projections, the large (by both area and population) Adelaide – North and Adelaide – South regions[9] were further divided into an “inner” and “outer” sub-region (see Map 2). Each sub-region better reflects distinct land supply trends and opportunities, with greater greenfield opportunities in the “outer” and infill opportunities dominant in the “inner”. Map 2 shows the resulting 13 regions and the alignment of LGA and SA2 geographies with the State and region boundaries.

The Adelaide – West region has been enlarged in Map 2 to show an example of SA2 and LGA boundary alignments within the region. Unfortunately the SA2s and LGAs are not always concordant thus making it difficult to compare the two. Further, the LGA boundaries are not concordant with the region boundaries. These variations are further represented on the maps throughout Section 2 of this report.

Map 2   Population Projection Regions



[9] Refer to report Population Projections for South Australia and Regions, 2016 – 41

1.3 Strategic Objectives

These projections are also guided by the strategic objectives of the 30-Year Plan for Greater Adelaide, 2017 Update (The 30-Year Plan), which broadly aims to; contain our urban footprint, make better use of our existing infrastructure and protect our natural resources. The Plan aims to contain 85% of all new housing within established urban areas by 2045. As we work towards this target we are seeing progressive change in the urban form, with infill development increasingly contributing towards housing supply across metropolitan Adelaide, in particular within a 10km radius of the city centre.

1.4 Recent Development Trends

Over the six year period from 2012 to 2018, on average, there has been a net increase of nearly 6500 dwellings per annum across Greater Adelaide. Minor infill[10] is now the most significant component of the overall land supply equation accounting for approximately 40% (Figure 1) of the annual metropolitan housing supply growth. A further 31% of our supply comes from major infill which includes apartments, strategic infill sites, and aged care developments. The remaining 29% of our new dwelling stock comes from new land divisions on greenfield land located in metropolitan fringe areas.

These trends were an important consideration in the future distribution of residential development used in these projections.

Figure 1 Residential Development Trends for Greater Adelaide, 2012 to 2018

1.5 Future Land Supply Assumptions

Assumptions about residential land supply and future development opportunities are a key input used to produce local area population projections. These assumptions were compiled at a point in time (October 2019) and are based on current policy and known potential policy amendments, identified as being highly likely to proceed.

[10] DPTI 2012-2018 Minor Infill Fact Sheet, Greater Adelaide, available from the SA Planning Portal

Sections 1.5.1 to 1.5.3 outline the key major infill, greenfield land development opportunities as well as the minor infill supply assumptions.

1.5.1 Major infill land supply opportunities

Major infill opportunities are often generated through a change in land use within the built up urban area, such as a rezoning of industrial or commercial land to residential. The 30-Year Plan has also introduced Urban Corridor Zones (UC) aimed at concentrating growth along major transport corridors. The Adelaide CBD contains further opportunities for large scale apartment development. The following table summarises the known major infill supply opportunities used as inputs into the SA2 population projections.

The location of these developments can be seen on the maps in Section 2.

Table 4 Land Supply Assumptions - Major Infill

Development	SA2	LGA
AAMI Stadium redevelopment, West Lakes	West Lakes / Seaton - Grange	Charles Sturt
Strathmont Centre, Oakden	Northgate – Oakden - Gilles Plains	Port Adelaide Enfield
Glenside Hospital redevelopment	Toorak Gardens	Burnside
Dock One, Fletchers Slip, Port Adelaide	Port Adelaide / Largs Bay – Semaphore	Port Adelaide Enfield
Cement Hill, Marino	Marino – Seaview Downs	Marion
Mitsubishi redevelopment, Tonsley Village	Mitchell Park	Marion
Clipsal redevelopment, Bowden	Hindmarsh – Brompton	Charles Sturt
Morphettville Racecourse DPA	Morphettville / Plympton	Marion / West Torrens
Flagstaff Hill Golf Course	Flagstaff Hill	Onkaparinga
Old Reynella Winery DPA	Reynella	Onkaparinga
Norwood and Kent Town growth precincts	Norwood (SA)	Norwood Payneham & St Peters
Adelaide CBD	Adelaide / North Adelaide	Adelaide
Urban Corridors	Prospect / Richmond / Plympton / Goodwood – Millswood / Unley – Parkside / Toorak Gardens / Norwood / Nailsworth – Broadview / Glenelg (SA)	

1.5.2 Greenfield land supply opportunities

Greenfield land supply provides opportunities for growth on the fringe of metropolitan Adelaide and around the townships. The main opportunities extend to the north and south of Greater Adelaide and east to Mount Barker in the Adelaide Hills. Supply in the south is constrained by the McLaren Vale Character Preservation District[11], whilst opportunities to the north are significantly greater. In fact, during the 20 year period to 2036 it is expected that the current supply of greenfield land in the south will be mostly exhausted, while supply in the Adelaide – North and Adelaide Hills will continue to provide growth options.

[11] Planning, Development and Infrastructure Act 2016

Northern Adelaide

Table 5 Land Supply Assumptions - Greenfield - Northern Adelaide

Development	SA2	LGA
Two Wells	Lewiston – Two Wells	Adelaide Plains
Angle Vale	Munno Para West – Angle Vale	Playford
Roseworthy	Gawler – North	Light
Gawler East	Gawler - South	Gawler
Evanston South	Gawler - South	Gawler
Evanston Gardens	Gawler - South	Gawler
Munno Para West	Munno Para West – Angle Vale	Playford
Blakeview	Craigmore - Blakeview	Playford
Eyre	Virginia – Waterloo Corner	Playford
Playford Alive	Munno Para West – Angle Vale / Davoren Park	Playford
Playford North Extension	Virginia – Waterloo Corner / Munno Para West – Angle Vale	Playford
Virginia	Virginia – Waterloo Corner	Playford
Buckland Park	Virginia – Waterloo Corner	Playford
Concordia	Gawler - South	Barossa

Southern Adelaide / Adelaide Hills

Table 6 Land Supply Assumptions - Greenfield - Southern Adelaide and Hills

Development	SA2	LGA
Blackwood Park	Blackwood	Mitcham
Hackham	Hackham – Onkaparinga Hills / Hackham West – Huntfield Heights	Onkaparinga
Seaford Meadows	Seaford	Onkaparinga
Seaford Heights	McLaren Vale	Onkaparinga
Moana	Seaford	Onkaparinga
Aldinga	Aldinga	Onkaparinga
Sellicks Beach	Aldinga	Onkaparinga
Mount Barker / Nairne	Mount Barker / Nairne	Mount Barker

Regional Townships

Table 7 Land Supply Assumptions - Greenfield - Southern Townships

Development	SA2	LGA
Normanville/Yankalilla	Yankalilla	Yankalilla
Victor Harbor	Victor Harbor	Victor Harbor
Port Elliot/Middleton	Goolwa – Port Elliott	Alexandrina
Goolwa/Hindmarsh Island	Goolwa – Port Elliott	Alexandrina
Strathalbyn	Strathalbyn	Alexandrina
Meadows	Mount Barker Region	Mount Barker
Kangarilla	Clarendon	Onkaparinga

1.5.3 Minor infill land supply opportunities

Minor infill is expected to produce a steady supply of dwellings into the future. This potential is highest in areas where dwelling stock is ageing (>50 years) and the capital value to site value ratio is relatively low (<1.5).

The potential for minor infill developments is most notable in locations within 10km of the city centre, but is gradually extending further towards the south and northeast. From 2026, supply is expected to increase in many SA2s as the capital to site value ratios decrease with an ageing dwelling stock. Table 8 shows the average annual dwelling increase from minor infill over the period 2012-2018 for selected SA2s across Greater Adelaide. These figures, together with estimated development potential[12] were used to calculate the likely future dwelling supply for SA2s.

Table 8 Land Supply Assumptions - Minor Infill

SA2	Corresponding LGAs	Average annual net dwelling Increase 2012 to 2018
Christies Beach	Onkaparinga	74
Christie Downs	Onkaparinga	12
Morphett Vale – East	Onkaparinga	16
Morphett Vale - West	Onkaparinga	25
Warradale	Marion	114
Woodville – Cheltenham	Charles Sturt	42
Mitchell Park	Marion	65
Morphettville	Marion	86
Edwardstown	Marion	53
Plympton	West Torrens	85
Brighton (SA)	Holdfast Bay	30
Richmond (SA)	West Torrens	36
Lockleys	West Torrens	24
Flinders Park	Charles Sturt	46
Henley Beach	Charles Sturt	44
Seaton - Grange	Charles Sturt	60
Beverley	Charles Sturt	38
Enfield – Blair Athol	Port Adelaide Enfield	78
Northgate – Oakden – Gilles Plains	Port Adelaide Enfield, Salisbury, Tea Tree Gully	61
Windsor Gardens	Port Adelaide Enfield	83
Ingle Farm	Salisbury	22
Hope Valley – Modbury	Tea Tree Gully, Port Adelaide Enfield	54
St Agnes – Ridgehaven	Tea Tree Gully	45
Redwood Park	Tea Tree Gully	17
Highbury – Dernancourt	Tea Tree Gully, Port Adelaide Enfield	21
Athelstone	Campbelltown	19
Paradise – Newton	Campbelltown	92
Rostrevor – Magill	Campbelltown, Adelaide Hills	93
Payneham – Felixstow	Norwood Payneham & St Peters	25

[12] Residential Development Potential Analysis Study

1.6 Land Supply Limitations

It is important to note that the land supply inputs prepared by DPTI for the purpose of the population projections could be impacted, either positively or negatively, by changes to any or all of the following factors: planning policy; market demand; land ownership; zoning; infrastructure; competing development opportunities.

Some of the limitations associated with each of the land supply categories are outlined below.

1.6.1 Greenfield land

The supply of greenfield land across Greater Adelaide is unevenly distributed with the majority located in the Outer North. Future supply options in the Outer South are restricted by the McLaren Vale Character Preservation District.

Supporting critical infrastructure (i.e. sewer, roads, water, electrical supply) can often be a limiting factor on the ability to develop greenfield land and this applies to numerous sites across Greater Adelaide. Other limiting factors include; competing growth fronts, market demand, land suitability and zoning.

The two largest longer term supply options in the north are at Buckland Park and Concordia. For the purpose of the population projections these areas have been estimated to contribute a small proportion of their full potential later in the projection period.

1.6.2 Major infill constraints

Growth from major infill developments in Greater Adelaide has contributed an increasing supply of apartments between 2012 and 2018, particularly within Adelaide CBD and Urban Corridor Zones. However, it is worth noting that supply from the Urban Corridor Zones is patchy and it is also difficult to predict where and when projects will commence. Student accommodation within the Adelaide CBD has been increasing in recent years. It is anticipated this supply will flatten out as market demand is met. While there are several key projects underway (Glenside, Bowden, West Lakes (AAMI stadium)) identified future supply is constrained, with the exception being the former SA Health site at Strathmont (Oakden).

1.6.3 Minor infill constraints

Minor infill land supply opportunities are limited by policy, age and condition of the dwelling stock, allotment size, market forces and infrastructure. DPTI uses a residential development potential analysis tool to identify opportunities for infill, based on the site value to capital value ratio, and the frontage width and site area. The actual supply generated is much less than the full potential due to dwelling age, fragmented ownership and market forces. It should also be noted that the supply of development opportunities from ‘minor infill’ (subdivision and redevelopment of existing residential allotments) is significant however the net return from this type of development is relatively low.

2 SA2 level projection Results by Region, 2016 to 2036

2.1 Inner Metro Region (part Adelaide - Central and Hills SA4)

Including LGAs of Adelaide, Prospect, Walkerville, Norwood Payneham & St Peters, Campbelltown, Burnside and Unley.
Including SA2s of Adelaide, North Adelaide, Burnside - Wattle Park, Glenside – Beaumont, Toorak Gardens, Athelstone, Paradise – Newton, Rostrevor – Magill, Norwood (SA), Payneham – Felixstow, St Peters – Marden, Nailsworth – Broadview, Prospect, Walkerville, Goodwood – Millswood, Unley – Parkside.

Region Summary

The Inner Metro region consists of the City of Adelaide and immediately surrounding metropolitan councils to the north, east and south.

At the 2016 census, the population of the region was 226,469. It is projected to grow by 32,843 (medium series) to reach around 259,332 by 2036.

Major infill developments and the construction of numerous residential apartments have contributed to the population growth of 6,642 between 2011 and 2016 with much of that growth within the City of Adelaide.

Key development assumptions for this region include:

- Adelaide CBD – significant and growing supply of apartments and student accommodation;
- Urban Corridor Zones (UrC) – increasing supply with higher density developments;
- Major infill opportunities – growth on land re-zoned to residential, including Glenside Hospital and the Caroma factory site in Norwood;
- Minor Infill opportunities – increasing supply of dwellings on minor infill sites, particularly within Campbelltown LGA.

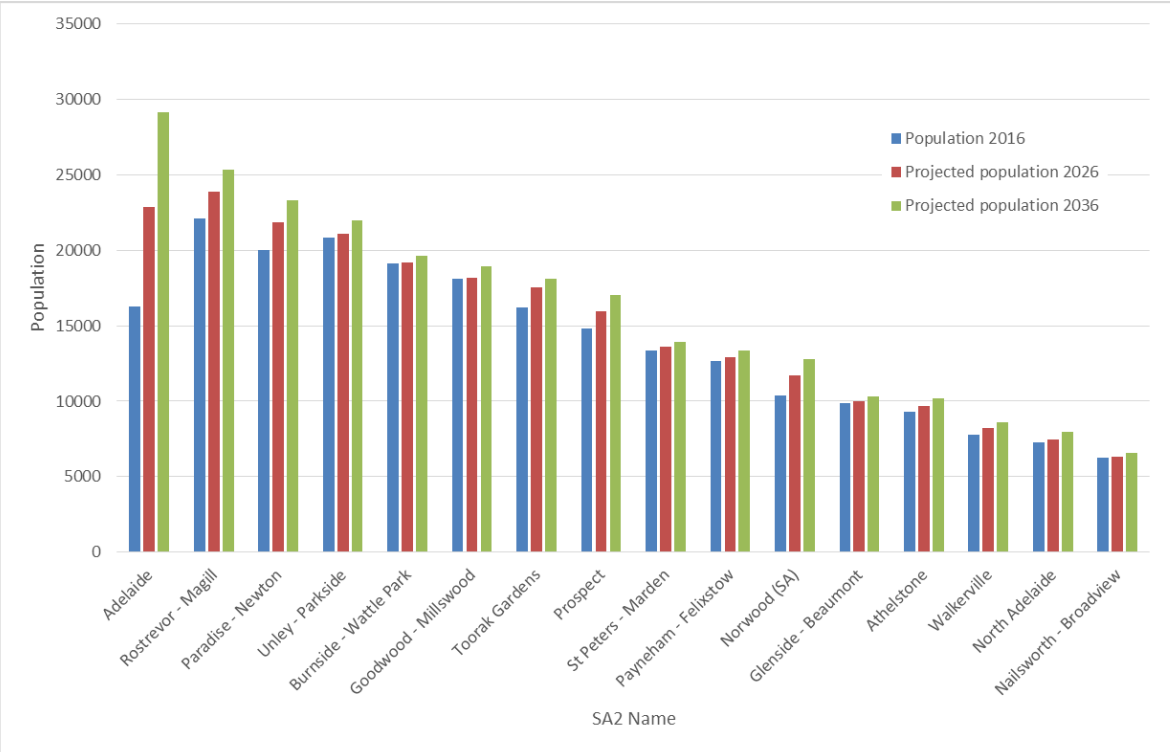
The highest projected population growth is expected within the Adelaide, Rostrevor-Magill and Paradise-Newton SA2s. The Norwood and Prospect SA2s will also see significant growth (see Table 9, Figure 2, Map 3 and for details).

Table 9 Inner Metro Projected Population Assumptions

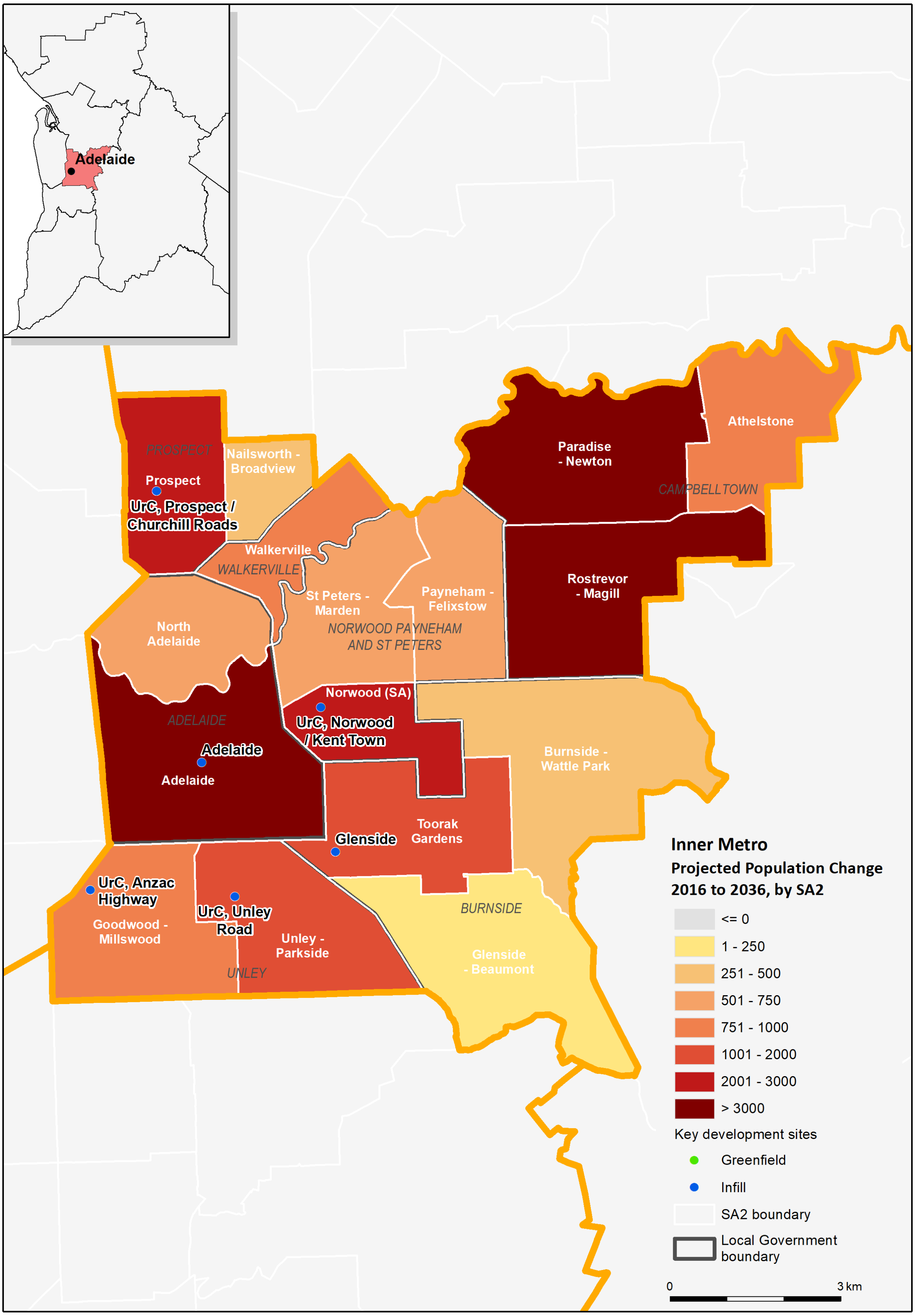
SA2 Name	2016 population	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Adelaide	16,285	29,148	12,863	79.0	• Current supply of apartments to slow from 2021, then remain steady to 2036
North Adelaide	7,267	7,968	701	9.6	• Major infill supply to increase slightly after 2021
Burnside - Wattle Park	19,125	19,659	534	2.8	
Glenside - Beaumont	9,862	10,283	421	4.3	
Toorak Gardens	16,229	18,117	1,888	11.6	• Glenside development completed by 2026
Athelstone	9,326	10,176	850	9.1	
Paradise - Newton	20,034	23,344	3,310	16.5	• Minor infill supply to decrease slightly after 2021, due to minimum lot size increase
Rostrevor - Magill	22,085	25,334	3,249	14.7	• Minor infill supply to decrease slightly after 2021, due to minimum lot size increase
Norwood (SA)	10,397	12,826	2,429	23.4	• Current supply of apartments to slow from 2021, then remain steady to 2036. Caroma site to commence after 2021

Payneham - Felixstow	12,632	13,341	709	5.6	
St Peters - Marden	13,367	13,895	528	4.0	
Nailsworth - Broadview	6,277	6,587	310	4.9	
Prospect	14,847	17,063	2,216	14.9	• Major infill supply in Urban Corridor Zone (UrC) to slow from 2021, then remain steady to 2036
Walkerville	7,781	8,622	841	10.8	• Major infill supply opportunities expected along North East Road
Goodwood - Millswood	18,104	18,965	861	4.8	• Supply to increase through UrC (including LeCornu site)
Unley - Parkside	20,835	21,967	1,132	5.4	• Supply to increase through UrC
TOTAL	**226,469**	**259,332**	**32,843**	**14.5**	

Figure 2 Inner Metro Population 2016, 2026 and 2036 by SA2



Map 3 Inner Metro Projected Population Change 2016 to 2036, by SA2



2.2 Adelaide – Inner North Region (part Adelaide – North SA4)

Including LGAs of Salisbury, Tea Tree Gully, Port Adelaide Enfield (part)
Including SA2s of Enfield - Blair Athol, Northgate - Oakden - Gilles Plains, Windsor Gardens, Dry Creek – North, Ingle Farm, Para Hills, Parafield, Parafield Gardens, Paralowie, Salisbury, Salisbury East, Salisbury North, Mawson Lakes - Globe Derby Park, Pooraka – Cavan, Golden Grove, Greenwith, Highbury – Dernancourt, Hope Valley – Modbury, Modbury Heights, Redwood Park, St Agnes - Ridgehaven

Region Summary

The Adelaide – Inner North region covers a large area north of Adelaide, from Windsor Gardens in the south to Salisbury North in the north. The area has significant opportunities for growth through large scale infill developments, such as the almost completed Lightsview and the future development of land at Strathmont (Oakden), and through small scale infill opportunities.

At the 2016 census, the population of the region was 303,485. It is projected to grow by 46,010 (medium series) to reach around 349,500 by 2036.

Key development assumptions for this region include:

- Lightsview – completed by 2021
- Strathmont – commencing after 2021
- Modbury Urban Core Zone – minor and major infill opportunities including aged care

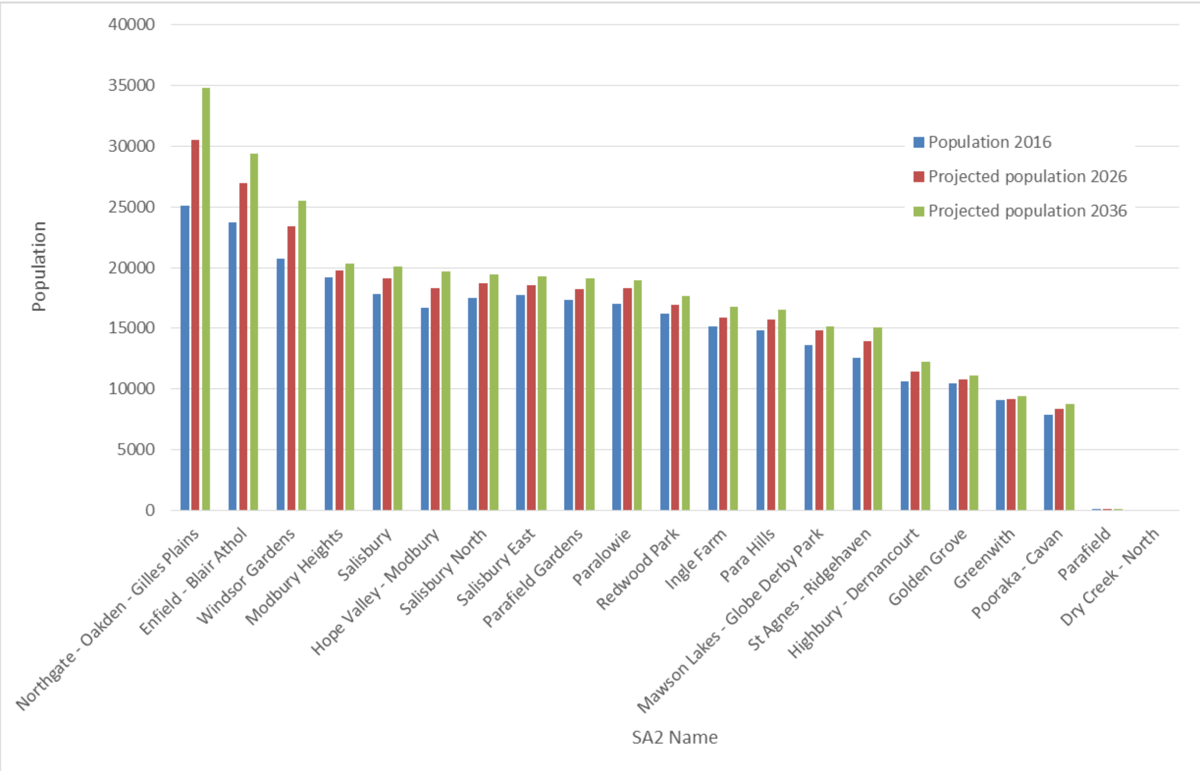
A large proportion of this growth is expected to occur within the Windsor Gardens, Enfield - Blair Athol, and Northgate - Oakden - Gilles Plains SA2s (see Table 10, Figure 3 and Map 4 for details).

Table 10 Adelaide – Inner North Projected Population and Land Supply Assumptions

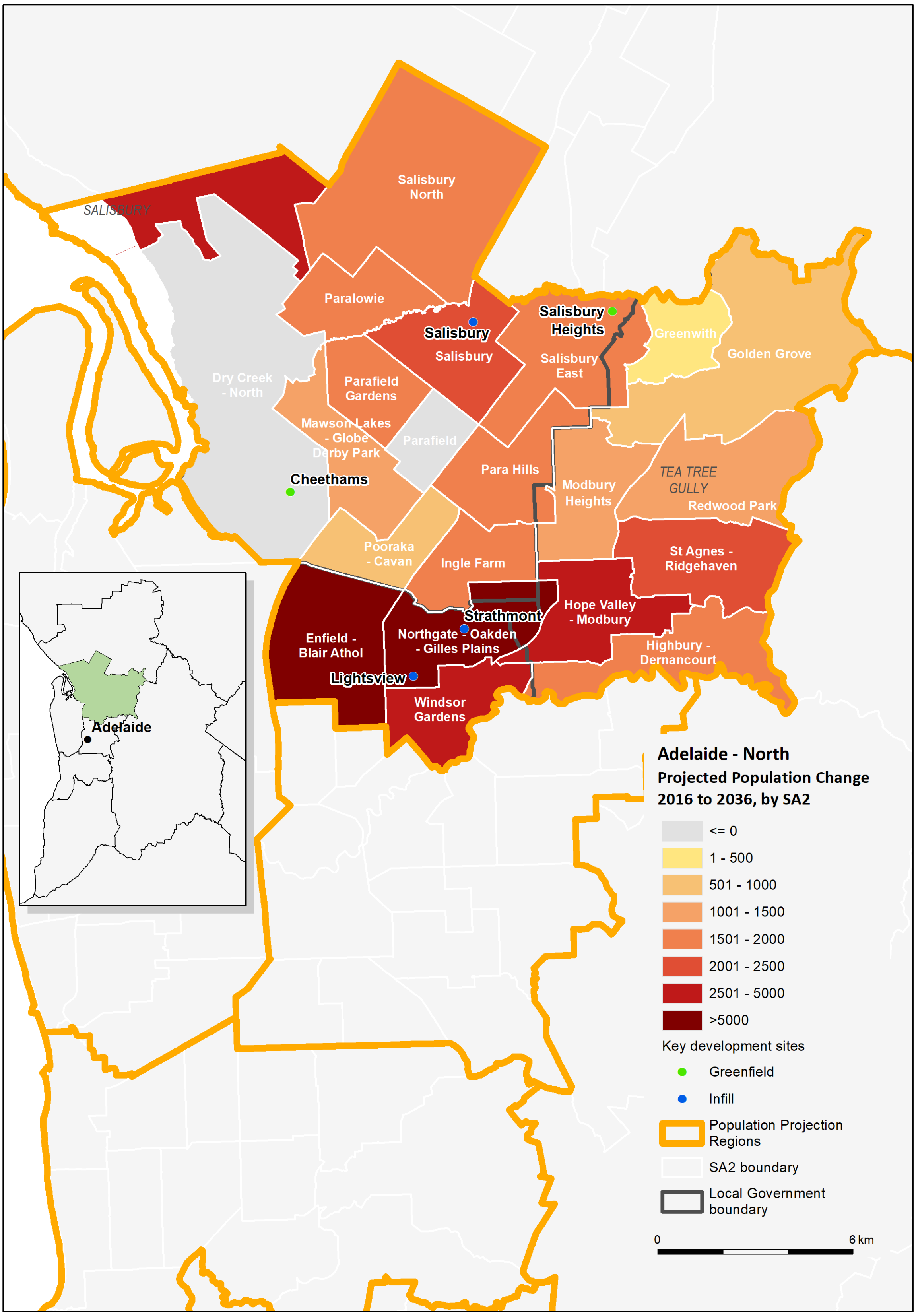
SA2 Name	2016 ERP	2036 projection	2016 - 2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Enfield - Blair Athol	23,761	29,400	5,639	23.7	• Minor infill supply to increase steadily.
Northgate - Oakden - Gilles Plains	25,130	34,801	9,671	38.5	• Minor infill supply to increase steadily. • Major infill supply at Lightsview, completed by 2021. Strathmont development to commence after 2021.
Windsor Gardens	20,696	25,525	4,829	23.3	• Minor infill supply to remain steady.
Dry Creek - North	0	0	0	-	• Deferred urban land at Cheethams was not included for residential development.
Ingle Farm	15,135	16,758	1,623	10.7	• Minor infill supply to increase after 2026.
Para Hills	14,853	16,532	1,679	11.3	• Minor infill supply to increase after 2026.
Parafield	118	104	-14	-11.9	
Parafield Gardens - Parafield	17,303	19,147	1,844	10.7	• Greenfield supply diminishing. • Minor infill supply to remain steady
Paralowie	16,989	18,891	1,902	11.2	• Greenfield supply diminishing. • Minor infill supply to remain steady
Salisbury	17,811	20,134	2,323	13.0	• Minor infill supply to increase after 2026.
Salisbury East	17,731	19,306	1,575	8.9	• Greenfield supply to remain steady. • Minor infill supply to increase after 2026.
Salisbury North	17,512	19,464	1,952	11.1	• Greenfield supply diminishing. • Minor infill supply to increase after 2026.

Mawson Lakes - Globe Derby Park	13,650	15,186	1,536	11.2	• Greenfield supply to diminish by 2026.
Pooraka - Cavan	7,863	8,750	887	11.3	• Minor infill supply to remain steady.
Golden Grove	10,459	11,114	655	6.3	
Greenwith	9,127	9,416	289	3.2	
Highbury - Dernancourt	10,648	12,250	1,602	15.0	• Minor infill supply to increase steadily.
Hope Valley - Modbury	16,710	19,646	2,936	17.6	• Minor infill supply to increase steadily. • Major infill supply to increase in areas surrounding Modbury Urban Core Zone, including retirement living opportunities.
Modbury Heights	19,205	20,341	1,136	5.9	• Minor infill supply to increase after 2026.
Redwood Park	16,212	17,663	1,451	9.0	• Minor infill supply to increase after 2026.
St Agnes - Ridgehaven	12,572	15,066	2,494	19.8	• Minor infill supply to increase steadily.
TOTAL	**303,485**	**349,494**	**46,009**	**15.0**	

Figure 3 Adelaide – Inner North Population 2016, 2026 and 2036 by SA2



Map 4 Adelaide – Inner North Projected Population Change 2016 to 2036, by SA2



2.3 Adelaide - Outer North Region (part Adelaide - North SA4)

Including LGAs of Gawler, Playford, Barossa (part), Light (part), Adelaide Plains (part)
Including SA2s of Gawler – North, Gawler – South, Lewiston - Two Wells, Craigmore – Blakeview, Davoren Park, Elizabeth, Elizabeth East, Munno Para West - Angle Vale, One Tree Hill, Smithfield - Elizabeth North, Virginia - Waterloo Corner

Region Summary

The Adelaide - Outer North region covers a large area north of Adelaide, extending to Roseworthy and Two Wells. The region provides the greatest opportunity of all regions for greenfield development into the future.

At the 2016 census, the population of the region was 126,439. It is projected to grow by 56,869 (medium series) to reach around 183,300 by 2036.

Key development assumptions for this region include:

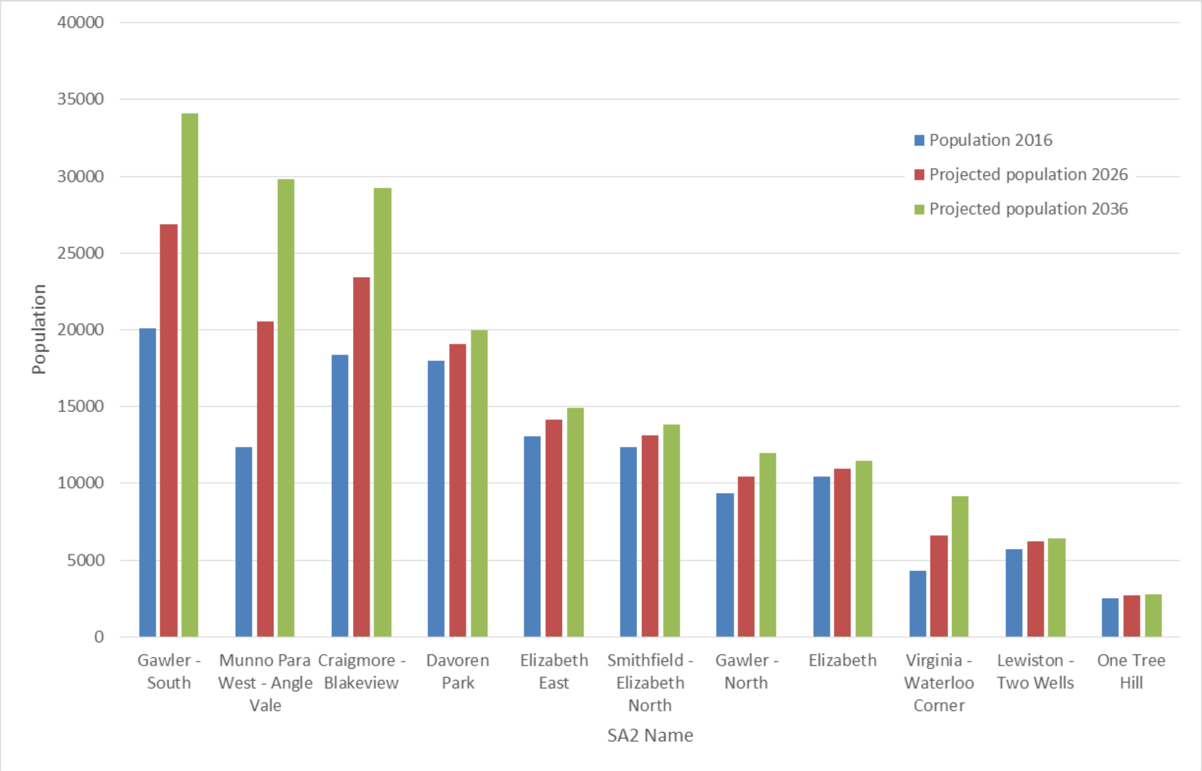
- Gawler East, Evanston South and Evanston Gardens – increased supply;
- Virginia and Eyre – supply remaining steady;
- Elizabeth (Gawler rail corridor) and Davoren Park - increasing minor infill opportunities;
- Blakeview – Renewal SA land to be released after 2021;
- Roseworthy – to commence after 2021;
- Concordia and Buckland Park –to commence gradually after 2026.

This growth is expected to be distributed predominantly within greenfield land divisions in the SA2s of Gawler – South, Munno Para West – Angle Vale, Craigmore – Blakeview, and Virginia – Waterloo Corner (see Table 11, Figure 4 and Map 5 for details).

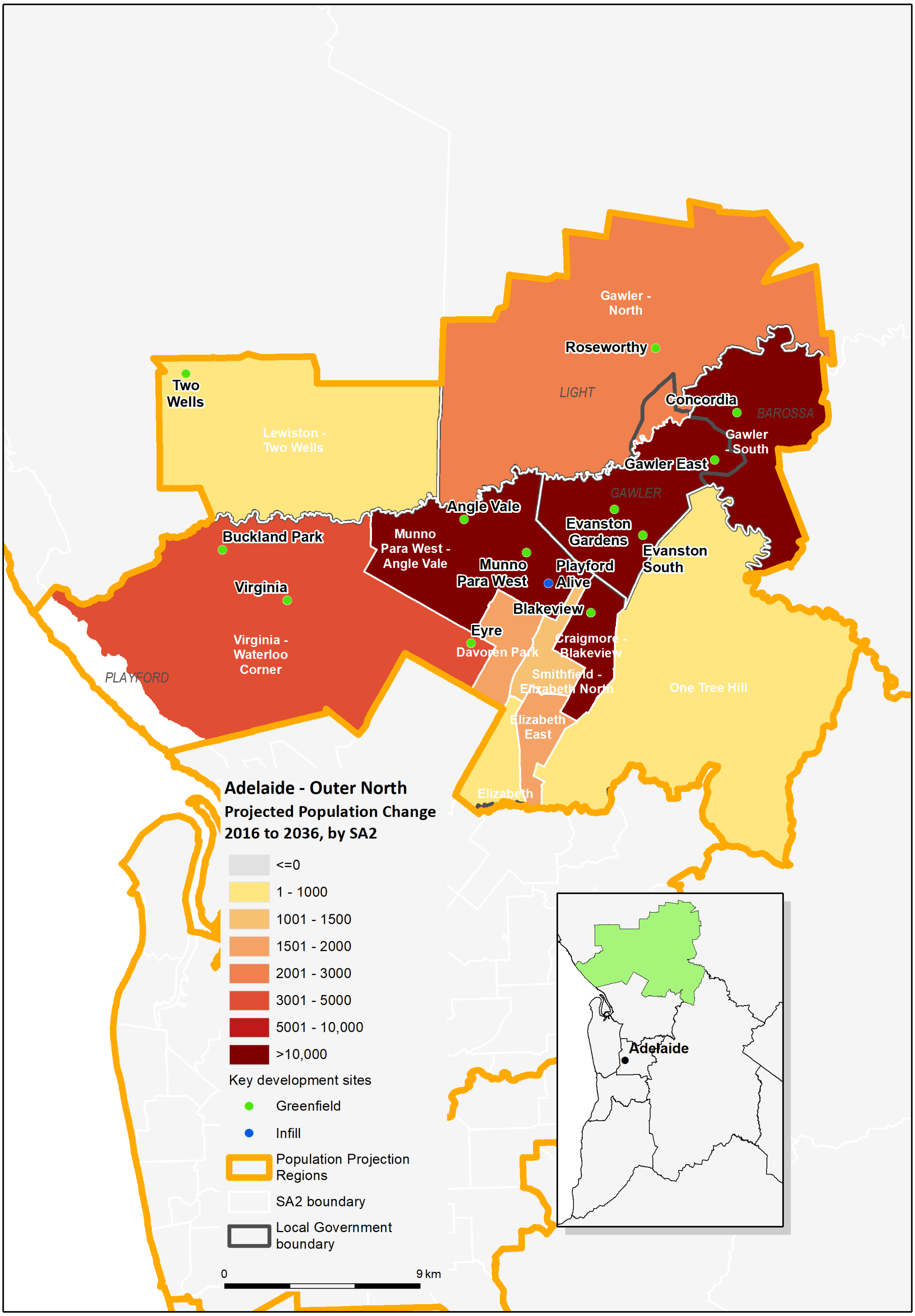
Table 11 Adelaide – Outer North Projected Population and Land Supply Assumptions

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Gawler - North	9,343	11,971	2,628	28.1	• Greenfield supply to increase after 2021. Roseworthy development.
Gawler - South	20,062	33,978	13,916	69.4	• Greenfield supply to increase. Gawler East, Evanston Gardens, Evanston South developments to continue. Possible supply from Concordia after 2026.
Lewiston - Two Wells	5,686	6,378	692	12.2	• Greenfield supply readily available.
Craigmore - Blakeview	18,365	29,204	10,839	59.0	• Greenfield supply to remain steady. Renewal SA land at Blakeview for release after 2021.
Davoren Park	17,966	19,946	1,980	11.0	• Greenfield supply to decrease. Minor infill supply to increase steadily.
Elizabeth	10,463	11,449	986	9.4	• Minor infill supply to increase after 2026, resulting from Gawler railway corridor DPA.
Elizabeth East	13,066	14,913	1,847	14.1	• Minor infill supply to increase steadily after 2026.
Munno Para West - Angle Vale	12,336	29,829	17,493	141.8	• Greenfield supply to increase after 2021. Angle Vale, Munno Para West, Playford Alive.
One Tree Hill	2,537	2,734	197	7.8	
Smithfield - Elizabeth North	12,337	13,799	1,462	11.9	• Greenfield supply to increase after 2031. Possible release of Defence land at Smithfield.
Virginia - Waterloo Corner	4,278	9,107	4,829	112.9	• Greenfield supply to remain steady to 2021, with Virginia and Eyre developments to continue. Buckland Park to commence gradually after 2026.
TOTAL	**126,439**	**183,308**	**56,869**	**45.0**	

Figure 4 Adelaide - Outer North Population 2016, 2026 and 2036 by SA2



Map 5 Adelaide - Outer North Projected Population Change 2016 to 2036, by SA2



2.4 Adelaide – Inner South Region (part Adelaide – South SA4)

Including LGAs of Mitcham, Marion, Holdfast Bay
Including SA2s of Brighton (SA), Glenelg (SA), Edwardstown, Hallett Cove, Marino - Seaview Downs, Mitchell Park, Morphettville, Sheidow Park - Trott Park, Warradale, Belair, Bellevue Heights, Blackwood, Colonel Light Gardens, Mitcham (SA), Panorama

Region Summary

The Adelaide – Inner South region covers an area south of Adelaide, between the sea to the west and the hills to the east. The region has significant retail and commercial centres at Oaklands Park (Marion Shopping Centre) and Glenelg; and health and education at Bedford Park (Flinders University / Flinders Medical Centre).

At the 2016 census, the population of the region was 191,999. It is projected to grow by 24,057 (medium series) to reach around 216,000 by 2036.

Key development assumptions for this region include:

- Blackwood Park – greenfield supply diminishing
- Tonsley redevelopment – increasing supply
- Cement Hill, Marino – to commence after 2021
- Morphettville racecourse – to commence after 2026
- Flinders Village – student accommodation hub to commence after 2021
- Minor infill supply to continue steadily

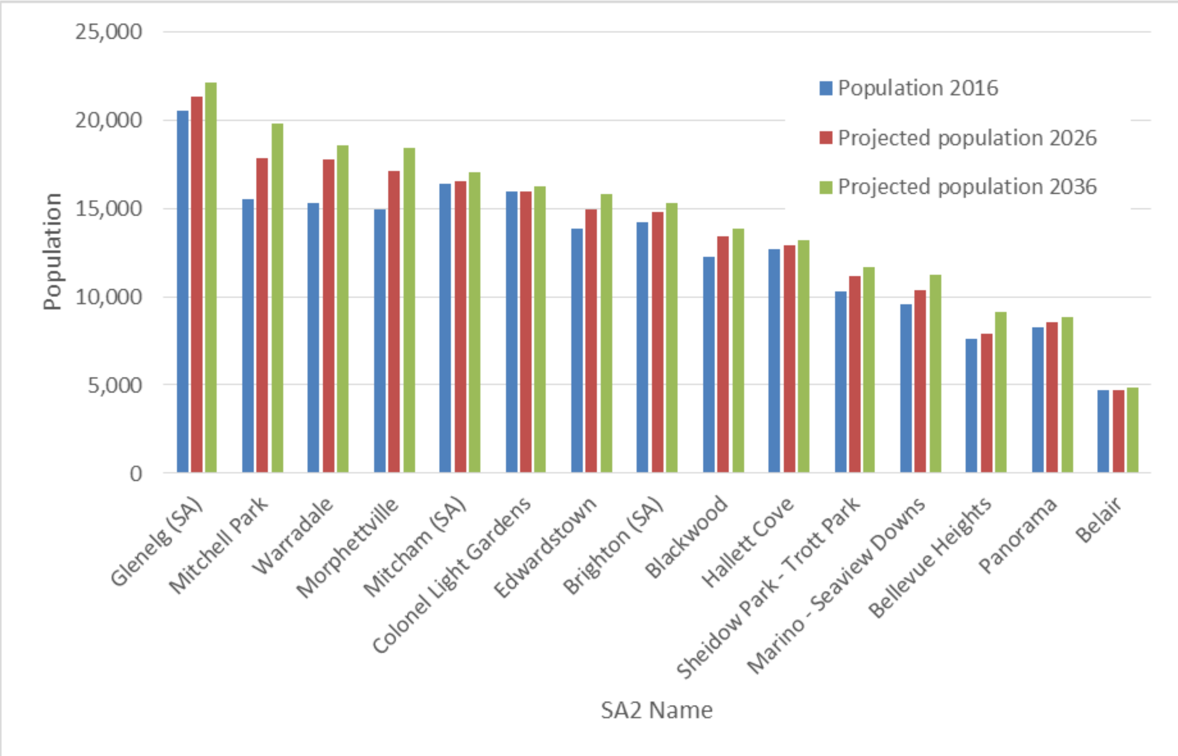
The redevelopment of Tonsley and the proposed redevelopment of Morphettville racecourse will drive much of this growth along with continued minor infill opportunities. Minor Infill opportunities are expected to provide growth within Warradale, Mitchell Park and Morphettville SA2s (see Table 12, Figure 5 and Map 6 for details).

Table 12 Adelaide – Inner South Projected Population and Land Supply Assumptions

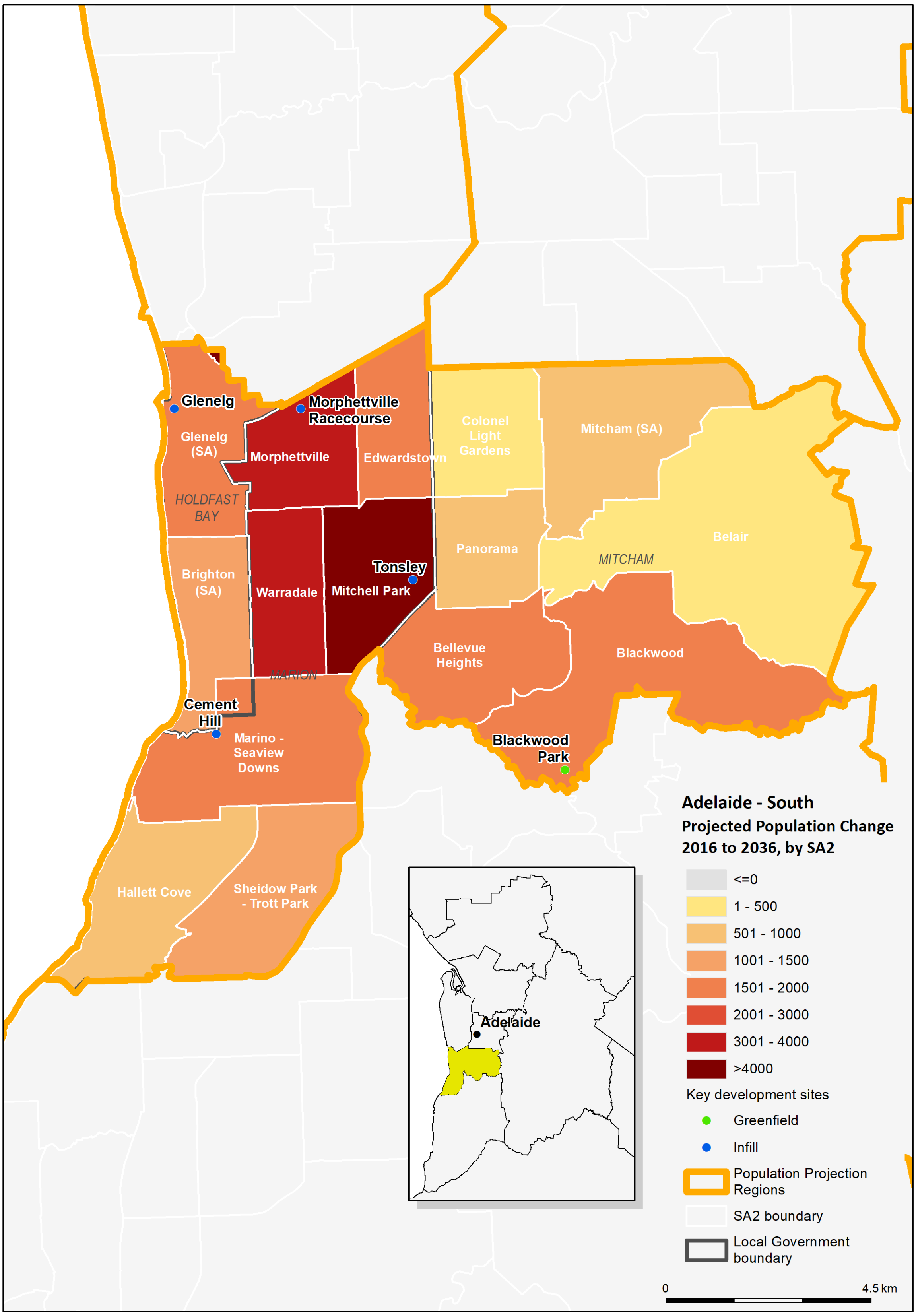
SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Brighton (SA)	14,202	15,260	1,058	7.4	• Minor infill supply to remain steady
Glenelg (SA)	20,632	22,076	1,444	7.0	• Major infill supply opportunities
Edwardstown	13,862	15,826	1,964	14.2	• Minor infill supply to increase steadily
Hallett Cove	12,734	13,216	482	3.8	•
Marino - Seaview Downs	9,535	11,234	1,699	17.8	• Cement Hill development at Marino to commence after 2021
Mitchell Park	15,405	19,828	4,423	28.7	• Minor infill supply to remain steady • Tonsley development site to continue
Morphettville	14,982	18,426	3,444	23.0	• Morphettville racecourse (southern section) to commence after 2026
Sheidow Park - Trott Park	10,306	11,653	1,347	13.1	• Greenfield supply diminishing
Warradale	15,173	18,573	3,400	22.4	• Minor infill supply to remain steady • Infill supply to increase around Marion shopping centre (DPA in progress)
Belair	4,686	4,885	199	4.3	
Bellevue Heights	7,569	9,137	1,568	20.7	• Flinders Village to commence after 2021

Blackwood	12,307	13,865	1,558	12.7	• Blackwood Park to be complete before 2026
Colonel Light Gardens	15,933	16,197	264	1.7	
Mitcham (SA)	16,349	17,037	688	4.2	
Panorama	8,324	8,843	519	6.2	
TOTAL	**191,999**	**216,056**	**24,057**	**12.5**	

Figure 5 Adelaide - Inner South Population 2016, 2026 and 2036 by SA2



Map 6 Adelaide - Inner South Projected Population Change 2016 to 2036, by SA2



2.5 Adelaide – Outer South Region (part Adelaide – South SA4)

Including LGAs of Onkaparinga
Including SA2s of Aberfoyle Park, Aldinga, Christie Downs, Christies Beach, Clarendon, Coromandel Valley, Flagstaff Hill, Hackham - Onkaparinga Hills, Hackham West - Huntfield Heights, Happy Valley, Happy Valley Reservoir, Lonsdale, McLaren Vale, Morphett Vale – East, Morphett Vale – West, Reynella, Seaford (SA), Willunga, Woodcroft

Region Summary

The Adelaide – Outer South region covers a large area south of Adelaide. It is bounded by the sea to the west and the hills to the east. The region has a significant industry centre at Lonsdale, while the south eastern part of the region is rural and dominated by the McLaren Vale wine region.

At the 2016 census, the population of the region was 170,686. It is projected to grow by 21,830 (medium series) to reach around 192,500 by 2036.

Key development assumptions for this region include:

- Aldinga – Renewal SA land to commence after 2021
- Noarlunga Centre – increasing densities after 2026
- Hackham – growth area to release land after 2021
- Seaford Heights – supply until 2026
- Seaford Meadows – supply until 2026

Greenfield opportunities in the SA2s of Seaford, Aldinga and McLaren Vale (Seaford Heights) continue to provide growth in the region, with land in Hackham – Onkaparinga Hills SA2 expected to be released after 2021. Greenfield supply in the region is diminishing, with opportunities restricted by the Urban Growth boundary and McLaren Vale Character Preservation District.

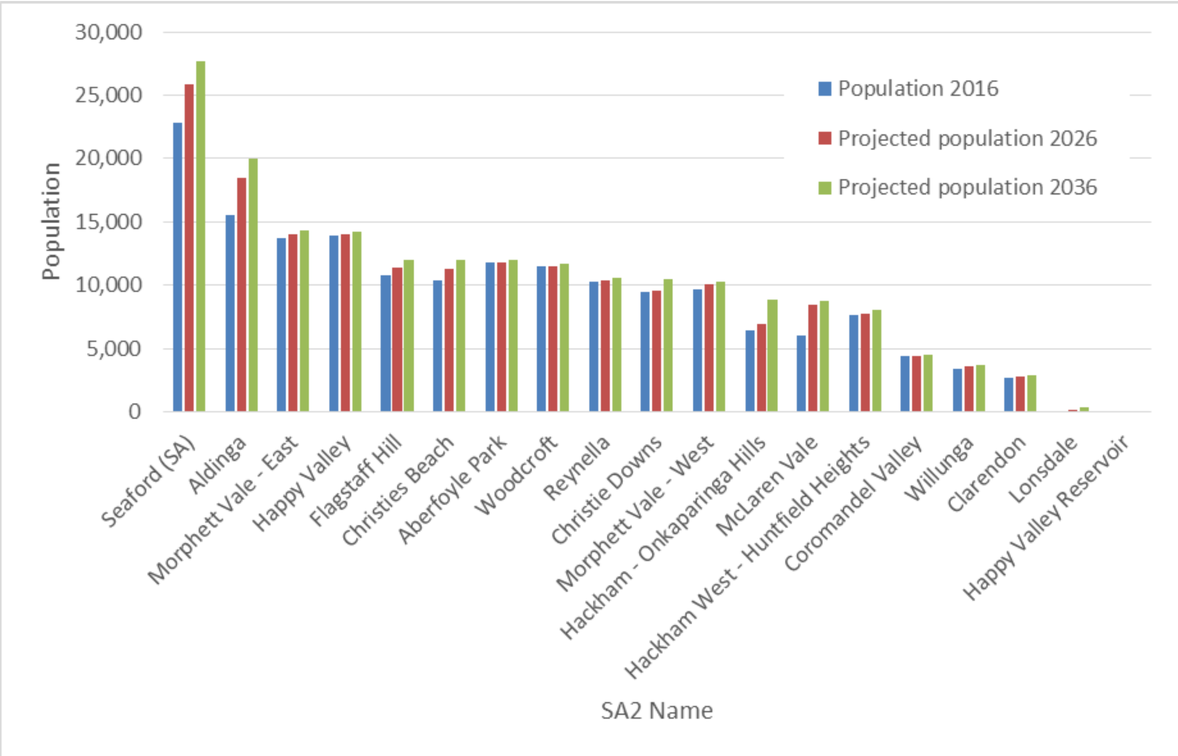
Continued growth through minor infill is expected through Christies Beach, Christie Downs and Morphett Vale – East/West SA2s (see Table 13, Figure 6 and Map 7 or details).

Table 13 Adelaide – Outer South Projected Population and Land Supply Assumptions

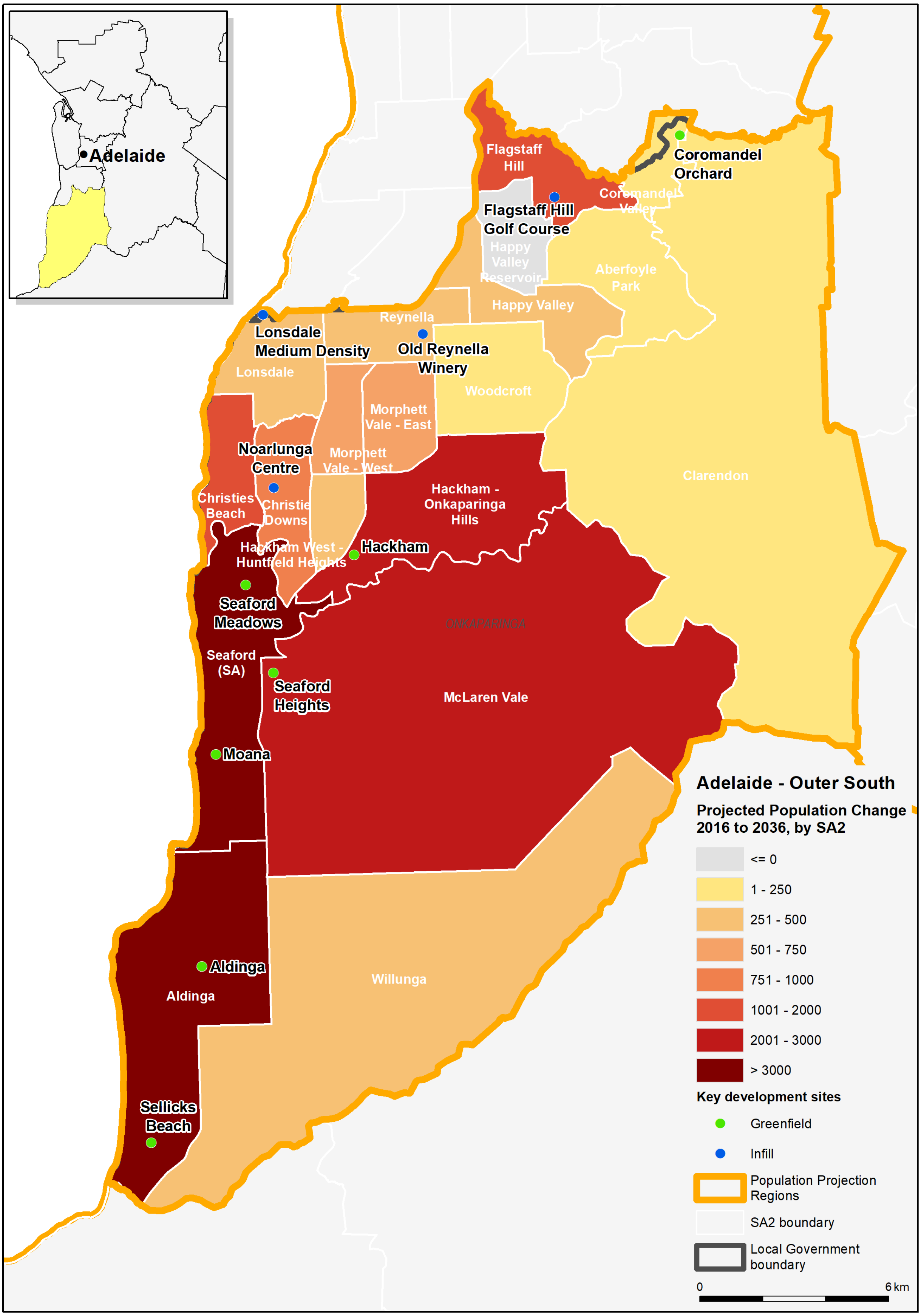
SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Aberfoyle Park	11,863	11,952	89	0.7	
Aldinga	15,627	19,945	4,318	27.6	• Aldinga Renewal SA land to commence after 2021. • Sellicks Beach greenfield supply to continue at a steady rate. • Land supply restrained by urban growth boundary.
Christie Downs	9,499	10,428	929	9.8	• Supply of infill to increase steadily. • Increasing densities surrounding Noarlunga Centre after 2026.
Christies Beach	10,382	12,059	1,677	16.2	• Supply of infill to increase steadily. • Housing SA land development after 2021
Clarendon	2,739	2,887	148	5.4	
Coromandel Valley	4,435	4,546	111	2.5	
Flagstaff Hill	10,771	12,048	1,277	11.9	• Flagstaff Hill Golf Course retirement development to be completed by 2026 • Supply of infill to increase steadily.
Hackham - Onkaparinga Hills	6,352	8,906	2,554	40.2	• Steady supply of greenfield land. • Hackham growth area to release land after 2021
Hackham West - Huntfield Heights	7,651	8,000	349	4.6	• Diminishing greenfield supply

Happy Valley	13,830	14,252	422	3.1	
Happy Valley Reservoir	0	0	0	-	
Lonsdale	30	370	340	1133.3	• Lonsdale DPA
McLaren Vale	6,090	8,832	2,742	45.0	• Seaford Heights supply until 2026. • Limited supply in McLaren Vale.
Morphett Vale - East	13,739	14,320	581	4.2	• Supply of infill to increase steadily.
Morphett Vale - West	9,591	10,263	672	7.0	• Supply of infill to increase steadily.
Reynella	10,231	10,623	392	3.8	• Supply of infill to increase steadily.
Seaford (SA)	22,828	27,662	4,834	21.2	• Supply of infill to increase steadily. • Seaford Meadows to generate high yield and extend until 2026.
Willunga	3,470	3,719	249	7.2	• Limited development opportunities
Woodcroft	11,558	11,704	146	1.3	• Limited development opportunities
TOTAL	**170,686**	**192,516**	**21,830**	**12.8**	

Figure 6 Adelaide – Outer South Population 2016, 2026 and 2036 by SA2



Map 7 Adelaide - Outer South Projected Population Change 2016 to 2036, by SA2



2.6 Adelaide – West Region (SA4)

Including LGAs of West Torrens, Charles Sturt, Port Adelaide Enfield (part)
Including SA2s of Beverley, Flinders Park, Henley Beach, Hindmarsh – Brompton, Royal Park - Hendon - Albert Park, Seaton – Grange, West Lakes, Woodville – Cheltenham, Dry Creek – South, Largs Bay – Semaphore, North Haven, Port Adelaide, The Parks, Torrens Island, Adelaide Airport, Fulham, Lockleys, Plympton, Richmond (SA), West Beach

Region Summary

The Adelaide – West region is located between the city and the sea. The region is the traditional industrial heartland of the Adelaide metropolitan area.

At the 2016 census, the population of the region was 233,831. It is projected to grow by 42,682 (medium series) to reach around 276,500 by 2036.

Key development assumptions for this region include:

- Woodville West – regeneration area to deliver steady supply until 2026
- Bowden – development to continue to 2036, with a variety of townhouse and apartment options
- AAMI Stadium, West Lakes – to be completed by 2026
- Port Adelaide – Dock 1 and Fletchers Slip to be completed by 2026. Other opportunities in the area to continue steadily.
- Thebarton – development opportunities along Port Road, including Coca Cola site

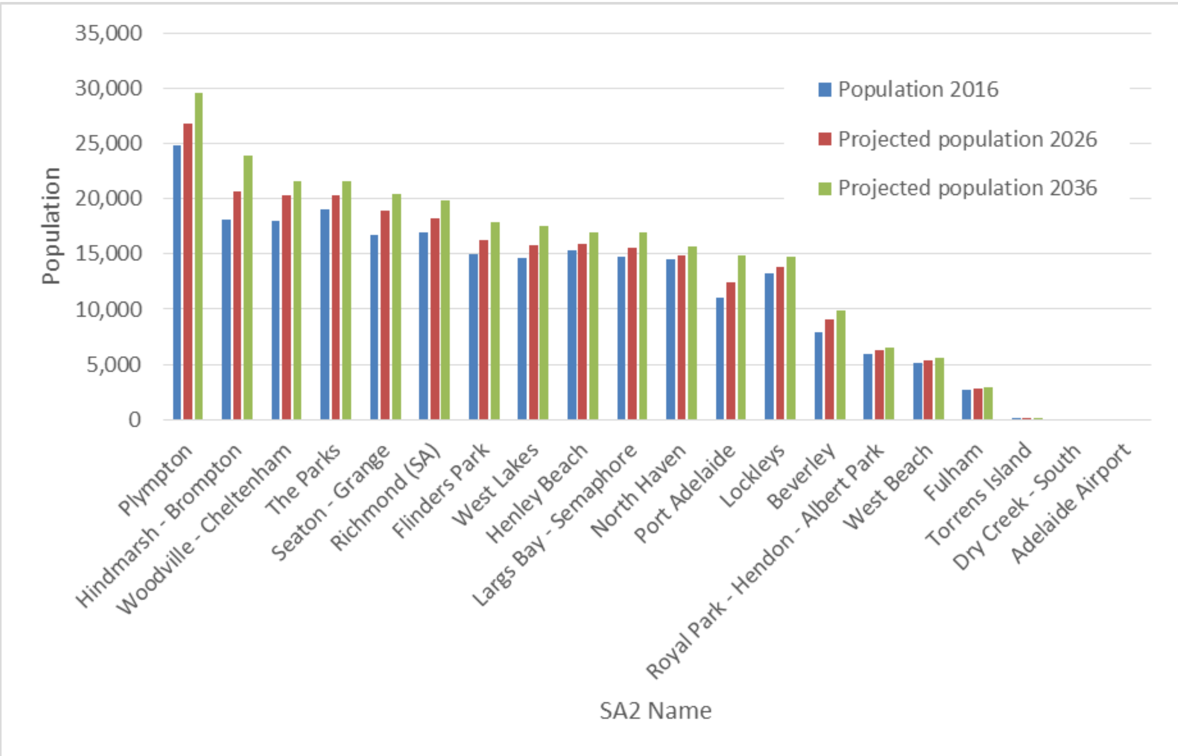
The major infill / urban renewal opportunities in Bowden, Woodville West, Port Adelaide, St Clair and West Lakes will continue to drive growth in the region along with abundant minor infill opportunities (see Table 14, Figure 7 and Map 8 for details).

Table 14 Adelaide - West Projected Population and Land Supply Assumptions

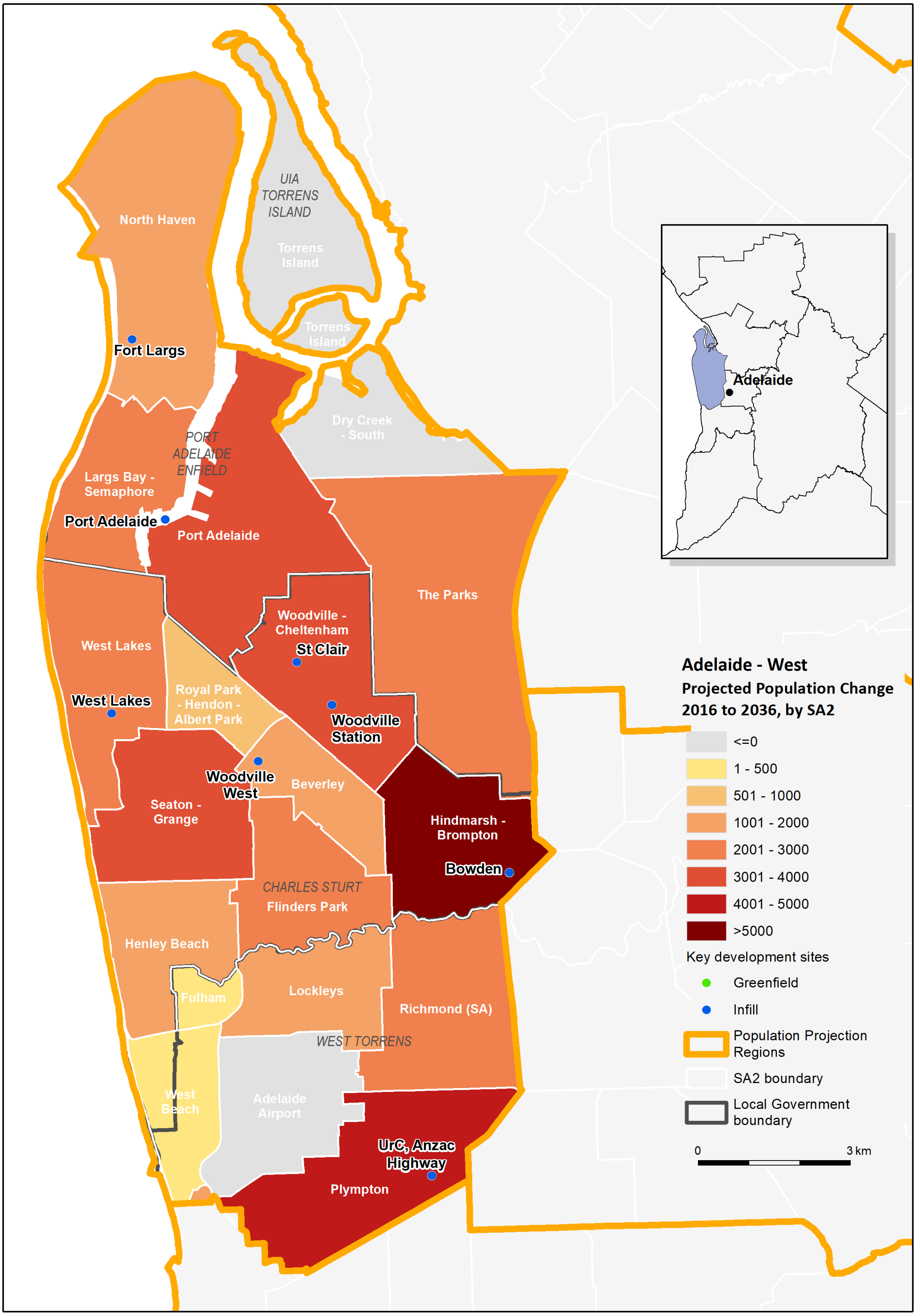
SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Beverley	7,936	9,864	1,928	24.3	• Woodville West regeneration to continue until 2026 • Minor infill supply to increase steadily
Flinders Park	14,866	17,900	3,034	20.4	• Minor infill supply to increase steadily
Henley Beach	15,273	16,936	1,663	10.9	• Minor infill supply to increase steadily
Hindmarsh - Brompton	18,158	23,924	5,766	31.8	• Bowden development and surrounds to continue to 2036
Royal Park - Hendon - Albert Park	6,010	6,537	527	8.8	
Seaton - Grange	16,805	20,483	3,678	21.9	• AAMI Stadium redevelopment (eastern part), to be completed by 2021 • Housing SA renewal projects
West Lakes	14,841	17,517	2,676	18.0	• AAMI Stadium redevelopment (western part), to be completed by 2026
Woodville - Cheltenham	17,929	21,606	3,677	20.5	• St Clair Estate to be largely completed by 2021 • Woodville Station to commence after 2021
Dry Creek - South	0	0	0	-	
Largs Bay - Semaphore	14,824	16,913	2,089	14.1	• Fletchers Slip development to be completed by 2026
North Haven	14,550	15,692	1,142	7.8	• Fort Largs redevelopment to commence after 2021
Port Adelaide	10,987	14,924	3,937	35.8	• Dock 1 development to be completed by 2026 • Port Approach development to commence after 2021

The Parks	18,960	21,546	2,586	13.6	• Multiple redevelopment opportunities, including: • Multiple Renewal SA sites; • SAHT development at Woodville Gardens; • Proposed re-zoning from industry to residential in Angle Park, Regency Park and Croydon Park.
Torrens Island	3	3	0	0.0	
Adelaide Airport	0	0	0	-	
Fulham	2,752	2,917	165	6.0	
Lockleys	13,016	14,771	1,755	13.5	• Minor infill supply to increase steadily.
Plympton	24,828	29,517	4,689	18.9	• Morphettville racecourse (northern portion) to commence after 2026
Richmond (SA)	16,975	19,820	2,845	16.8	• Redevelopment of Coca Cola site and other opportunities within Urban Corridor Zone at Thebarton and along Henley Beach Road
West Beach	5,118	5,644	526	10.3	
TOTAL	**233,831**	**276,513**	**42,682**	**18.3**	

Figure 7 Adelaide – West Population 2016, 2026 and 2036 by SA2



Map 8 Adelaide - West Projected Population Change 2016 to 2036, by SA2



2.7 Adelaide - Hills Region (part Adelaide - Central and Hills SA4)

Including LGAs of Adelaide Hills, Mount Barker
Including SA2s of Adelaide Hills, Aldgate – Stirling, Hahndorf – Echunga, Lobethal – Woodside, Mount Barker, Mount Barker Region, Nairne, Uraidla - Summertown

Region Summary

The Adelaide - Hills region lies to the east of Adelaide. The region's economy is primarily agricultural, with fruit growing, dairy farms and wineries, while Mount Barker and Stirling serve as the region's primary commercial and retail centres. Growth is predominantly located in Mount Barker and Nairne SA2s with significant greenfield opportunities.

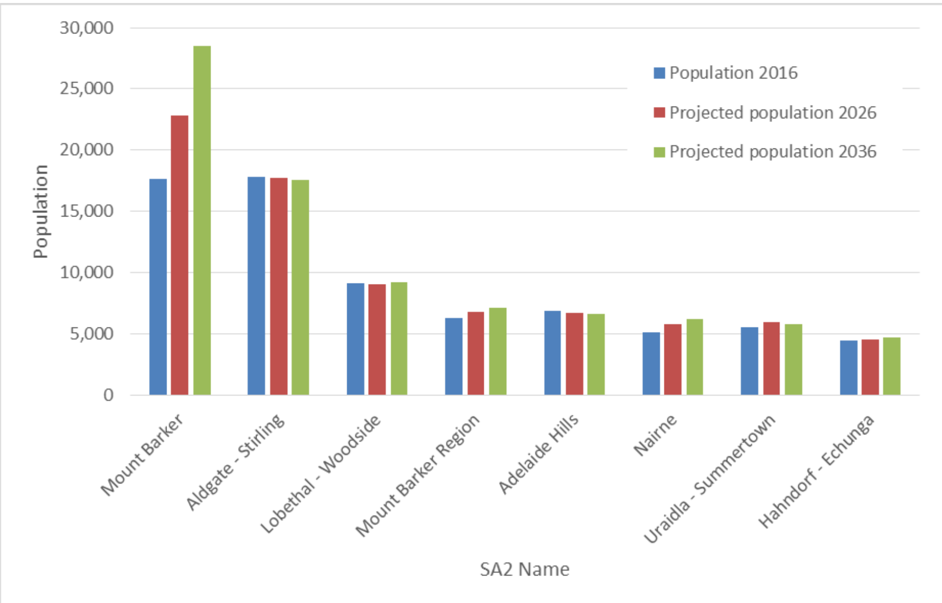
At the 2016 census, the population of the region was 73,164. It is projected to grow by 12,768 (medium series) to reach around 86,000 by 2036.

Growth opportunities throughout the region are minimal, with the exception of Mount Barker and Nairne SA2s (see Table 15, Figure 8 and Map 9 for details).

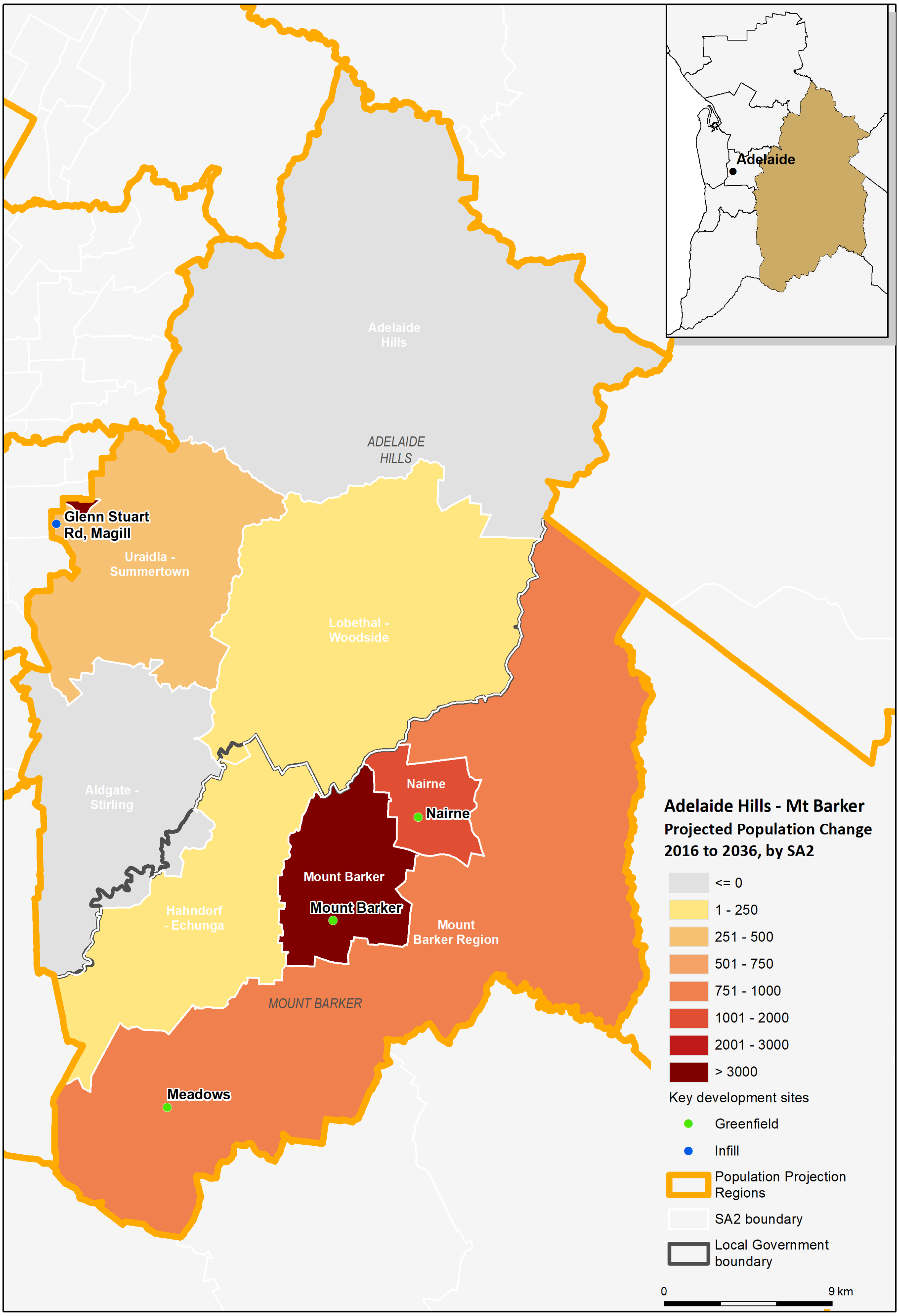
Table 15 Adelaide - Hills Projected Population and Land Supply Assumptions

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Adelaide Hills	6,914	6,648	-266	-3.8	
Aldgate - Stirling	17,966	17,567	-399	-2.2	
Hahndorf - Echunga	4,550	4,730	180	4.0	
Lobethal - Woodside	9,101	9,264	163	1.8	
Mount Barker	17,639	28,526	10,887	61.7	• Significant greenfield supply
Mount Barker Region	6,341	7,118	777	12.3	• Greenfield supply to remain steady
Nairne	5,124	6,228	1,104	21.5	• Greenfield supply to decrease after 2026
Uraidla - Summertown	5,529	5,852	323	5.8	• Hamilton Hill Estate at Magill to be completed by 2026
TOTAL	**73,164**	**85,932**	**12,768**	**17.5**	

Figure 8 Adelaide – Hills Population 2016, 2026 and 2036 by SA2



Map 9 Adelaide - Hills Projected Population Change 2016 to 2036, by SA2



2.8 Barossa - Yorke - Mid North Region (SA4)

Including LGAs of Adelaide Plains (part), Barossa (part), Barunga West, Clare and Gilbert Valleys, Copper Coast, Goyder, Light (part), Mount Remarkable, Northern Areas, Orroroo Carrieton, Peterborough, Port Pirie, Wakefield, Yorke Peninsula

Including SA2s of Barossa – Angaston, Light, Lyndoch, Mallala, Nuriootpa, Tanunda, Clare, Gilbert Valley, Goyder, Wakefield - Barunga West, Jamestown, Peterborough - Mount Remarkable, Port Pirie, Port Pirie Region, Kadina, Moonta, Wallaroo, Yorke Peninsula – North, Yorke Peninsula - South

Region Summary

The Barossa - Yorke - Mid North region is an economically diverse area with industries that include; wine in the Barossa, Eden and Clare Valleys; extensive grain and livestock farming; tourism; and the lead and zinc smelter in Port Pirie.

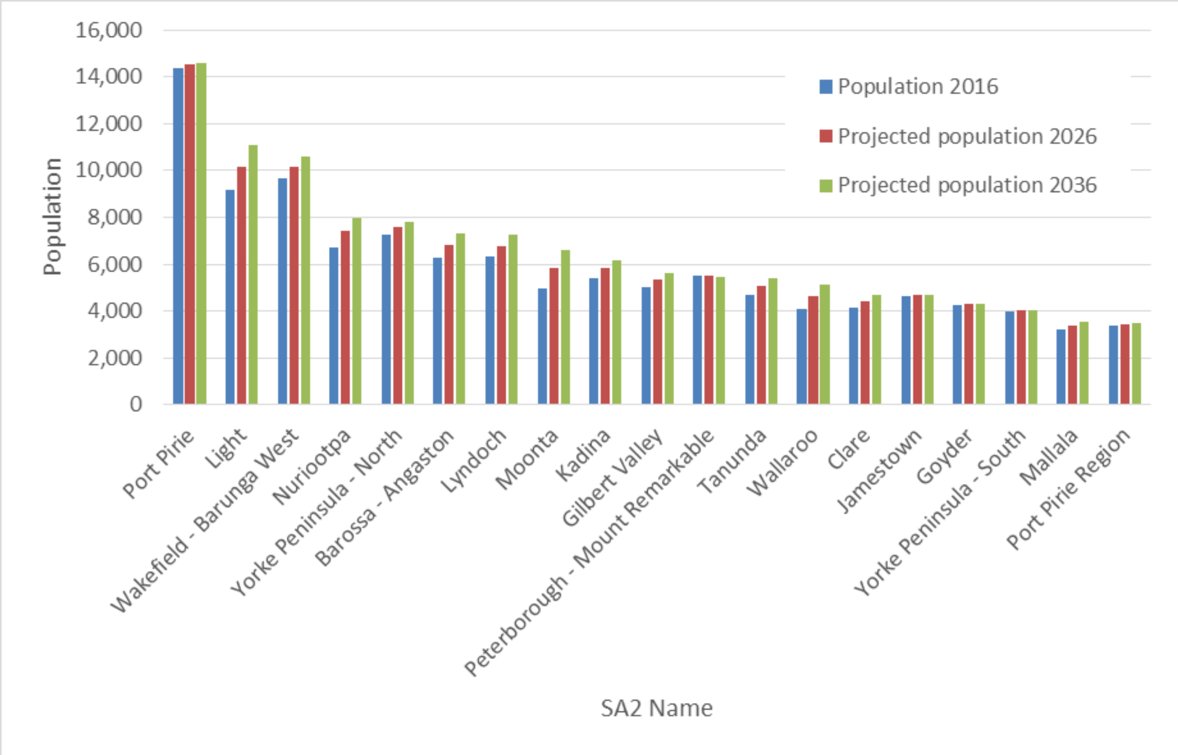
At the 2016 census, the population of the region was 113,147. Port Pirie is the largest town with a population of 13,743. The region is projected to grow by 12,562 (medium series) to reach around 126,000 by 2036.

The dominant growth opportunities in the region are expected to be located in coastal retirement towns on the Yorke Peninsula, and within the Barossa Valley and Freeling (see Table 16, Figure 9 and Map 10 for details).

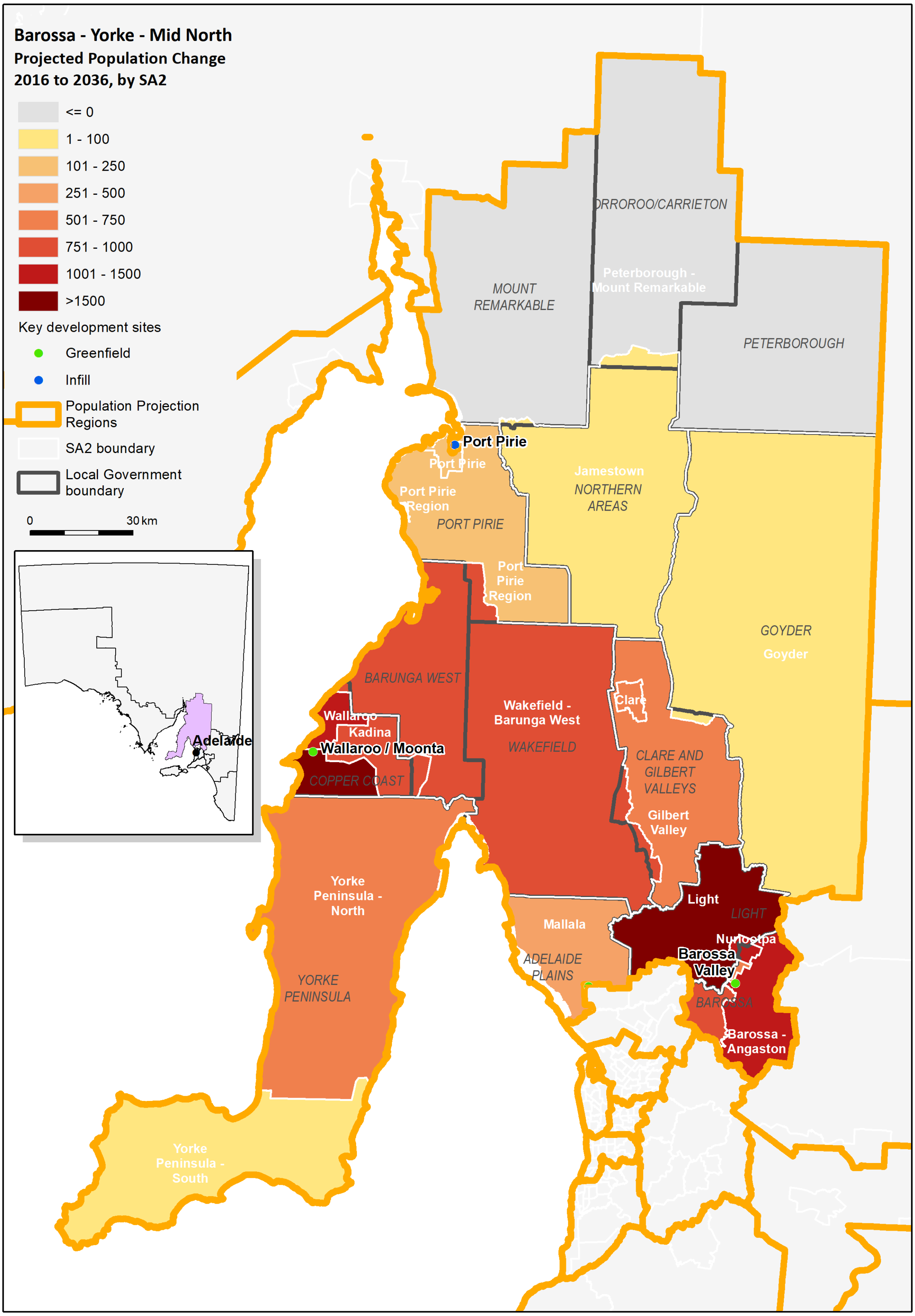
Table 16 Barossa - Yorke - Mid North Projected Population and Land Supply Assumptions

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Barossa - Angaston	6,266	7,315	1,049	16.7	
Light	9,187	11,091	1,904	20.7	• Greenfield supply to remain steady surrounding townships of Kapunda, Freeling, Greenock & Wasleys
Lyndoch	6,318	7,237	919	14.5	• Greenfield supply to decrease after 2026 surrounding townships of Williamstown, Lyndoch and Sandy Creek
Mallala	3,226	3,546	320	9.9	
Nuriootpa	6,723	7,967	1,244	18.5	• Greenfield supply to decline slowly.
Tanunda	4,704	5,391	687	14.6	• Greenfield supply to decline slowly.
Clare	4,170	4,682	512	12.3	
Gilbert Valley	4,991	5,597	606	12.1	
Goyder	4,264	4,302	38	0.9	
Wakefield - Barunga West	9,651	10,560	909	9.4	
Jamestown	4,661	4,684	23	0.5	
Peterborough - Mount Remarkable	5,506	5,479	-27	-0.5	
Port Pirie	14,347	14,590	243	1.7	
Port Pirie Region	3,365	3,491	126	3.7	
Kadina	5,416	6,200	784	14.5	
Moonta	4,938	6,593	1,655	33.5	• Greenfield supply to remain steady.
Wallaroo	4,123	5,107	984	23.9	• Greenfield supply to remain steady.
Yorke Peninsula - North	7,261	7,815	554	7.6	
Yorke Peninsula - South	4,030	4,063	33	0.8	
TOTAL	**113,147**	**125,709**	**12,562**	**11.1**	

Figure 9 Barossa - Yorke - Mid North Population 2016, 2026 and 2036 by SA2



Map 10 Barossa - Yorke - Mid North Projected Population Change 2016 to 2036, by SA2



2.9 Fleurieu - Kangaroo Island Region (part South Australia - South East SA4)

Including LGAs of Alexandrina, Victor Harbor, Yankalilla, Kangaroo Island
Including SA2s of Goolwa - Port Elliot, Kangaroo Island, Strathalbyn, Strathalbyn Region, Victor Harbor, Yankalilla

Region Summary

The Fleurieu - Kangaroo Island region is an attractive and economically diverse area. Industries include wine in Langhorne Creek, tourism, forestry, retirement services and a diverse range of agriculture across the region.

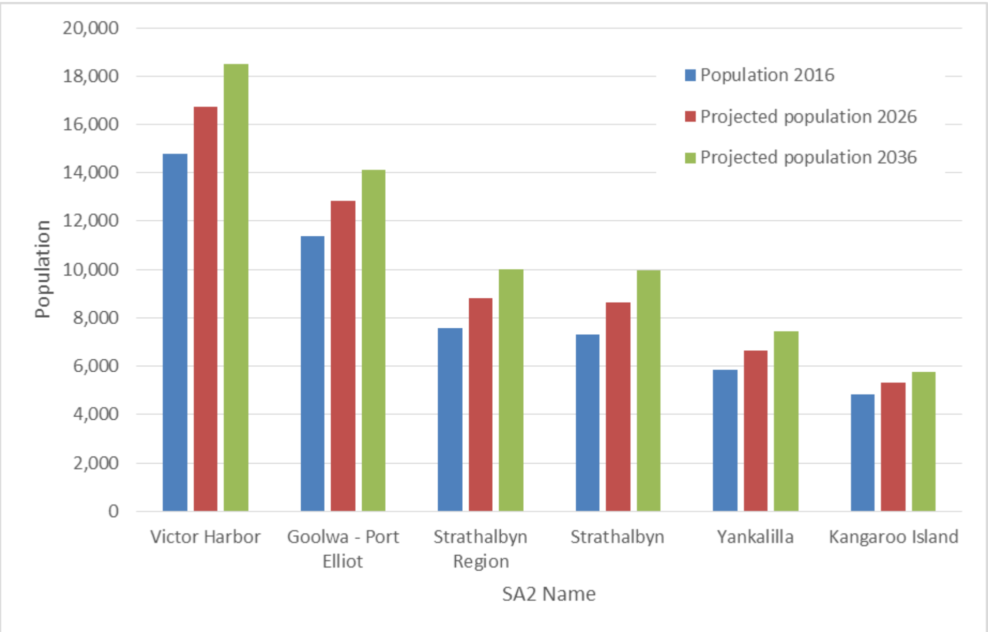
At the 2016 census, the population of the region was 51,685. Victor Harbor is the largest town with 15,267 people and Goolwa is second largest with 7,715. The inland town of Strathalbyn had 5,488 people while Kingscote, on Kangaroo Island, had a population of 1,785. This region is projected to grow by 14,130 (medium series) to reach around 66,000 by 2036.

Growth opportunities are expected to occur dominantly within mainland SA2s, with much of this growth within retirement locations of Victor Harbor, Goolwa, Normanville and Strathalbyn (see Table 17, Figure 10 and Map 11 for details).

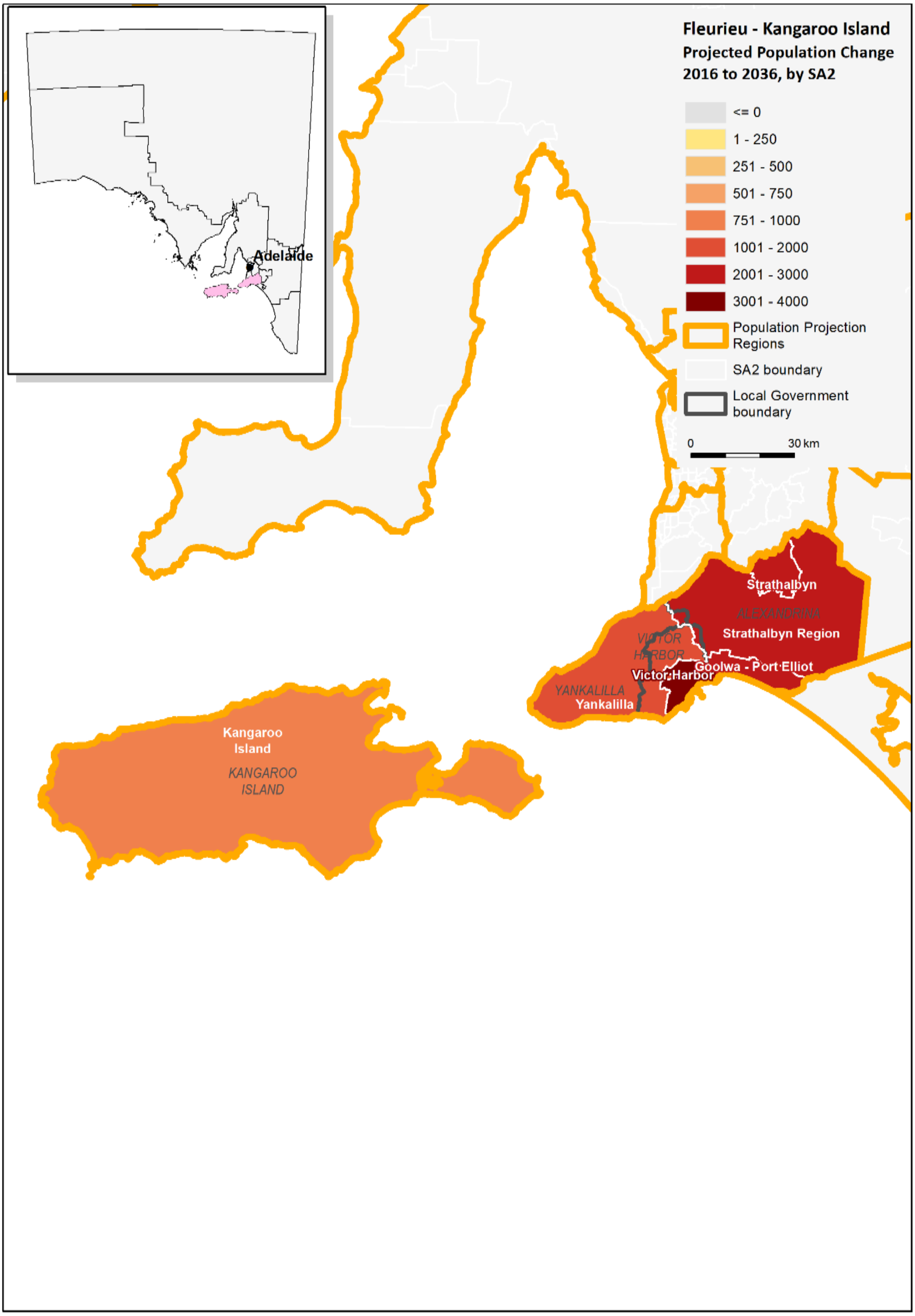
Table 17 Fleurieu - Kangaroo Island Projected Population and Land Supply Assumptions

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Goolwa - Port Elliot	11,435	14,112	2,677	23.4	• Supply of greenfield land to remain steady.in Goolwa.
Kangaroo Island	4,836	5,777	941	19.5	
Strathalbyn	7,291	9,951	2,660	36.5	• Supply of greenfield land to remain steady.
Strathalbyn Region	7,546	9,982	2,436	32.3	• Supply of greenfield land to remain steady.
Victor Harbor	14,719	18,503	3,784	25.7	• Supply of greenfield land to remain steady.
Yankalilla	5,858	7,490	1,632	27.9	• Supply of greenfield land to remain steady.
TOTAL	**51,685**	**65,815**	**14,130**	**27.3**	

Figure 10 Fleurieu - Kangaroo Island Population 2016, 2026 and 2036 by SA2



Map 11 Fleurieu - Kangaroo Island projected population change 2016 to 2036, by SA2



2.10 Murray and Mallee (part South Australia - South East SA4)

Including LGAs of Murray Bridge, Berri Barmera, Coorong, Karoonda East Murray, Loxton Waikerie (part), Mid Murray, Renmark Paringa, Southern Mallee, Pastoral Unincorporated Area (part)
Including SA2s of Barmera, Berri, Karoonda – Lameroo, Loxton, Loxton Region, Mannum, Murray Bridge, Murray Bridge Region, Renmark, Renmark Region, The Coorong, Waikerie

Region Summary

The Murray and Mallee's economy is primarily agricultural, including dairying, piggeries, horticulture and viticulture, with an expanding processing and manufacturing sector largely related to its agricultural goods.

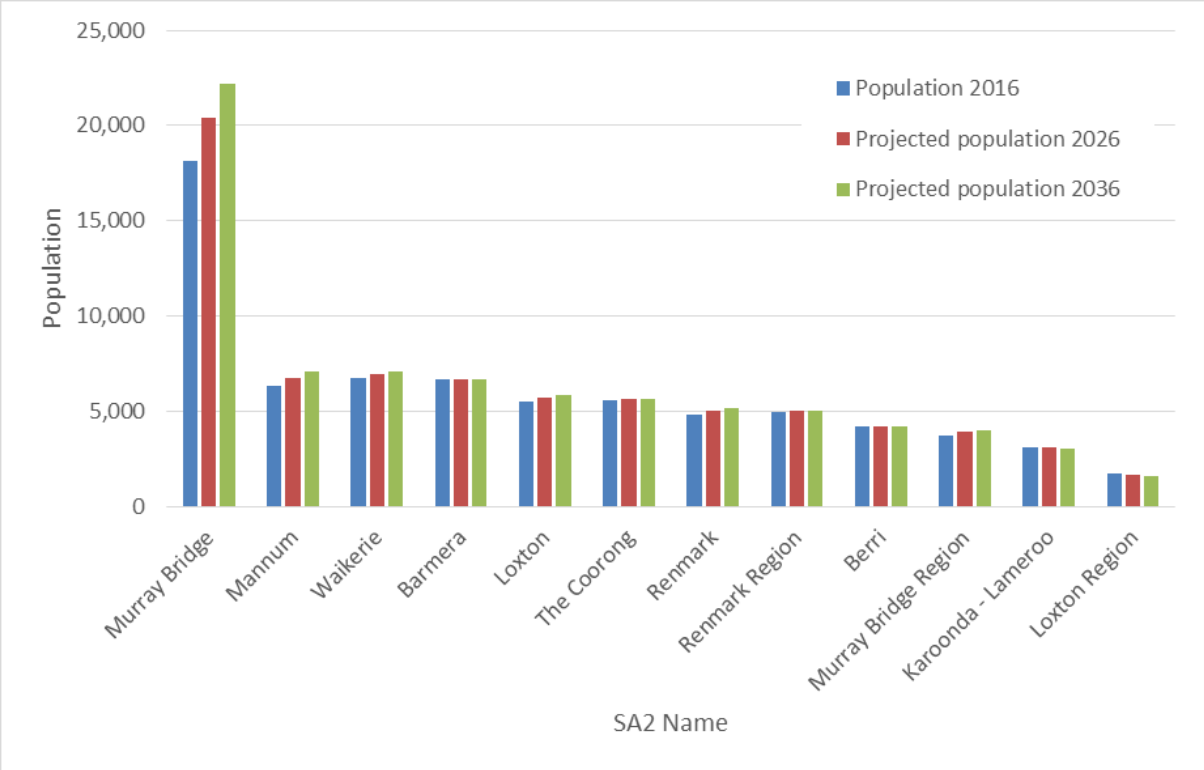
At the 2016 census, the population of the region was 71,511. Murray Bridge is the largest town with a population of 16,803. There are several towns with significant populations located in the Riverland. This region is projected to grow by 6,076 (medium series) to reach around 77,500 by 2036.

Growth opportunities in the region are expected to be located within Murray Bridge, which has ample land for greenfield expansion. Mannum, Waikerie, Loxton and Renmark SA2s are also expected to see some growth (see Table 18, Figure 11 and Map 12 for details).

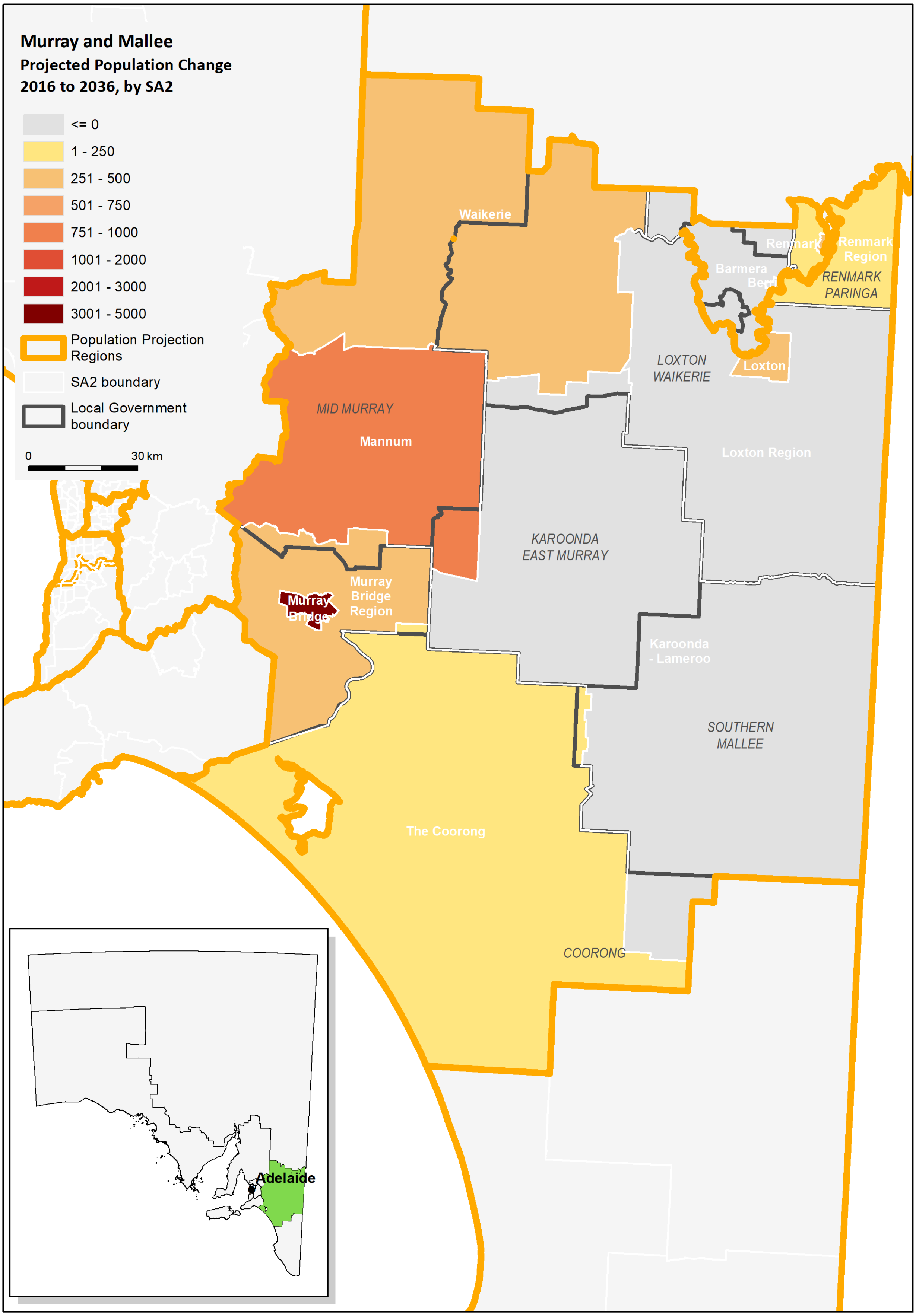
Table 18 Murray and Mallee Projected Population and Land Supply Assumptions

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change	Land supply assumptions supporting projected growth
Barmera	6,671	6,639	-32	-0.5	
Berri	4,211	4,190	-21	-0.5	
Karoonda - Lameroo	3,096	3,039	-57	-1.8	
Loxton	5,491	5,889	398	7.3	
Loxton Region	1,735	1,629	-106	-6.1	
Mannum	6,333	7,116	783	12.4	
Murray Bridge	18,196	22,150	3,954	21.7	• Greenfield supply to remain steady
Murray Bridge Region	3,716	4,010	294	7.9	• Greenfield supply available at Gifford Hill
Renmark	4,820	5,184	364	7.6	
Renmark Region	4,960	5,005	45	0.9	
The Coorong	5,538	5,631	93	1.7	
Waikerie	6,744	7,106	362	5.4	
TOTAL	**71,511**	**77,587**	**6,076**	**8.5**	

Figure 11 Murray and Mallee Population 2016, 2026 and 2036 by SA2



Map 12 Murray and Mallee Projected Population Change 2016 to 2036, by SA2



2.11 Limestone Coast Region (part South Australia - South East SA4)

Including LGAs of Mount Gambier, Grant, Kingston, Naracoorte Lucindale, Robe, Tatiara, Wattle Range
Including SA2s of Grant, Kingston – Robe, Millicent, Naracoorte, Naracoorte Region, Penola, Tatiara, Wattle Range, Mount Gambier – East, Mount Gambier - West

Region Summary

The Limestone Coast region's economy includes viticulture, agriculture, aquaculture, forestry, tourism and has a growing processing and manufacturing sector.

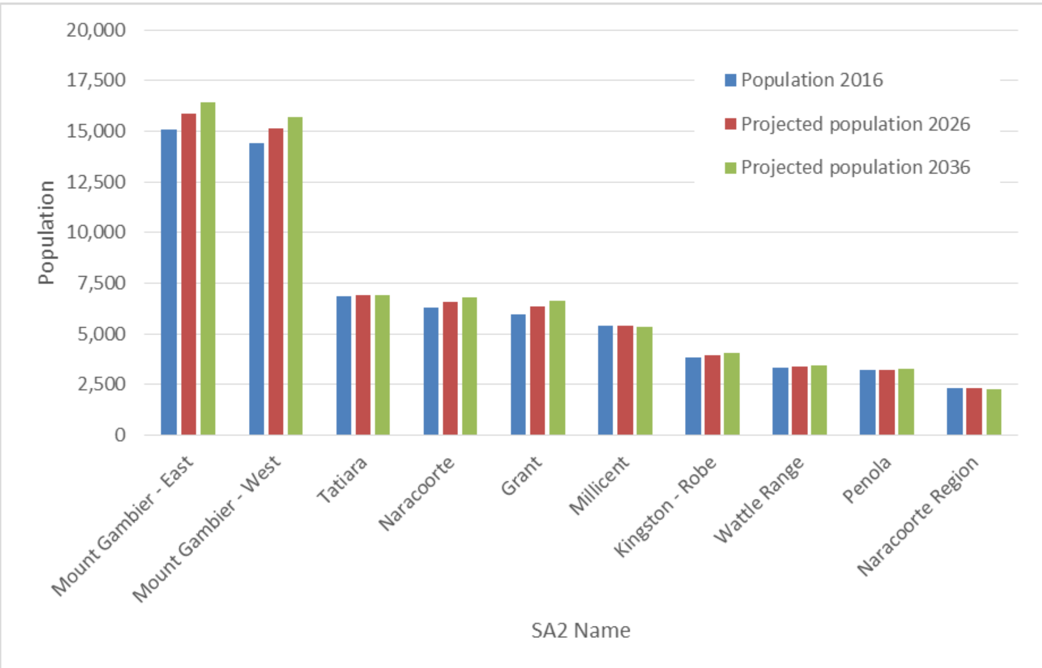
At the 2016 census, the population of the region was 66,689. Mount Gambier is the largest town with a population of 26,148. The region is projected to grow by 4,198 (medium series) to reach around 71,000 by 2036.

The main growth area in the region is expected to be Mount Gambier, which has many small and large scale residential developments. It relies heavily on the forestry industry along with being the major service centre in the region (see Table 19, Figure 12 and Map 13 for details).

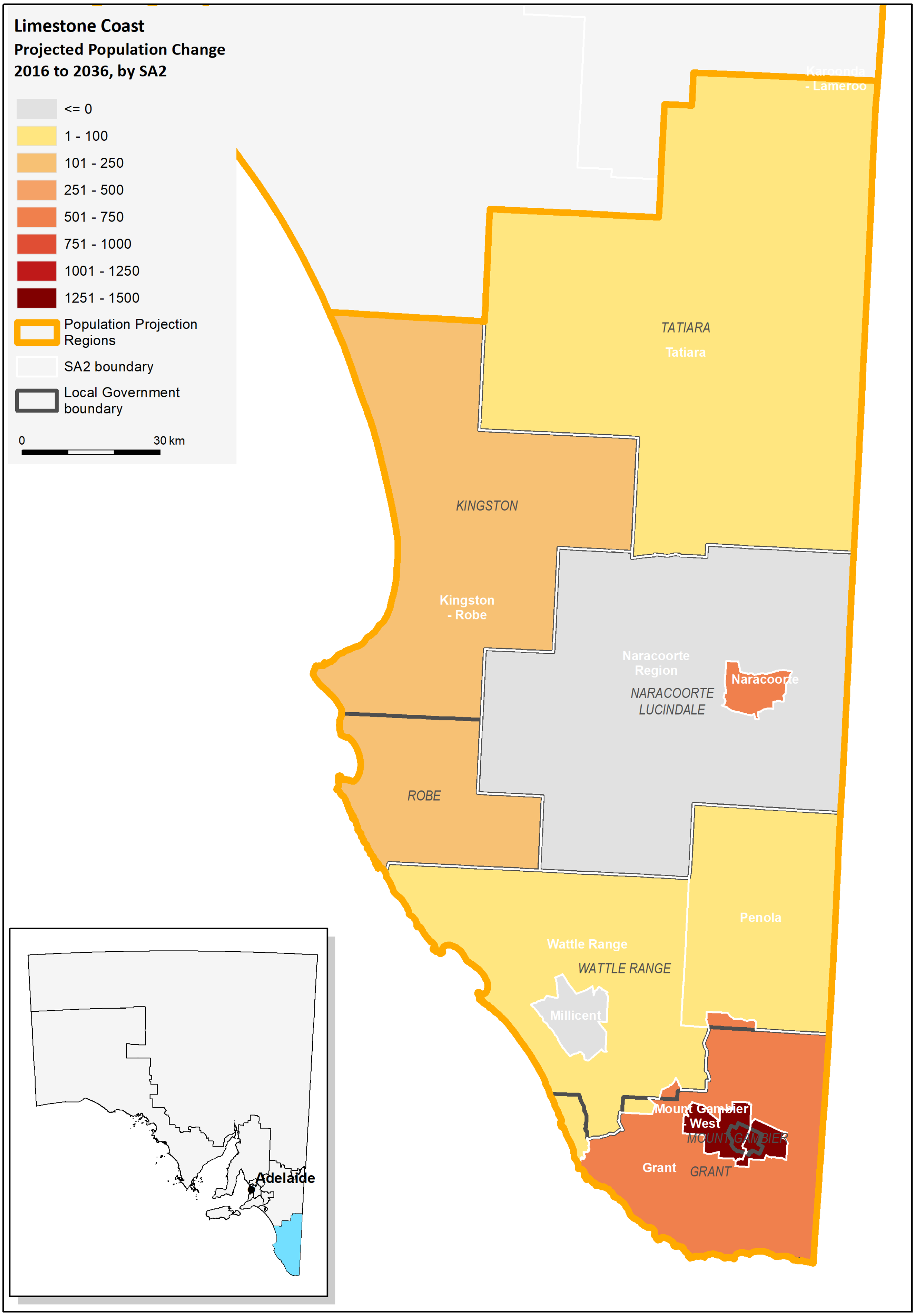
Table 19 Limestone Coast Projected Population

SA2 Name	2016 ERP	2036 projection	2016 to 2036 change	2016-2036 % change
Grant	5,984	6,658	674	11.3
Kingston - Robe	3,828	4,041	213	5.6
Millicent	5,396	5,364	-32	-0.6
Naracoorte	6,208	6,811	603	9.7
Naracoorte Region	2,336	2,277	-59	-2.5
Penola	3,227	3,253	26	0.8
Tatiara	6,817	6,934	117	1.7
Wattle Range	3,361	3,434	73	2.2
Mount Gambier - East	15,110	16,413	1,303	8.6
Mount Gambier - West	14,422	15,704	1,282	8.9
TOTAL	**66,689**	**70,887**	**4,198**	**6.3**

Figure 12 Limestone Coast Population 2016, 2026 and 2036 by SA2



Map 13 Limestone Coast Projected Population Change 2016 to 2036, by SA2



2.12 Eyre Peninsula and South West Region (part South Australia – Outback Region SA4)

Including LGAs of Ceduna, Cleve, Elliston, Franklin Harbour, Kimba, Lower Eyre Peninsula, Maralinga Tjarutja, Port Lincoln, Pastoral Unincorporated Area (part), Streaky Bay, Tumby Bay, Wudinna
Including SA2s of Ceduna, Eyre Peninsula, Kimba - Cleve - Franklin Harbour, Le Hunte – Elliston, Port Lincoln, West Coast (SA), Western, Whyalla, Whyalla - North

Region Summary

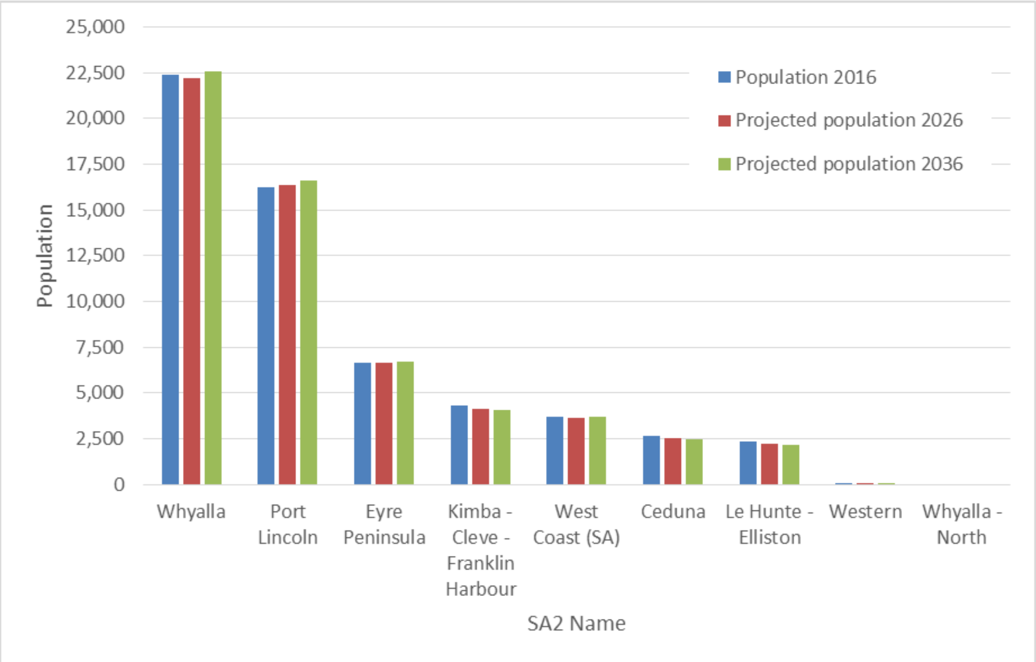
The Eyre Peninsula and South West region has a diverse range of industries including mining, pastoralism, agriculture, commercial fishing and aquaculture. The Murray and Mallee's economy is primarily agricultural, including dairying, piggeries, horticulture and viticulture, with an expanding processing and manufacturing sector largely related to its agricultural goods.

At the 2016 census, the population of the region was 58,415. The largest towns are; Whyalla (21,505), Port Lincoln (14,062) and Ceduna (2,156). This region is projected to experience a slight decline in population to around 58,300 (medium series) by 2036 (see Table 20, Figure 13 and Map 14 for details).

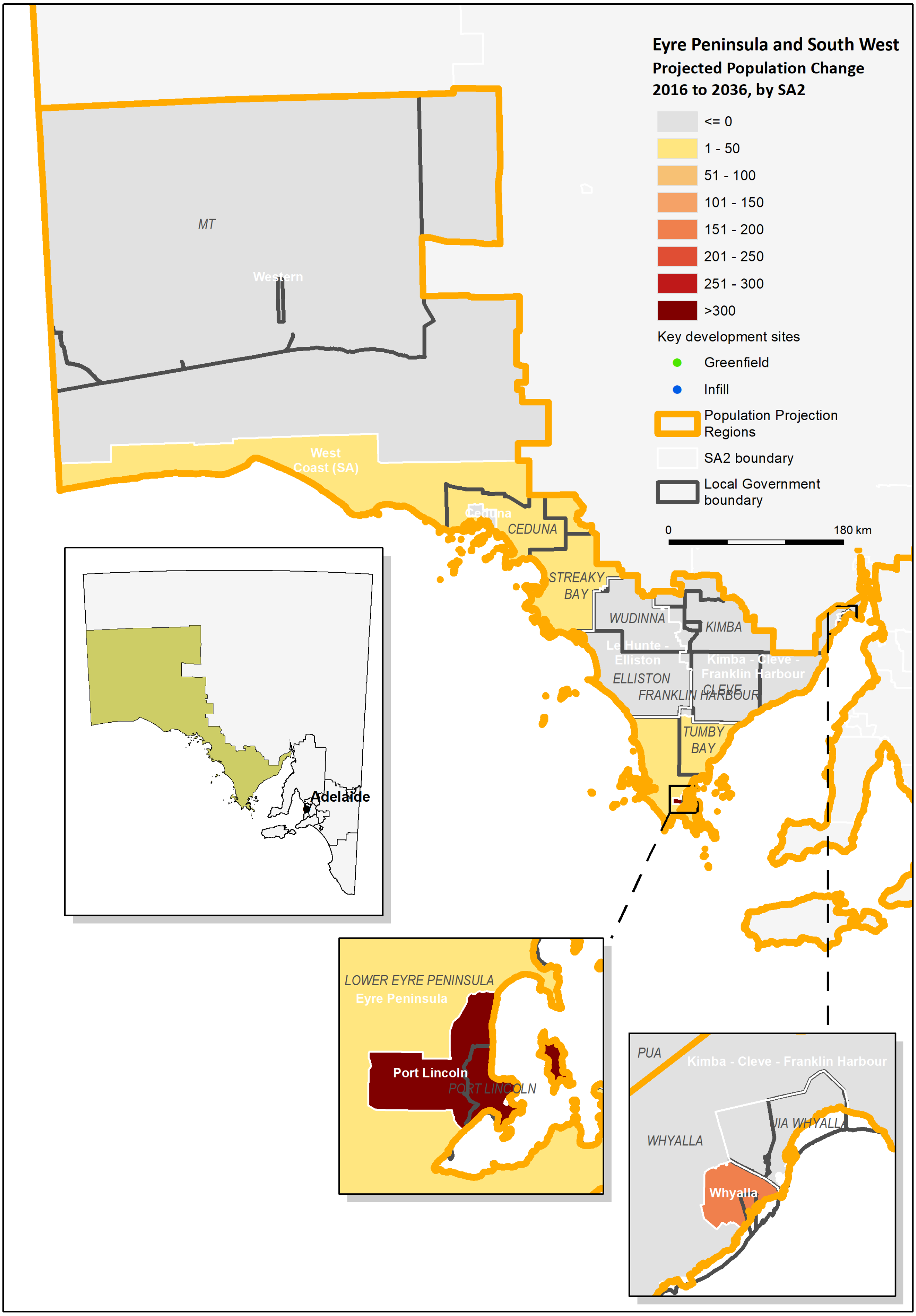
Table 20 Eyre Peninsula and South West Projected Population

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change
Ceduna	2,680	2,486	-194	-7.2
Eyre Peninsula	6,667	6,697	30	0.5
Kimba - Cleve - Franklin Harbour	4,360	4,043	-317	-7.3
Le Hunte - Elliston	2,317	2,144	-173	-7.5
Port Lincoln	16,198	16,598	400	2.5
West Coast (SA)	3,681	3,699	18	0.5
Western	80	51	-29	-36.3
Whyalla	22,432	22,580	148	0.7
Whyalla - North	0	0	0	-
TOTAL	**58,415**	**58,300**	**-115**	**-0.2**

Figure 13 Eyre Peninsula and South West Population 2016, 2026 and 2036 by SA2



Map 14 Eyre Peninsula and South West Projected Population Change 2016 to 2036, by SA2



2.13 SA Outback North and East Region (part South Australia – Outback Region SA4)

Including LGAs of APY, Coober Pedy, Flinders Ranges, Loxton Waikerie, Port Augusta, Roxby Downs, Pastoral Unincorporated Area (part), UIA Riverland (part),
Including SA2s of APY Lands, Coober Pedy, Quorn - Lake Gilles, Outback, Port Augusta, Roxby Downs

Region Summary

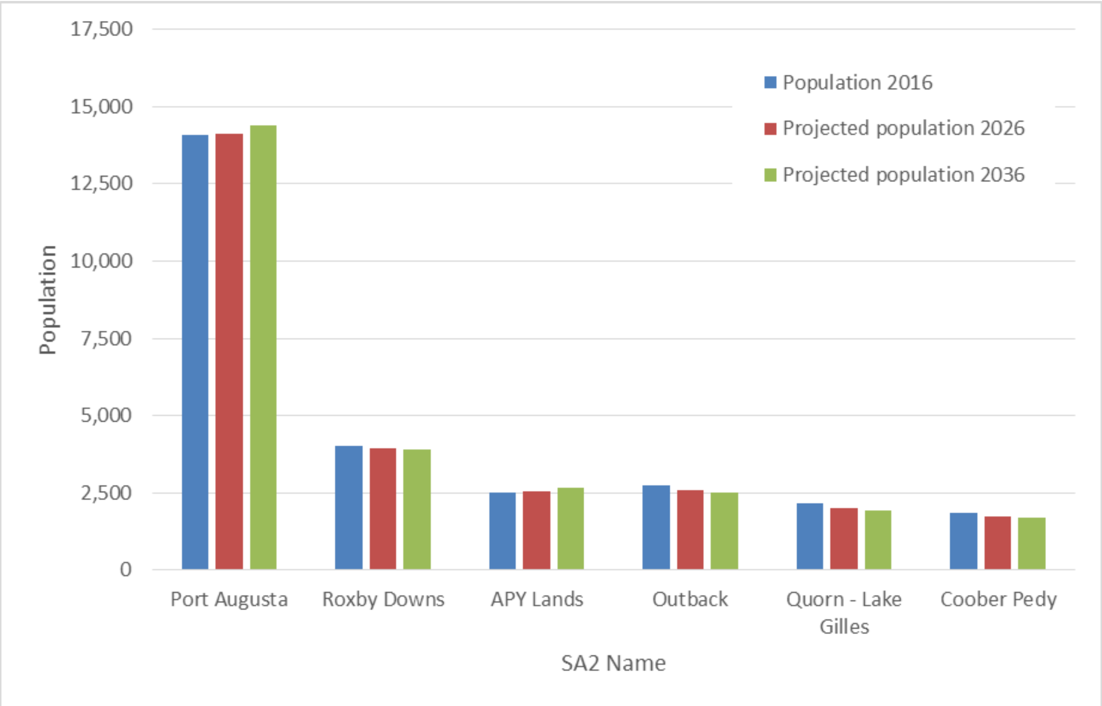
The SA Outback North and East region has mining and pastoralism as the main industries.

At the 2016 census, the population of the region was 27,339. The largest population centres were Port Augusta (12,893), Roxby Downs (3,587) and Coober Pedy (1,625). This region is projected to decline by around 280 people (medium series) to have a population of just over 27,000 by 2036 (see Table 21, Figure 14 and Map 15 for details).

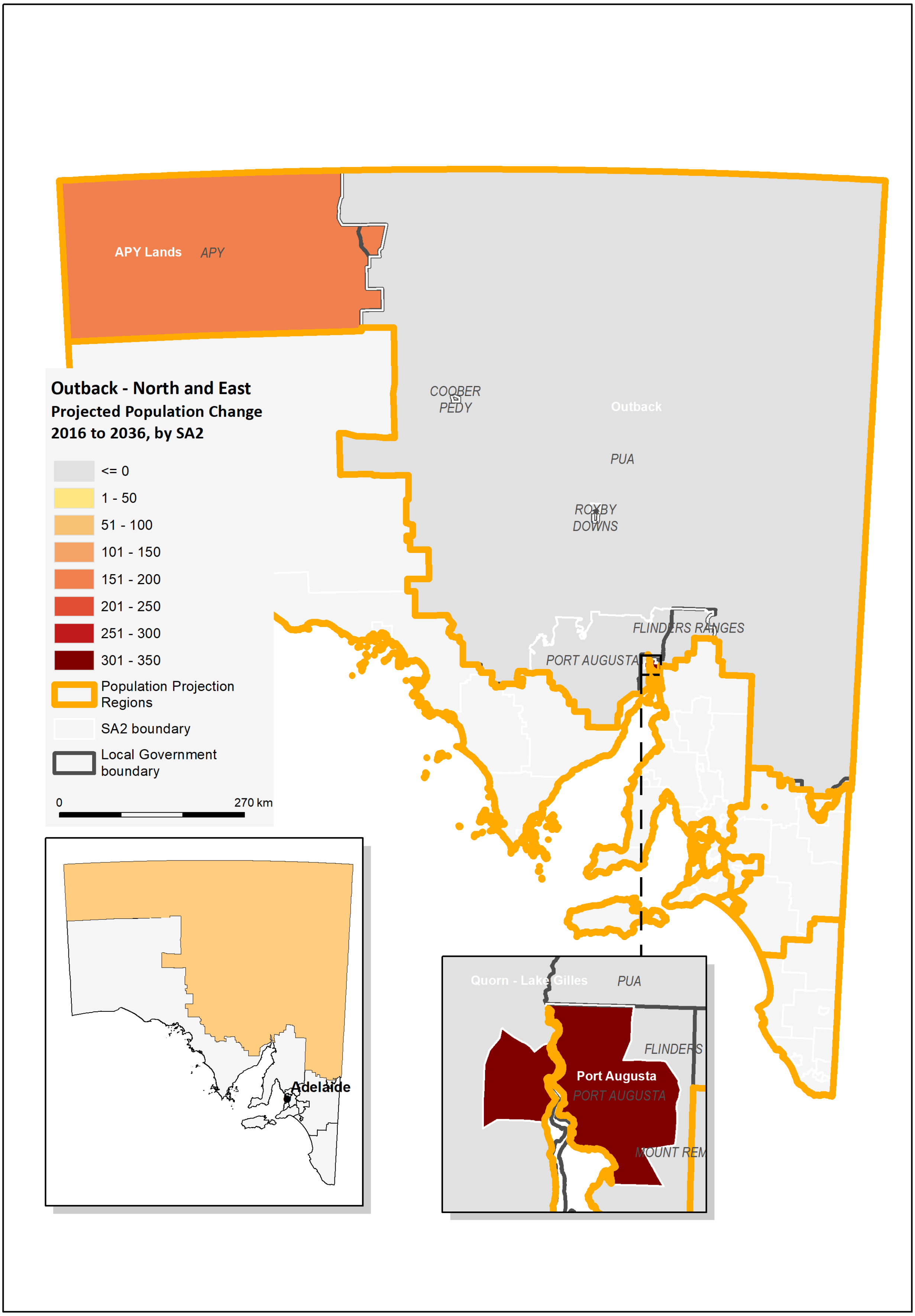
Table 21 Outback - North and East Projected Population

SA2 Name	2016 ERP	2036 projection	2016-2036 change	2016-2036 % change
APY Lands	2,498	2,646	148	5.9
Coober Pedy	1,818	1,705	-113	-6.2
Quorn - Lake Gilles	2,201	1,943	-258	-11.7
Outback	2,712	2,503	-209	-7.7
Port Augusta	14,053	14,358	305	2.2
Roxby Downs	4,057	3,907	-150	-3.7
TOTAL	**27,339**	**27,062**	**-277**	**-1.0**

Figure 14 Outback - North and East Population 2016, 2026 and 2036 by SA2



Map 15 Outback - North and East Projected Population Change 2016 to 2036, by SA2



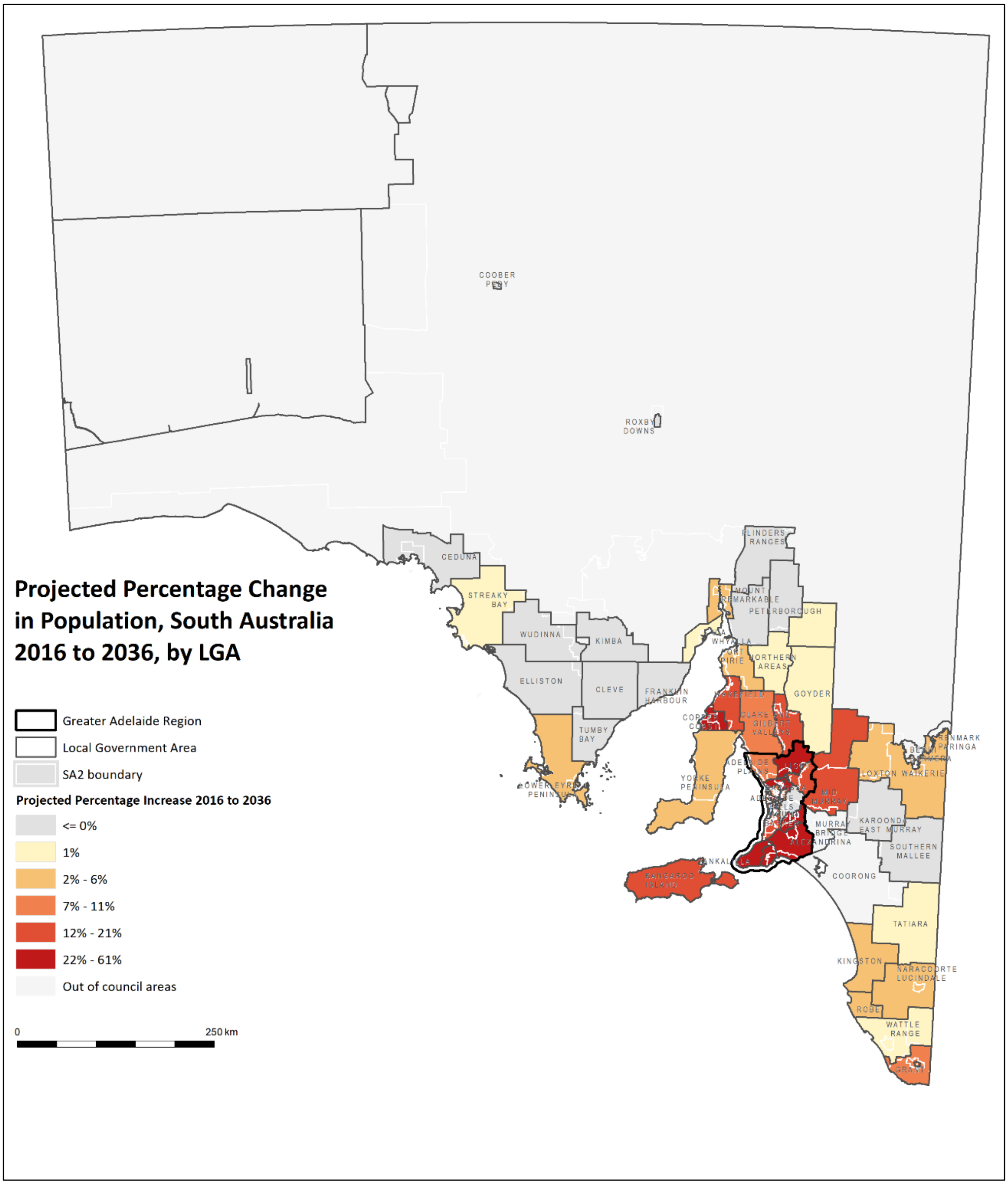
3 LGA level projection Results by Region, 2016 to 2036

Local Government Area projections were derived from the SA2 projections. In a number of cases the SA2 and LGA boundaries do not align so an estimated share of growth was applied to each LGA.

Table 22 below lists the projected population growth for each LGA for the Greater Adelaide Region and Rest of SA. The distribution of this growth can be seen in Maps 16 and 17.

The top 10 LGAs for total population growth over the 20 year period are expected to absorb approximately 72% of the state's total population growth.

Map 16 South Australia Projected Change in Population by LGA, 2016 - 2036



Map 17 Greater Adelaide Region Projected Change in Population by LGA, 2016 - 2036

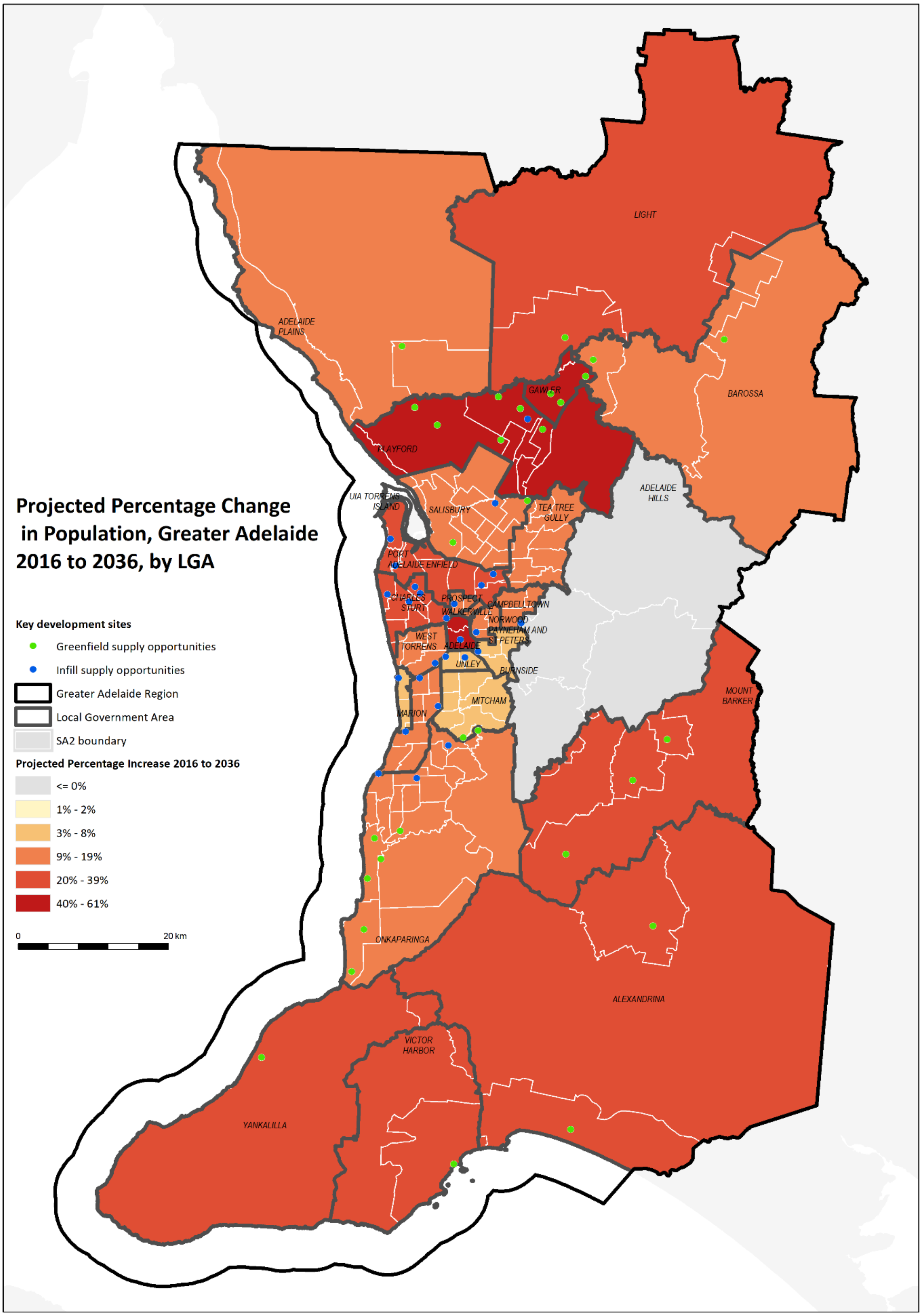


Table 22 LGA Population Projections for Greater Adelaide Region and Remainder of SA

Greater Adelaide Region (GAR)

LGA	2016 ERP	2036 Projection	2016-2036 Change	Percentage Change 2016-2036 (%)
Playford	90,549	130,080	39,531	43.7
Port Adelaide Enfield	123,994	152,501	28,506	23.0
Charles Sturt	114,977	138,292	23,316	20.3
Onkaparinga	169,368	191,162	21,794	12.9
Marion	90,515	107,090	16,575	18.3
Salisbury	140,370	156,120	15,750	11.2
Gawler	23,352	37,246	13,894	59.5
Adelaide	23,552	37,117	13,565	57.6
Mount Barker	33,891	46,835	12,944	38.2
Tea Tree Gully	99,144	110,739	11,595	11.7
West Torrens	59,413	68,999	9,585	16.1
Alexandrina	26,559	34,403	7,844	29.5
Campbelltown	51,079	58,435	7,355	14.4
Mitcham	66,486	71,319	4,832	7.3
Light	15,041	19,276	4,234	28.2
Barossa	24,210	28,428	4,218	17.4
Victor Harbor	15,018	18,774	3,757	25.0
Norwood Payneham & St Peters	36,396	40,063	3,667	10.1
Burnside	45,216	48,059	2,843	6.3
Holdfast Bay	36,532	39,258	2,727	7.5
Prospect	21,124	23,650	2,526	12.0
Unley	38,939	40,932	1,993	5.1
Yankalilla	5,273	6,861	1,588	30.1
Adelaide Plains	8,912	9,924	1,012	11.4
Walkerville	7,781	8,622	841	10.8
Adelaide Hills	39,639	39,517	-122	-0.3
GAR Total	**1,407,330**	**1,663,701**	**256,371**	**18.2**

Remainder of SA

LGA	2016 ERP	2036 Projection	2016-2036 Change	Percentage Change 2016-2036 (%)
Murray Bridge	21,565	25,786	4,221	19.6
Copper Coast	14,472	17,893	3,421	23.6
Mount Gambier	27,053	29,682	2,629	9.7
Clare and Gilbert Valleys	9,250	10,374	1,125	12.2
Mid Murray	8,846	9,967	1,121	12.7
Kangaroo Island	4,836	5,777	941	19.5
Wakefield	6,927	7,579	652	9.4
Grant	8,422	9,046	623	7.4
Yorke Peninsula	11,291	11,878	587	5.2

LGA	2016 ERP	2036 Projection	2016-2036 Change	Percentage Change 2016-2036
Naracoorte and Lucindale	8,544	9,088	544	6.4
Renmark Paringa	9,780	10,189	409	4.2
Port Pirie City and Dists	17,767	18,141	374	2.1
Loxton Waikerie	11,726	12,037	311	2.7
Port Lincoln	14,515	14,818	303	2.1
Port Augusta	14,357	14,608	251	1.7
Barunga West	2,610	2,856	247	9.5
Anangu Pitjantjatjara	2,498	2,646	148	5.9
Lower Eyre Peninsula	5,678	5,806	128	2.3
Tatiara	6,817	6,934	117	1.7
Robe	1,390	1,501	111	8.0
Kingston	2,438	2,540	102	4.2
The Coorong	5,531	5,623	93	1.7
Wattle Range	12,024	12,097	72	0.6
Whyalla	22,509	22,580	71	0.3
Goyder	4,241	4,279	38	0.9
Northern Areas	4,624	4,647	23	0.5
Tumby Bay	2,666	2,671	6	0.2
Peterborough	1,712	1,712	0	0.0
Maralinga Tjarutja	66	66	0	-0.3
Mount Remarkable	2,910	2,908	-2	-0.1
Karoonda East Murray	1,118	1,114	-4	-0.3
Southern Mallee	2,063	2,040	-22	-1.1
Streaky Bay	2,191	2,168	-23	-1.0
Orroroo/Carrieton	922	897	-25	-2.7
Cleve	1,821	1,781	-40	-2.2
Berri and Barmera	10,838	10,785	-53	-0.5
Franklin Harbour	1,338	1,281	-58	-4.3
Elliston	1,075	1,003	-72	-6.7
Kimba	1,075	981	-94	-8.7
Coober Pedy	1,818	1,705	-113	-6.2
Flinders Ranges	1,717	1,597	-121	-7.0
Wudinna	1,274	1,141	-133	-10.4
Roxby Downs	4,052	3,902	-150	-3.7
Ceduna	3,564	3,368	-196	-5.5
Unincorporated SA	7,166	6,566	-600	-8.4
Remainder of SA Total	**305,513**	**322,776**	**17,263**	**5.7**