# Regional Movers Index

28th October 2021

Powered by:

Commonwealth Bank

REGIONAL AUSTRALIA INSTITUTE

# What is Regional Movers Index?

The **Regional Movers Index** presents fresh analysis of movements between Australia's regions and capital cities.

The **Index** is a partnership between CBA and the Regional Australia Institute (RAI), powered by analysis of proprietary data to create an up-to-date and granular picture of a large sample of relocations.

The **Index** updates the trends identified in the RAI's 2019 Big Movers report – that in recent decades more people have been moving from Australia's capital cities to regions than in the opposite direction.

---

- The **Index** is powered by CBA data from relocations amongst its 10 million customers.
- Quarterly and annual changes are presented in the Index.
- The **Index** will be an invaluable resource for both the public and private sectors. By tracking people movements it enables early identification of growth trends, and flags places emerging as hot spots needing fresh thinking on housing and infrastructure.

See Appendix A1 for definitions and methodology.

# The Regional Movers Index edges higher in the September 2021 quarter

A

Despite lockdowns and travel restrictions in the major capitals, **overall population flows from capital cities to regional areas continued to increase in the September 2021 quarter.**

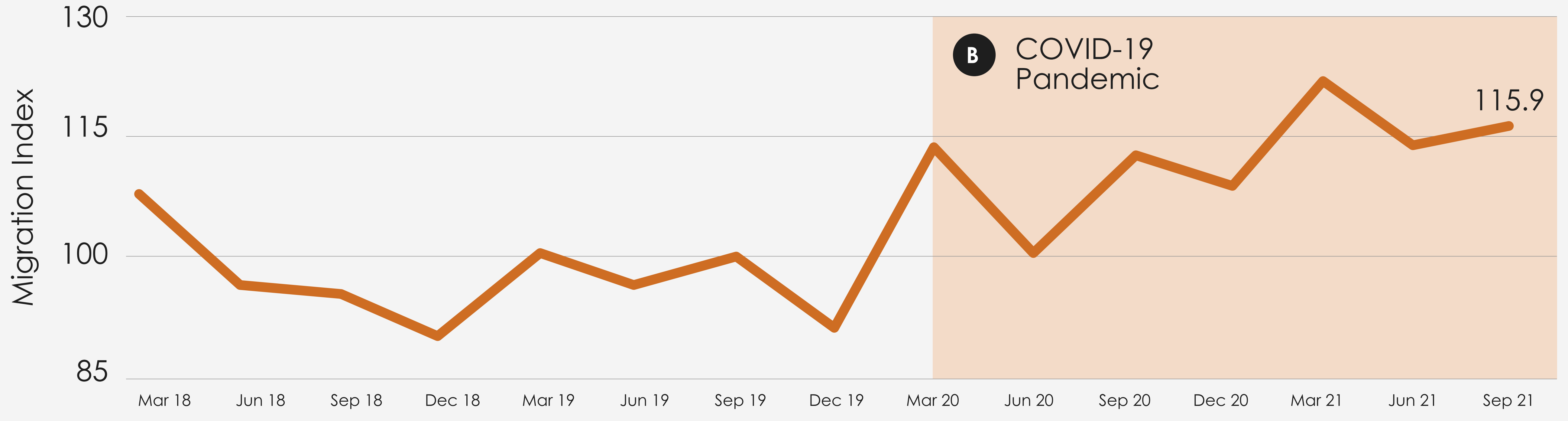
B

The Regional Movers Index indicates the number of capital city people moving to the regions edged higher **by 2 per cent in the September 2021 quarter and 3 per cent higher than a year earlier.**

C

People moving from capital cities to regional areas **accounted for 6.2 per cent of all movers**, a share that is unchanged compared with a year earlier. Population flows in the reverse direction accounted for a slightly larger share of overall movements, up by 0.3 percentage points over the same period.

## A Regional Movers Index: population flows from capital cities to Regional Australia




Index = 100, Mar 16

## C Breakdown of total internal migration

To

| From | September 2020: Regional Australia | September 2020: Capital Cities | September 2021: Regional Australia | September 2021: Capital Cities |
|---|---|---|---|---|
| Regional Australia | 22.2% | 3.6% | 22.6% | 3.9% |
| Capital Cities | 6.2% | 68.1% | 6.2% | 67.3% |

# Net migration to regional Australia

**COVID-era migration patterns continue to show a preference for regional areas:** capital-city dwellers are moving to the regions in greater numbers, while regional people are electing to stay in place in greater numbers.

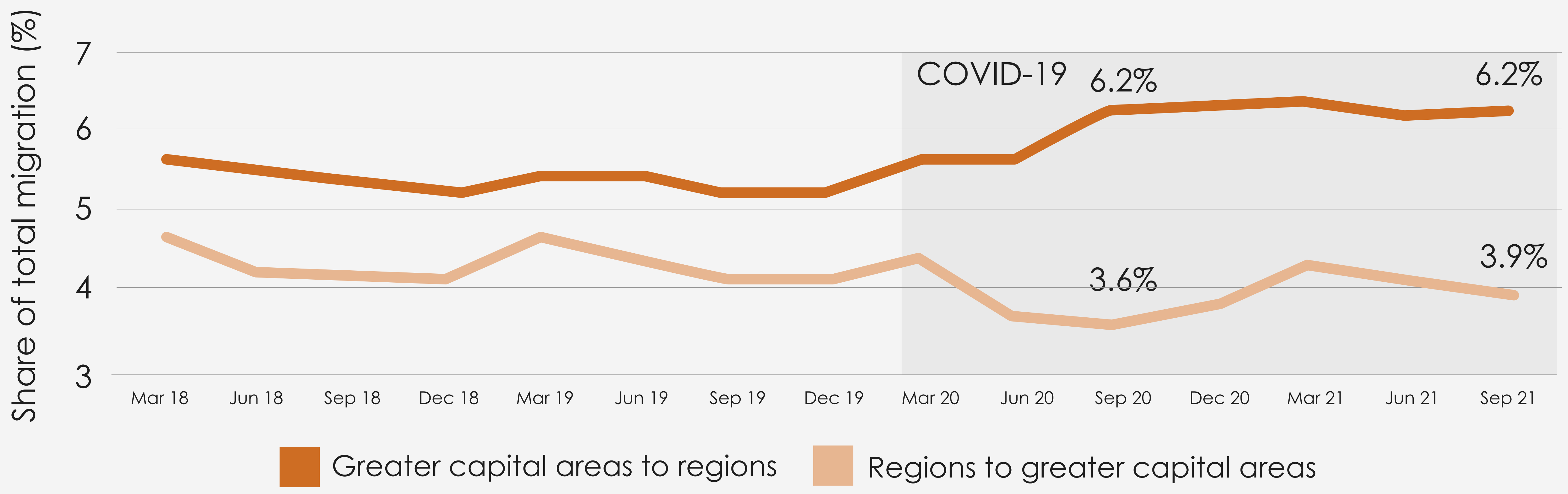
A

Over the past year, those moving from the capitals to the regions have consistently accounted for a 6.2 per cent share of total movements. Those moving in the other direction have generally accounted for a smaller share, around 4 per cent. Over the past six months however, this share has shrunk from 4.2 per cent to 3.9 per cent, reflecting fewer people moving from regions to capitals.

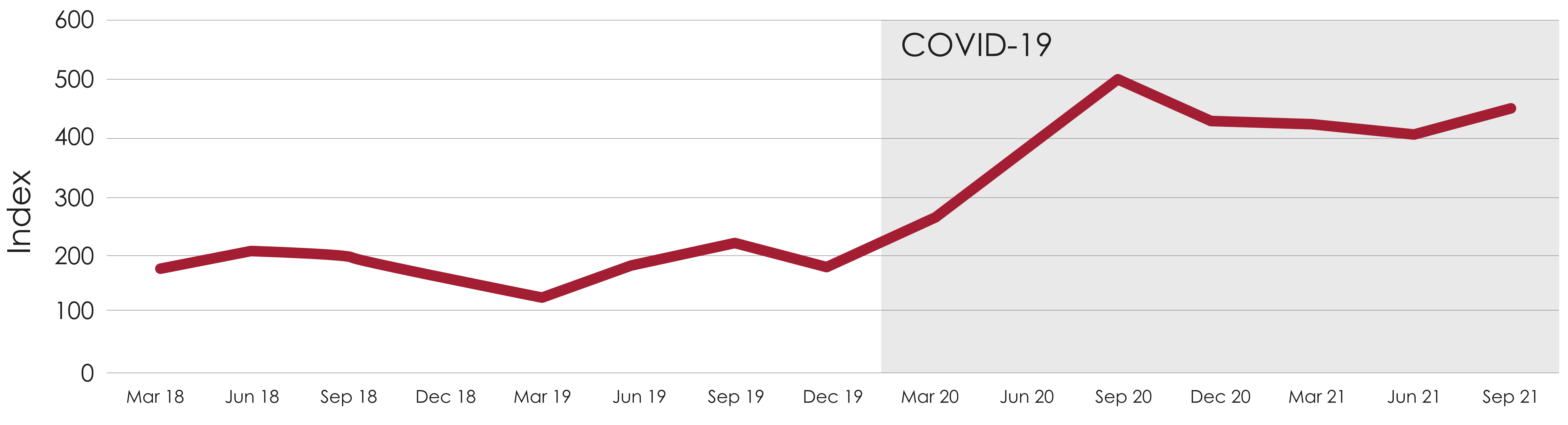
B

**This has been key to driving net migration higher over the latest quarter, the index rising by 14 per cent. Net migration is not far off the peak reached 12 months earlier, down by just 8 per cent.**

A **Regional migration – share of all internal migration**




B **Net migration to regional areas – indexed**




Index = 100, Mar 16

# Regional Hotspots: Top Five LGAs

(by growth in capital to regional migration)

A

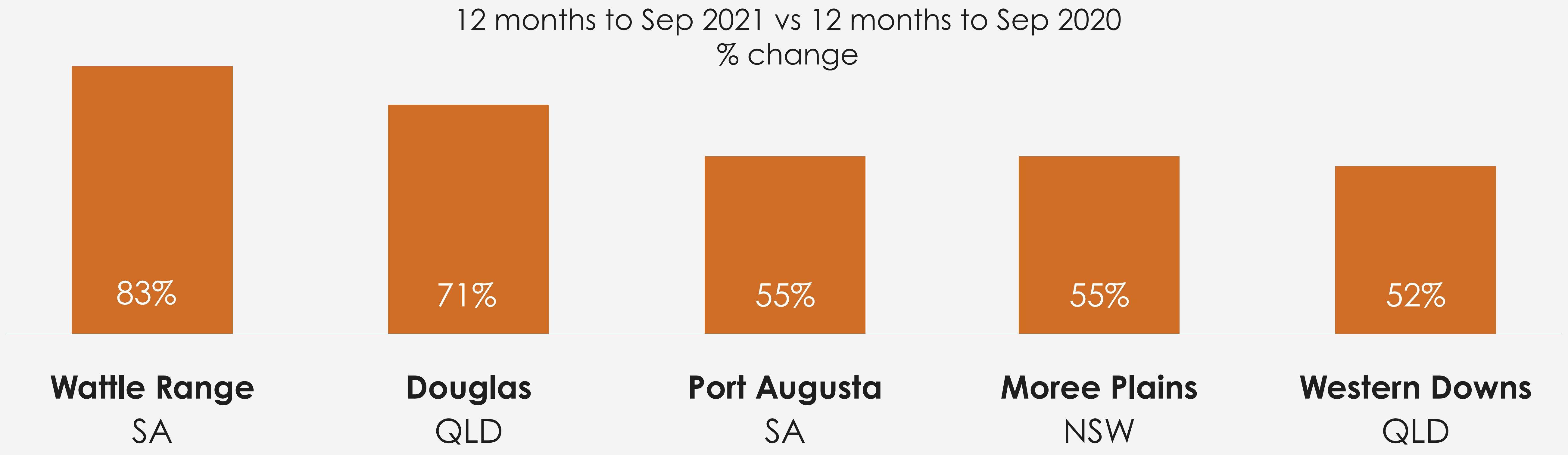
Smaller LGAs – where absolute migration inflows tend to be smaller in number and therefore subject to greater volatility – tend to dominate this list, making the list itself prone to significant changes each update. **Against the backdrop of another Melbourne lockdown, Victorian LGAs are conspicuously absent in this update.**

The South Australian LGA Wattle Range – which neighbours Mt Gambier – saw the strongest growth in migration from capitals among all LGAs during the 12 months to September 2021. Douglas in Queensland experienced the second largest increase. This was followed by Port Augusta in South Australia, Moree Plains in New South Wales and Western Downs in Queensland.

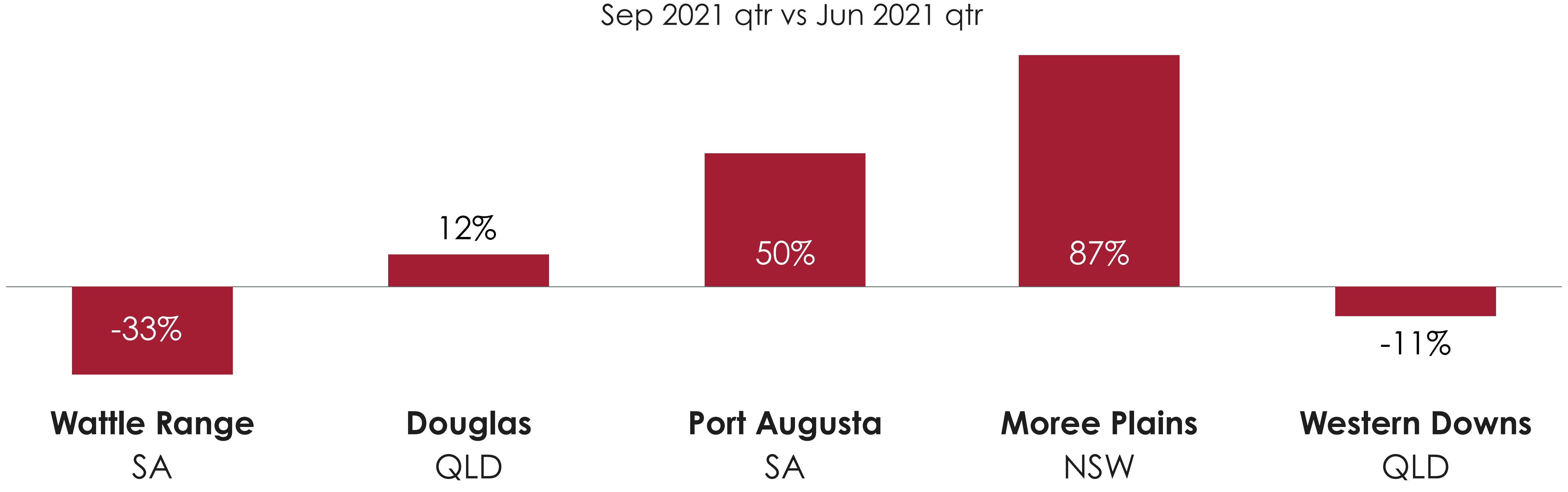
B

Over the September 2021 quarter however, the number capital city people moving into Wattle Range and Western Downs declined (by 33 per cent and 11 per cent, respectively). The Douglas, Port Augusta and Moree Plains LGAs each experienced growth (up by 12 per cent, 50 per cent and 87 per cent, respectively).

**A Top 5 LGAs by annual growth in migration**




**B Quarterly change in migration for Top 5 LGAs – Sep 2021**



# Regional Hotspots: Top Five LGAs

(by share of capital to regional migration)

A

The largest numbers of capital-city dwellers moving to regional Australia continue to head for the high population coastal centres proximate to capital cities.

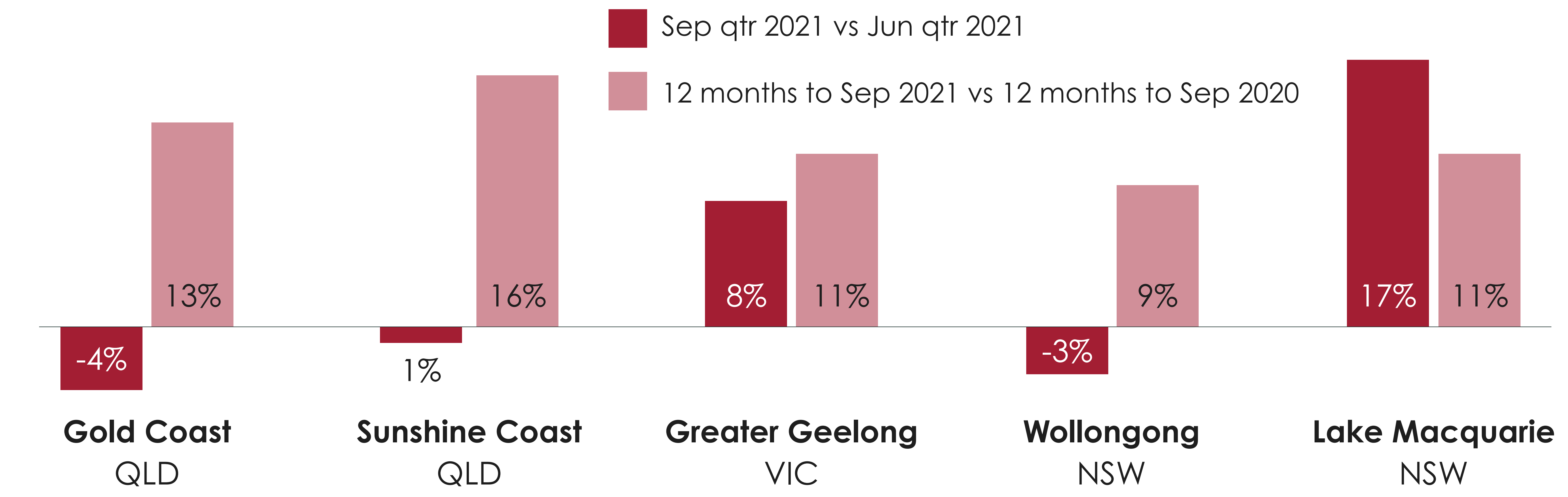
The Gold Coast continues to be the most popular destination. The next most popular destinations were Sunshine Coast, Greater Geelong, Wollongong, and Lake Macquarie.

B

Of these Top 5 LGAs, the Sunshine Coast recorded the strongest annual growth in migration from capital cities (up by 16 per cent) while Lake Macquarie recorded the highest quarterly growth (up by 17 per cent).

## A Top 5 LGAs by share of migration


## B Quarterly and Annual Growth among Top 5 LGAs



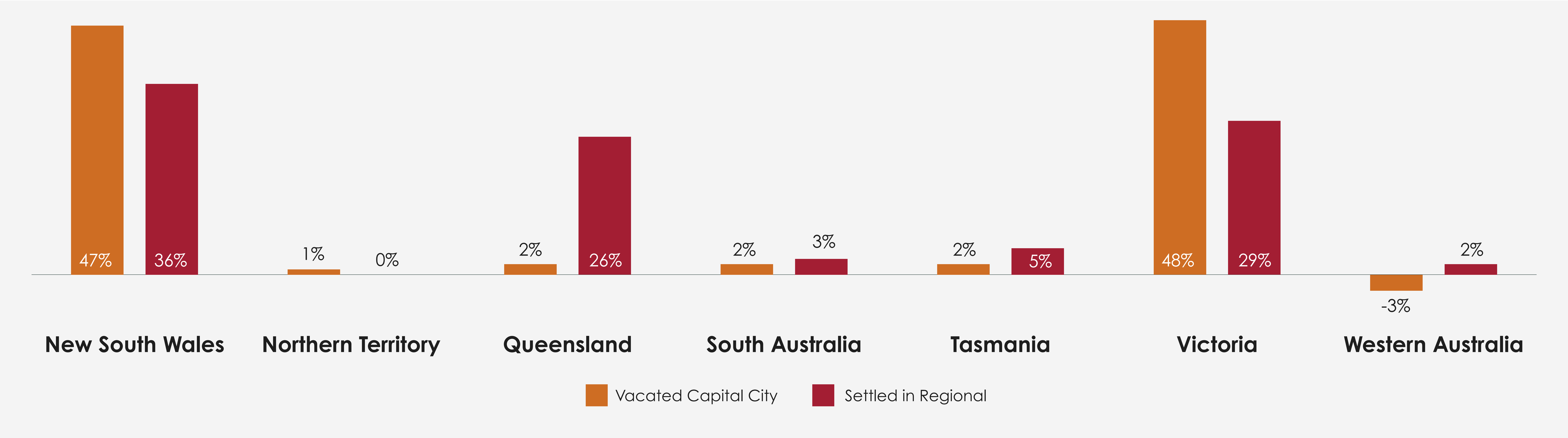
# Migration Patterns By State

## Capital City Net Outflows

### Regional Area Net Inflows, State Shares (12 months to Sep 21)

The Capital City Net Outflows – Regional Area Net Inflows chart shows the breakdown of net migration by state. It shows the shares of net migration out of capital cities and shares of net migration into regional areas.

In the 12 months to September 2021, the bulk of net outflows from all capital cities came from Sydney and Melbourne. Net outflows from these cities accounted for 47 per cent and 48 per cent of all net outflows, respectively (95 per cent of all net outflows combined). Regional Queensland is a key destination – in addition to regional NSW and regional Victoria – for net inflows into regional areas. Regional Queensland picked up 26 per cent of net regional inflows in the 12 months to September 2021.

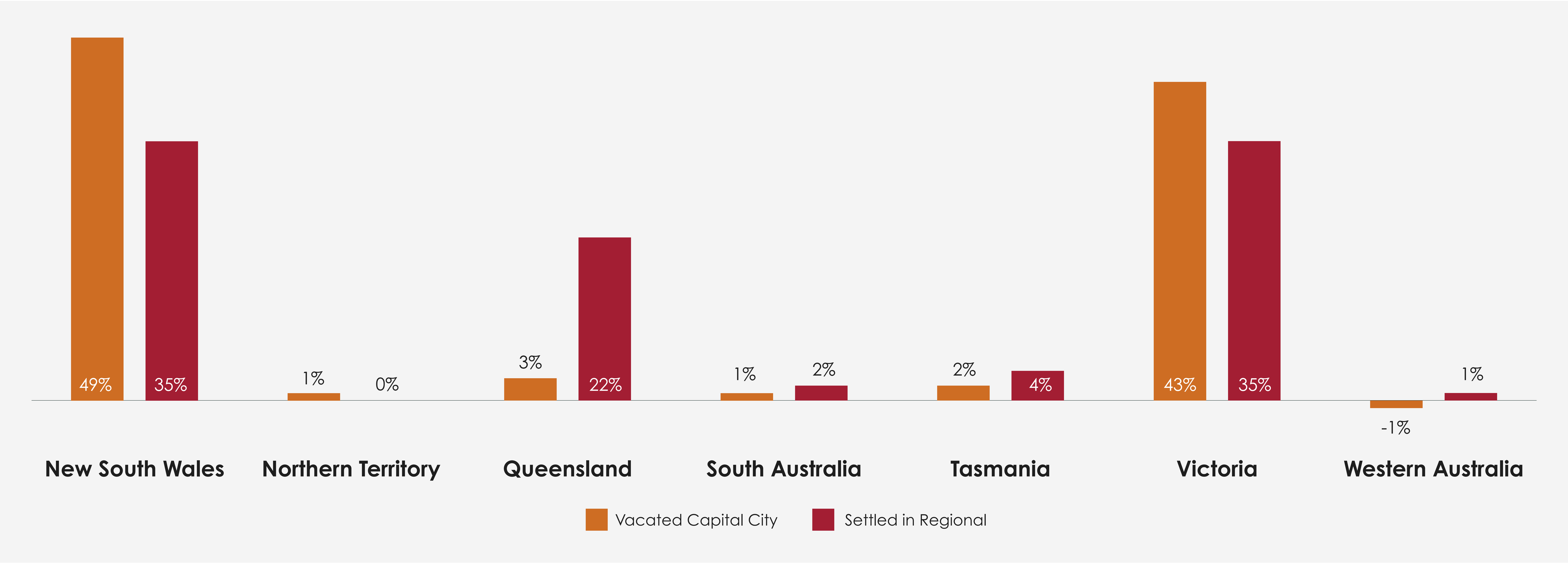


# Migration Patterns By State

## Capital City Net Outflows

**Regional Area Net Inflows, State Shares (12 months to Sep 20)**

That distribution is similar to the previous 12-month period - Sydneysiders accounted for 49 per cent and Melburnians accounted for 43 per cent of net outflows. Regional NSW and Regional Victoria picked up 35 per cent of total net migration into regional Australia, followed by Regional Queensland (22 per cent).



# Appendix

# A1: Regional Movers Index
## Methodology Notes

(1) CBA-RAI Regional Movers Index is defined as movement of CBA personal customers from capital areas to regional areas (see A1.2). Index = 100, March 2016 quarter.

(2) Customer movement or population flows refers to CBA personal customers changing their address as stored in CBA technological systems. Customers must have stayed in address for 6 months (prior to moving) to be counted.

(3) Capital/Regional areas defined through ABS 1270.0.55.001 GCCSA boundaries. Capital areas include GCCSA_NAMES of Greater Sydney, Greater Melbourne, Greater Brisbane, Greater Adelaide, Greater Perth, Greater Hobart, Greater Darwin and Australian Capital Territory. Regional areas include GCCSA_NAMES of Rest of NSW, Rest of Vic, Rest of QLD, Rest of SA, Rest of TAS, Rest of NT. Offshore and 'No usual address' GCCSA_NAMES excluded. ACT has no regional areas.

(4) Net regional migration index is calculated as movement from capital areas to regional less movement from regional areas to capitals. Index = 100, March 2016 quarter.

(5) LGAs defined through ABS 1270.0.55.003 ASGS Volume 3 – Non ABS Structures. LGA must have received at least 100 persons in capital to regional migration in September 2021 quarter to be included. 14 LGAs have a percentage of their constituency defined as Capital and the another percentage defined as Regional. These LGAs include Scenic Rim (R), Light (RegC), Barossa (DC), Yarra Ranges (S), Lockyer Valley (R), Kingborough (M), Murrindindi (S), Derwent Valley (M), Murray (S), Mallala (DC), Moorabool (S), Mitchell (S), Macedon Ranges (S), Unincorporated NT.

(6) Proportion of CBA customers in each state as percentage of total customers is representative of overall Australian population (ABS National, state and territory population released 18th March 2021 for September 2020 reference period).

(7) In Appendix A3 – only those LGAs with at least 100 CBA personal customers moving during the last four quarters.

# A2: Glossary

| Term | Definition |
|---|---|
| **“Index”, “the index”, RMI** | Regional Movers Index which tracks population flows from capital cities to Regional Australia. |
| **Internal migration** | Internal migration constitutes of four movement types – capital cities to regional, regional to capital cities, regional to regional and capital cities to capital cities. |
| **Net migration to regional** | Movement into regional from capital cities minus movement from regional to capital cities. |
| **Annual growth in migration** | For each LGA – change in migration (capital to regional) from 12 months to September 2020 to 12 months to September 2021. |
| **Quarterly growth in migration** | For each LGA – change in migration (capital to regional) from the previous quarter to the current quarter. |
| **Share of regional migration** | For each LGA – percentage share of total migration (capital to regional) in the 12 months to September 2021. |
| **Capital city net outflow** | Movement out of capital cities to regional areas minus movement into capital cities from regional areas. |
| **Regional area net inflow** | Movement into regional areas from capital cities minus movement out of regional areas to capital cities. |

# A3: All LGAs

## Share of Migration, YoY Change, QoQ Change

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Gold Coast | QLD | 11% | -4% | 13% |
| Sunshine Coast | QLD | 5% | 1% | 16% |
| Greater Geelong | VIC | 4% | 8% | 11% |
| Wollongong | NSW | 3% | -3% | 9% |
| Lake Macquarie | NSW | 2% | 17% | 11% |
| Newcastle | NSW | 2% | 22% | 10% |
| Queanbeyan-Palerang Regional | NSW | 2% | 5% | 25% |
| Cairns | QLD | 2% | -1% | 8% |
| Townsville | QLD | 1% | -12% | 3% |
| Ballarat | VIC | 1% | -1% | 16% |
| Shoalhaven | NSW | 1% | 1% | 5% |
| Toowoomba | QLD | 1% | -5% | 10% |
| Launceston | TAS | 1% | -39% | 38% |
| Byron | NSW | 1% | 11% | 19% |
| Wingecarribee | NSW | 1% | 11% | 11% |
| Greater Bendigo | VIC | 1% | -9% | 9% |
| Baw Baw | VIC | 1% | 18% | 5% |
| Fraser Coast | QLD | 1% | 9% | 19% |
| Tweed | NSW | 1% | -4% | 19% |
| Mid-Coast | NSW | 1% | 12% | 17% |
| Bass Coast | VIC | 1% | 23% | 12% |
| Noosa | QLD | 1% | -2% | 29% |
| Port Macquarie-Hastings | NSW | 1% | 8% | 18% |

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Coffs Harbour | NSW | 1% | 1% | 9% |
| Greater Shepparton | VIC | 1% | -3% | 22% |
| Bundaberg | QLD | 1% | -3% | 4% |
| Hindmarsh | VIC | 1% | -13% | -11% |
| Surf Coast | VIC | 1% | 57% | 3% |
| Port Stephens | NSW | 1% | 4% | 0% |
| Mackay | QLD | 1% | -10% | -5% |
| Latrobe | VIC | 1% | -2% | 0% |
| Albury | NSW | 1% | 49% | 14% |
| Dubbo Regional | NSW | 1% | 3% | -8% |
| Mildura | VIC | 1% | 24% | -24% |
| Wagga Wagga | NSW | 1% | 23% | 22% |
| East Gippsland | VIC | 1% | 23% | 13% |
| Maitland | NSW | 1% | 10% | 16% |
| Eurobodalla | NSW | 1% | 8% | 18% |
| Mitchell | VIC | 1% | 25% | -11% |
| Alice Springs | NT | 1% | -18% | 0% |
| Rockhampton | QLD | 1% | -12% | 23% |
| Whitsunday | QLD | 1% | 17% | 8% |
| Cessnock | NSW | 1% | 27% | 18% |
| Shellharbour | NSW | 1% | -4% | 7% |
| Wellington | VIC | 1% | 25% | 6% |
| Orange | NSW | 1% | 4% | 12% |
| Busselton | WA | 1% | 1% | 14% |

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Tamworth Regional | NSW | 0% | 6% | 20% |
| South Gippsland | VIC | 0% | 19% | 3% |
| Ballina | NSW | 0% | 1% | 4% |
| Kalgoorlie/Boulder | WA | 0% | -3% | -3% |
| Gladstone | QLD | 0% | 10% | 2% |
| Bathurst Regional | NSW | 0% | 9% | 8% |
| Wodonga | VIC | 0% | -2% | 7% |
| Clarence Valley | NSW | 0% | 2% | 1% |
| Campaspe | VIC | 0% | -8% | 12% |
| Gympie | QLD | 0% | -15% | 0% |
| Karratha | WA | 0% | -11% | -6% |
| Southern Downs | QLD | 0% | -3% | 17% |
| Moira | VIC | 0% | -23% | 20% |
| Macedon Ranges | VIC | 0% | 33% | 5% |
| Goulburn Mulwaree | NSW | 0% | 6% | 3% |
| Bega Valley | NSW | 0% | 8% | 23% |
| Snowy Monaro Regional | NSW | 0% | 31% | 20% |
| Huon Valley | TAS | 0% | -22% | -3% |
| Devonport | TAS | 0% | -33% | 15% |
| Moorabool | VIC | 0% | 10% | 44% |
| Alexandrina | SA | 0% | -2% | 7% |
| South Burnett | QLD | 0% | 53% | 21% |
| Port Hedland | WA | 0% | 31% | 5% |
| Lismore | NSW | 0% | -7% | -3% |

See Appendix A1 for definitions and methodology.

# A3: All LGAs
## Share of Migration, YoY Change, QoQ Change

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Lockyer Valley | QLD | 0% | -10% | -12% |
| Swan Hill | VIC | 0% | 10% | 3% |
| Griffith | NSW | 0% | 15% | -19% |
| Lithgow | NSW | 0% | -20% | 15% |
| Bunbury | WA | 0% | 0% | 5% |
| Broome | WA | 0% | 17% | 6% |
| Western Downs QLD | QLD | 0% | -11% | 52% |
| Hepburn | VIC | 0% | 12% | -2% |
| Kiama | NSW | 0% | -11% | 13% |
| Yass Valley | NSW | 0% | -2% | -3% |
| Augusta-Margaret River | WA | 0% | -13% | 23% |
| Wangaratta | VIC | 0% | -21% | 23% |
| Greater Geraldton | WA | 0% | -26% | -4% |
| Mount Alexander | VIC | 0% | 25% | 6% |
| Warrnambool | VIC | 0% | -1% | 0% |
| Mid-Western Regional | NSW | 0% | 1% | 15% |
| Albany | WA | 0% | -22% | -2% |
| Murrindindi | VIC | 0% | -17% | 5% |
| Douglas QLD | QLD | 0% | 12% | 71% |
| Katherine | NT | 0% | 18% | 17% |
| Barossa | SA | 0% | -15% | 14% |
| Armidale Regional | NSW | 0% | -1% | 2% |
| Cassowary Coast | QLD | 0% | 8% | 0% |
| Harvey | WA | 0% | -1% | 20% |

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| West Tamar | TAS | 0% | -21% | -1% |
| Alpine | VIC | 0% | 13% | 29% |
| Livingstone | QLD | 0% | -17% | 13% |
| Scenic Rim | QLD | 0% | -4% | 23% |
| Kempsey | NSW | 0% | -5% | -1% |
| Mansfield | VIC | 0% | 39% | 13% |
| Colac-Otway | VIC | 0% | 16% | -8% |
| Snowy Valleys | NSW | 0% | 8% | 27% |
| Benalla | VIC | 0% | 0% | 12% |
| Northam | WA | 0% | -23% | 30% |
| Mount Gambier | SA | 0% | 0% | 32% |
| Central Coast | TAS | 0% | -9% | 28% |
| Central Highlands | QLD | 0% | 27% | -17% |
| Murray Bridge | SA | 0% | -2% | 17% |
| Mareeba | QLD | 0% | 15% | 16% |
| Victor Harbor | SA | 0% | -37% | -2% |
| Glenelg | VIC | 0% | 3% | 15% |
| Meander Valley | TAS | 0% | 15% | 22% |
| Strathbogie | VIC | 0% | 70% | 8% |
| Hilltops | NSW | 0% | 30% | 7% |
| Mount Isa | QLD | 0% | -23% | -7% |
| Burnie | TAS | 0% | -20% | -8% |
| Port Augusta SA | SA | 0% | 50% | 55% |
| Southern Midlands | TAS | 0% | -21% | 3% |

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Golden Plains | VIC | 0% | -2% | -2% |
| Nambucca Valley | NSW | 0% | -11% | -23% |
| Singleton | NSW | 0% | -15% | 12% |
| Murray River | NSW | 0% | -35% | 8% |
| Copper Coast | SA | 0% | 6% | 24% |
| Glamorgan/Spring Bay | TAS | 0% | -32% | 35% |
| Whyalla | SA | 0% | -38% | -1% |
| Ashburton | WA | 0% | -25% | 9% |
| Indigo | VIC | 0% | -25% | 6% |
| Isaac | QLD | 0% | 7% | 4% |
| Horsham | VIC | 0% | 52% | 5% |
| Tablelands | QLD | 0% | 8% | -7% |
| Chittering | WA | 0% | 38% | 31% |
| Federation | NSW | 0% | 0% | 13% |
| Richmond Valley | NSW | 0% | -8% | 6% |
| Wyndham-East Kimberley | WA | 0% | 12% | -3% |
| Northern Grampians | VIC | 0% | 8% | 7% |
| Circular Head | TAS | 0% | 15% | 48% |
| Central Goldfields | VIC | 0% | -8% | -2% |
| Esperance | WA | 0% | 23% | 29% |
| Gingin | WA | 0% | 20% | 25% |
| Corangamite | VIC | 0% | 19% | 23% |
| Renmark Paringa | SA | 0% | -14% | 17% |
| Muswellbrook | NSW | 0% | -36% | 18% |

See Appendix A1 for definitions and methodology.

# A3: All LGAs
## Share of Migration, YoY Change, QoQ Change

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Bellingen | NSW | 0% | -12% | -9% |
| Ararat | VIC | 0% | -14% | 10% |
| Cowra | NSW | 0% | -3% | 17% |
| Burdekin | QLD | 0% | 25% | 1% |
| Capel | WA | 0% | -30% | -1% |
| Manjimup | WA | 0% | 35% | -2% |
| Kingborough | TAS | 0% | -10% | 18% |
| Moree Plains NSW | NSW | 0% | 87% | 55% |
| Moyne | VIC | 0% | -8% | -10% |
| Maranoa | QLD | 0% | -16% | 27% |
| Light | SA | 0% | 3% | 14% |
| Northern Midlands | TAS | 0% | -18% | 19% |
| Queenscliffe | VIC | 0% | 124% | 17% |
| Broken Hill | NSW | 0% | -21% | 8% |
| Upper Hunter Shire | NSW | 0% | 17% | 5% |
| Oberon | NSW | 0% | 9% | 33% |
| Southern Grampians | VIC | 0% | -11% | 2% |
| East Pilbara | WA | 0% | -17% | 1% |
| Berri and Barmera | SA | 0% | -6% | 16% |
| Waratah/Wynyard | TAS | 0% | -34% | 2% |
| Port Lincoln | SA | 0% | -24% | 24% |
| Break O'Day | TAS | 0% | 9% | 26% |
| Cabonne | NSW | 0% | -34% | 29% |
| Derwent Valley | TAS | 0% | 3% | 25% |

| LGA | State | Share of Migration % | QoQ Change % | YoY Change % |
|---|---|---|---|---|
| Mid Murray | SA | 0% | -3% | -3% |
| Yankalilla | SA | 0% | -22% | 13% |
| Berrigan | NSW | 0% | 67% | 11% |
| Parkes | NSW | 0% | 8% | 30% |
| Gannawarra | VIC | 0% | 13% | 41% |
| Cootamundra-Gundagai Regional | NSW | 0% | -11% | 18% |
| Port Pirie City and Dists | SA | 0% | 19% | 8% |
| Latrobe | TAS | 0% | -21% | -3% |
| Yorke Peninsula | SA | 0% | 23% | -9% |
| Carnarvon | WA | 0% | 40% | 6% |
| Unincorporated SA | SA | 0% | 107% | 35% |
| Wattle Range SA | SA | 0% | -33% | 83% |
| Upper Lachlan Shire | NSW | 0% | 48% | 12% |
| Banana | QLD | 0% | 4% | 19% |
| Toodyay | WA | 0% | -13% | 35% |
| Leeton | NSW | 0% | -44% | 16% |
| Dardanup | WA | 0% | -31% | -11% |

See Appendix A1 for definitions and methodology.