

- the contribution of the Government's planning levels of the permanent and humanitarian migration programs to immigrant arrivals, which accounts for all permanent migrant arrivals — whether they arrive in Australia as a permanent or as temporary migrant who transitions to a permanent resident
- the flows of arriving and departing temporary migrants who reside in Australia for several years but never transition to permanent residents
- the flows of departing and returning Australia citizens
- the number of permanent residents who subsequently emigrate.

A diverse set of factors determines how long immigrants and emigrants stay in or out of Australia, including education and employment opportunities or family connections. Since 2003-04, 7.8 million people have been counted into or out of the population as immigrants or emigrants. Some 70 per cent have done this only once, and 27 per cent twice. A relatively small number have done this 3 or more times.

After accounting for the flow of temporary migrants who transition to permanent residents, it is estimated that there is an average annual net inward flow of temporary migrants of 66,000 people since 2004-05. This represents students, temporary skilled workers, working holiday makers and New Zealanders who often spend between 1 and 8 years in Australia (and longer in some cases) before permanently departing Australia.

Australian citizens are usually net emigrants, with an average of around 15,000 more departures than there are arrivals since 2004-05. It is estimated that some 20,000 permanent residents emigrate each year on average over the same period.

The permanent and humanitarian components of the long-run net overseas migration assumption are determined by planning levels set by the Australian Government. Between 2020-21 and 2022-23, the planning level for the permanent program is 160,000 and from 2023-24 it is 190,000.<sup>22</sup> From 2020-21, the humanitarian program level is set at an ongoing level of 13,750 places.<sup>23</sup> Consistent with Government decision-making processes to date, planning levels and the composition of the future migration program are expected to continue to be reviewed annually.

The long-run net overseas migration assumption is the summation of those components — the planning levels, temporary flows, along with Australian and permanent resident emigrants — to be 235,000. With government planning levels accounting for the largest component to the long-run assumption, it is highly sensitive to any future decisions by the Australian Government to increase or decrease the planning levels for the migration program. This use of the program levels in the assumption also incorporates those migrants who first enter Australia as temporary residents and subsequently transition to permanent residency.

The level of projected long-run arrivals and departures to 2030-31 is determined by adjusting the national trends from the central case reference case from 2023-24 onwards through a steady growth assumption to achieve a level of 235,000 net overseas migration by 2028-29.

State arrivals and departures to 2028-29 reflect trends in the historical and forecast data (from differing visa group compositional effects) that aggregate to a national net overseas migration level of 235,000 by 2028-29. State net overseas migration shares are held constant to 2030-31.

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<sup>22</sup> This is consistent with the Government's decision, announced in Budget 2019-20, to cut the permanent program by 120,000 over 4 years.

<sup>23</sup> Announced in Budget 2020-21.