

Regional Movers Index

December 2021 Quarter Report

Powered by:



Commonwealth
Bank



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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.

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- The **Index** is powered by CBA data from relocations amongst its 10 million customers.
 - Quarterly and annual changes are presented in the Index.
 - This **Index** is 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.

RAI-CBA Regional Movers Index



Two years into the pandemic, migration to regional areas remains elevated

1

The two years of the pandemic have seen quarterly migration from capital cities to regional areas average a level that is 15 per cent higher than what prevailed in the two years pre-pandemic. The elevated level of pandemic migration continued through to the end of 2021, despite a fall in the latest quarter.

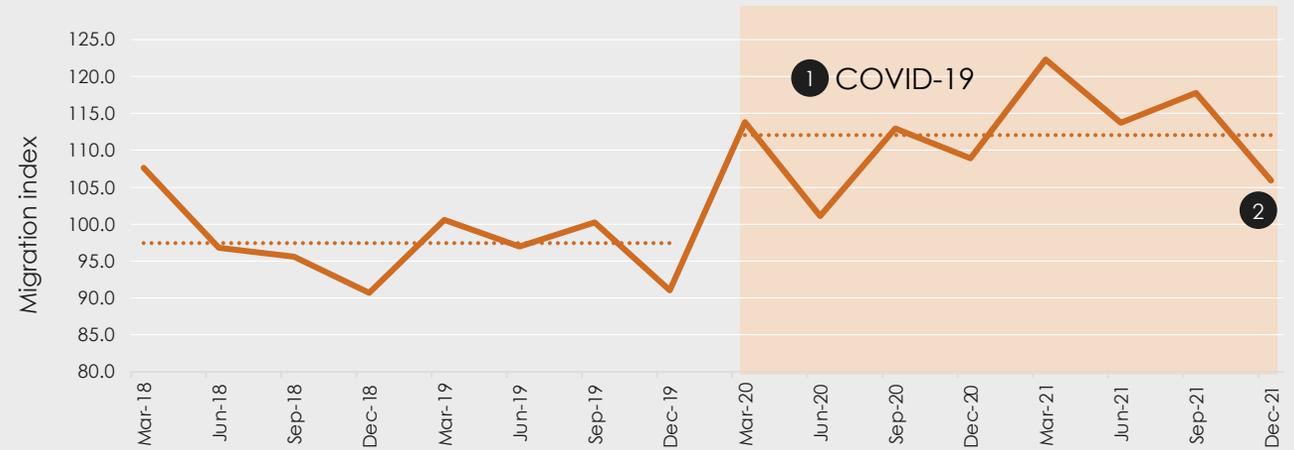
2

The number of people moving from the capitals to regional areas fell by 10 per cent during the December 2021 quarter. This fall is largely seasonal - the RMI typically posts a decline in the December quarter of any given year - but it has also occurred amid tight housing conditions across regional Australia. Regional housing price growth accelerated in 2021 following more modest rises in 2020. The fall also comes amid tight housing conditions across regional Australia – regional housing price growth accelerated in 2021 following more modest rises in 2020.

3

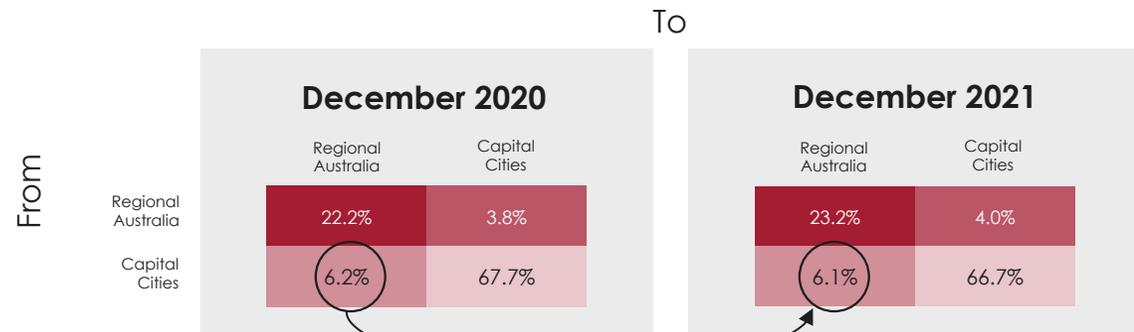
Of all relocations during the December 2021 quarter, those moving from capital cities to regional areas accounted for a slightly smaller share than a year earlier. This group accounted for 6.1 per cent of all movers in the December 2021 quarter, down by just 0.1 percentage points from the share they accounted for a year earlier.

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



Index = 100, March 2016

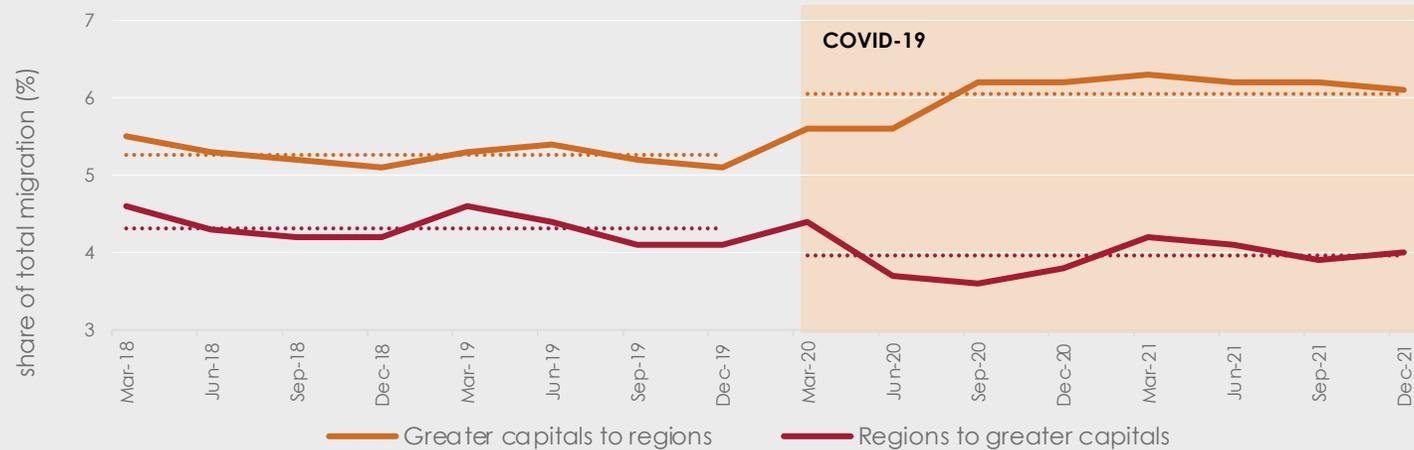
3 Breakdown of total internal migration



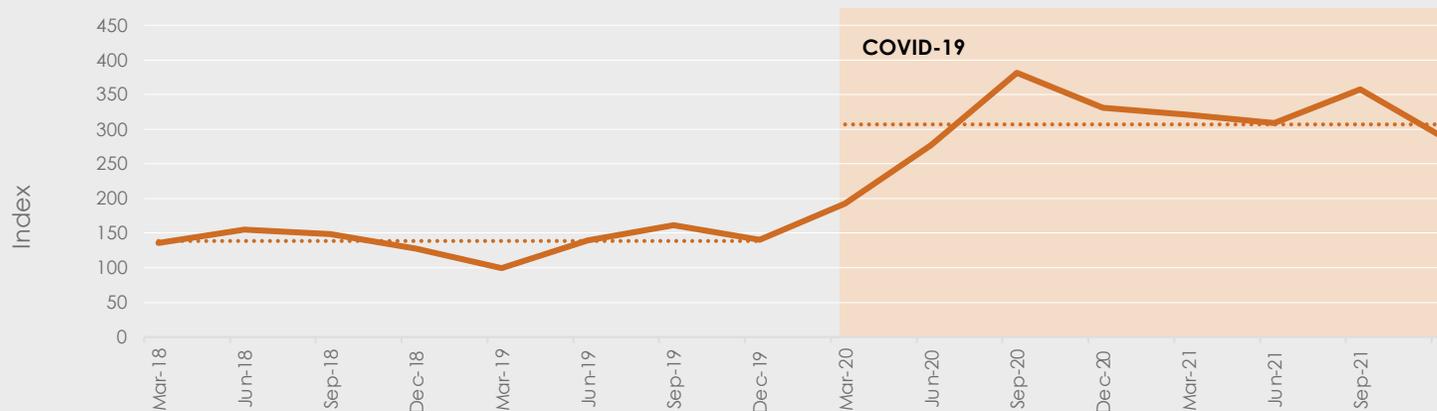
Net Internal Migration To Regional Australia



1 Regional migration - share of all internal migration



2 Net Migration to regional areas - indexed



Net migration to regional Australia during the pandemic has more than doubled pre-pandemic levels

1

A structural break in migration patterns has emerged during the two years of the pandemic. Capital city dwellers moving to the regions have generally accounted for a 6.1 per cent share, up from the 5.3 per cent share pre-pandemic. Meanwhile the share of regional people making a city move has ebbed and flowed a little more, but has hovered around a 4 per cent share during the pandemic, down from the 4.3 per cent share pre-pandemic.

2

Accordingly, net migration to regional areas has remained elevated during the pandemic, more than double the levels prevailing in the two years prior to the pandemic.

Regional Hotspots: Top Five LGAs – by growth in capital-to-regional migration, 2021 vs 2020



Top Five growing areas of regional migration

1

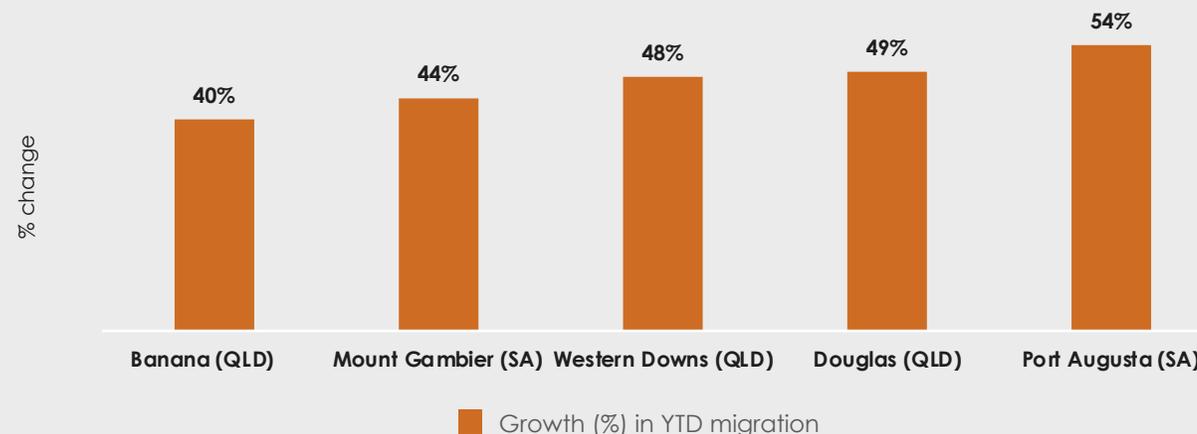
The local government areas that experienced the strongest annual growth in migration from capital cities in the full 2021 calendar year were all in Queensland and South Australia. Port Augusta in SA topped the list, closely followed by Douglas and Western Downs in Queensland, Mount Gambier in SA and Banana in Queensland.

2

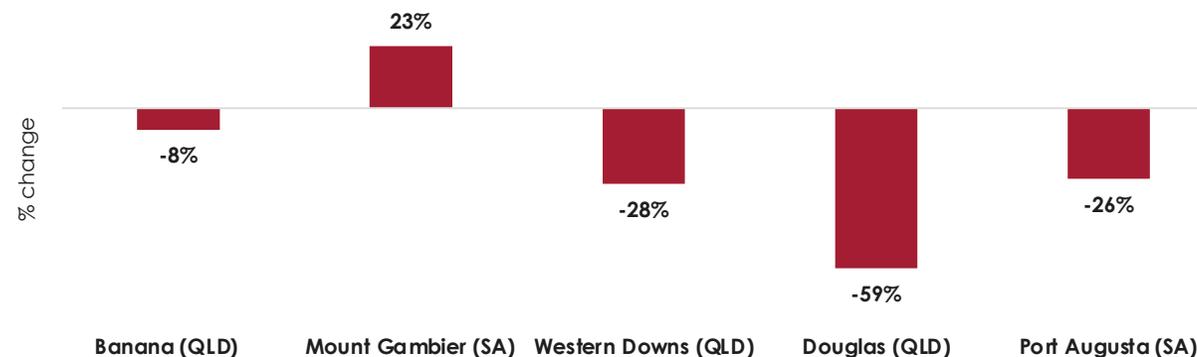
These Top Five LGAs (bar Mount Gambier) were not immune from the headline quarterly decline in capital-regional migration. That is, in the December 2021 quarter, each of these LGAs welcomed in fewer capital-city dwellers than in the September 2021 quarter. Mount Gambier bucked this trend. The number of capital-city dwellers moving to this South Australian setting increased significantly during the December 2021 quarter, up by 23 per cent on the inflow during the previous quarter.

In contrast, the number of capital-city dwellers moving to Douglas Shire in Queensland fell sharply in the December 2021 quarter, by nearly 60 per cent. This follows successive quarters of growth (driving the full calendar year result).

1 Top Five LGAs by growth in migration 12 months to Dec 2021 vs 12 months to Dec 2020



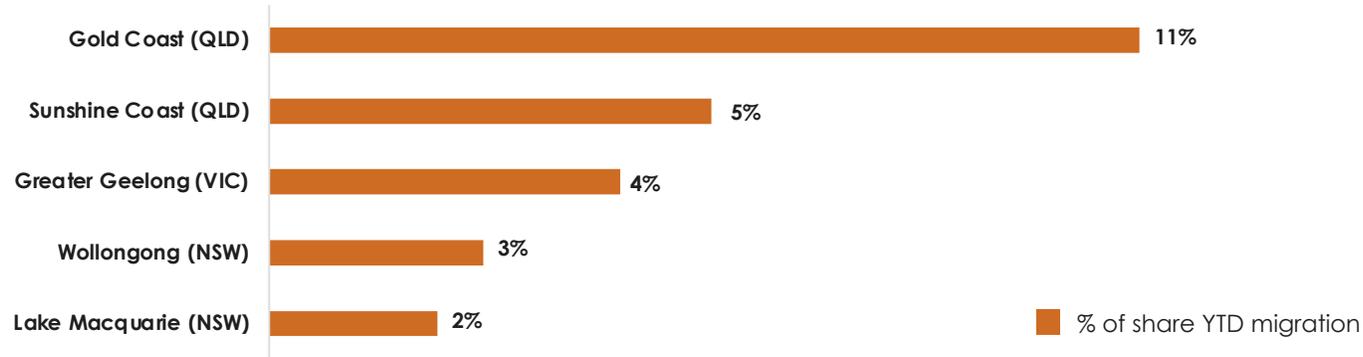
2 Quarterly change in migration for Top Five LGAs – Dec 2021 Dec 2021 qtr vs Sep 2021 qtr



Regional Hotspots: Top Five LGAs – by share of capital to regional migration



1 Top Five LGAs by share of regional migration – 12 months to Dec 2021



2 Quarterly and Annual Growth among Top Five LGAs



Migration to regional areas: Top Five LGAs

1

The high-population coastal centres close to capital cities continue to be the main destinations for capital-city dwellers making a regional move.

The Gold Coast continues to be the most popular destination, welcoming 11 per cent of all capital-city dwellers who moved to regional areas during 2021. The next most popular destinations were the familiar LGAs of Sunshine Coast, Greater Geelong, Wollongong and Lake Macquarie.

2

In line with the national trend, capital-city migration to each of these Top Five LGAs fell during the December 2021 quarter. Previous strong growth in migration is clearly easing in Geelong and Wollongong. Migration in the full 2021 calendar year to these LGAs was less than in 2020. Yet for the Gold Coast, Sunshine Coast and Lake Macquarie, migration in 2021 was higher, up by 4 per cent, 7 per cent and 4 per cent, respectively, on the level in 2020.

Migration Patterns By State



The capital-city net outflows – regional-area net inflows charts show the breakdown of net migration by state. They show the state by state shares of net migration **out of capital cities** and state by state shares of **net migration into regional areas**.

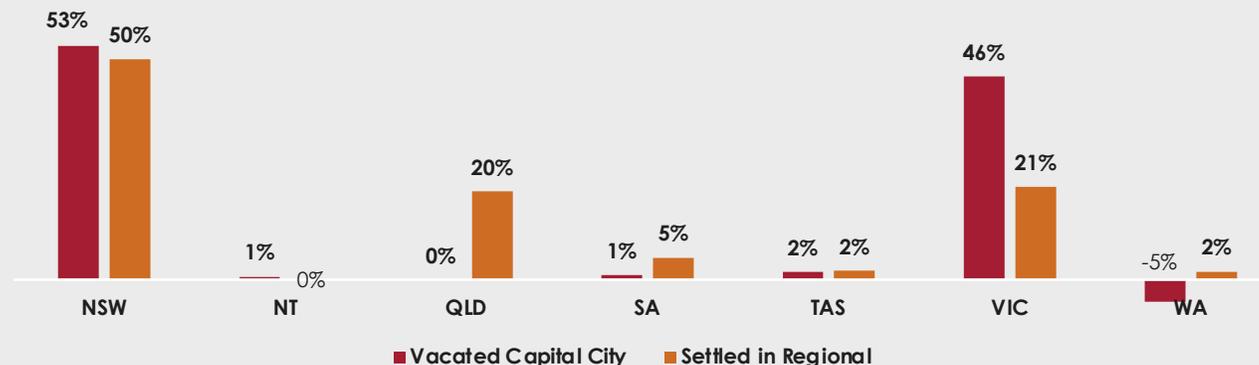
1

In 2021, the second year of the pandemic, the bulk of net outflows from all capital cities came from Sydney and Melbourne (53 per cent and 46 per cent, respectively, comprising 99 per cent of all net outflows). The net inflows to regional Australia were not so evenly distributed across the three main states. Regional NSW picked up half of the net inflows to regional Australia, while regional Victoria and Queensland each had a share of around 20 per cent.

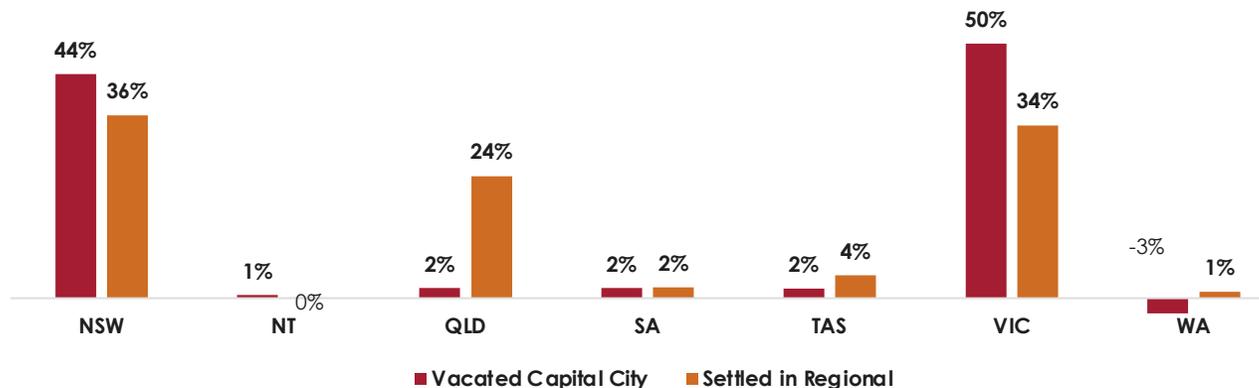
2

The 2021 distribution contrasts with the distribution in 2020, where Melburnians accounted for the largest share of net outflows from capital cities, at 50 per cent. Moreover, in 2020 regional Victoria picked up a larger share – just over one third – of the net inflows into regional Australia that year. Overall, the net inflows to regional Australia were a little more evenly distributed among the three main states in 2020 - regional NSW picked up 36 per cent of total net migration into regional Australia, while regional Queensland picked up 24 per cent.

1 Capital City Net Outflows – Regional Area Net Inflows, State Shares (Year to Dec 21qtr)



2 Capital City Net Outflows – Regional Area Net Inflows, State Shares (Year to Dec 20 qtr)



Appendix



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A1: Regional Movers Index

Methodology Notes



1. CBA-RAI Regional Movers Index is defined as movement of CBA personal customers from capital cities 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 at one address for 6 months (prior to moving) to be counted.
3. Capital cities/Regional areas defined through ABS 1270.0.55.001 GCCSA boundaries. Capital cities go by the GCCSA_NAMES of: Greater Sydney, Greater Melbourne, Greater Brisbane, Greater Adelaide, Greater Perth, Greater Hobart, Greater Darwin and Australian Capital Territory. Regional areas go by the 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. The Net regional migration index is calculated as movement from capital cities to regional less movement from regional areas to capital cities. Index = 100, March 2016 quarter.
5. LGAs are defined through ABS 1270.0.55.003 ASGS Volume 3 – Non ABS Structures. An LGA must have received at least 100 persons in capital to regional migration during the quarter to be included. 14 LGAs have a percentage of their constituency defined as Capital and the other 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. The 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 year.

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 2019/20 financial year to 2020/21 financial year.
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 2020/21 financial year.
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, Changes in Migration



LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Gold Coast	QLD	11%	-33%	-28%	4%
Sunshine Coast	QLD	5%	-31%	-25%	7%
Greater Geelong	VIC	4%	-38%	-29%	-1%
Wollongong	NSW	3%	-31%	-34%	-8%
Lake Macquarie	NSW	2%	-33%	-22%	4%
Newcastle	NSW	2%	-32%	-20%	0%
Queanbeyan-Palerang Regional	NSW	2%	-11%	12%	20%
Cairns	QLD	2%	-34%	-32%	1%
Townsville	QLD	1%	-20%	-24%	-2%
Shoalhaven	NSW	1%	-22%	-21%	-3%
Toowoomba	QLD	1%	-16%	-11%	5%
Ballarat	VIC	1%	-36%	-33%	3%
Wingecarribee	NSW	1%	-37%	-13%	7%
Fraser Coast	QLD	1%	-24%	0%	23%
Launceston	TAS	1%	-43%	-41%	26%
Baw Baw	VIC	1%	-47%	-28%	-3%
Greater Bendigo	VIC	1%	-36%	-27%	2%
Tweed	NSW	1%	-16%	-11%	10%
Bass Coast	VIC	1%	-49%	-25%	1%
Byron	NSW	1%	-31%	-36%	-4%
Mid-Coast	NSW	1%	-33%	-31%	3%
Noosa	QLD	1%	-23%	-14%	22%
Port Macquarie-Hastings	NSW	1%	-23%	-8%	17%
Bundaberg	QLD	1%	-27%	-20%	5%
Coffs Harbour	NSW	1%	-34%	-38%	-5%
Hindmarsh	VIC	1%	-38%	-36%	-16%
Greater Shepparton	VIC	1%	-45%	-44%	2%
Port Stephens	NSW	1%	-28%	-23%	-7%

LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Albury	NSW	1%	-27%	25%	13%
Surf Coast	VIC	1%	-55%	-52%	-23%
Wagga Wagga	NSW	1%	1%	31%	21%
Mackay	QLD	1%	-34%	-37%	-11%
Latrobe	VIC	1%	-31%	-31%	-8%
Dubbo Regional	NSW	1%	-1%	-4%	-14%
East Gippsland	VIC	1%	-35%	-19%	1%
Maitland	NSW	1%	-32%	-18%	7%
Eurobodalla	NSW	1%	-38%	-37%	1%
Mitchell	VIC	1%	-56%	-51%	-20%
Mildura	VIC	1%	-42%	-52%	-32%
Shellharbour	NSW	1%	-20%	-14%	-3%
Cessnock	NSW	1%	-40%	-17%	7%
Tamworth Regional	NSW	1%	-25%	15%	27%
Busselton	WA	1%	-33%	-23%	11%
Wellington	VIC	1%	-42%	-30%	-3%
Orange	NSW	1%	-13%	-8%	0%
Alice Springs	NT	1%	-22%	-25%	-2%
Rockhampton	QLD	1%	-47%	-41%	7%
Whitsunday	QLD	1%	-56%	-45%	4%
Bathurst Regional	NSW	1%	-20%	8%	11%
Ballina	NSW	0%	-31%	-25%	-4%
Kalgoorlie/Boulder	WA	0%	-34%	-2%	6%
South Gippsland	VIC	0%	-46%	-41%	-10%
Gladstone	QLD	0%	-21%	-25%	-4%

A3: All LGAs

Share of Migration, Changes in Migration



LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Gympie	QLD	0%	-27%	-20%	0%
Wodonga	VIC	0%	-40%	-30%	-6%
Karratha	WA	0%	-25%	-19%	-6%
Campaspe	VIC	0%	-46%	-36%	6%
Southern Downs	QLD	0%	-20%	-10%	15%
Moorabool	VIC	0%	-6%	-6%	16%
Clarence Valley	NSW	0%	-34%	-34%	-35%
Goulburn Mulwaree	NSW	0%	-9%	-9%	1%
Snowy Monaro Regional	NSW	0%	-23%	-23%	-3%
Moira	VIC	0%	-20%	-20%	-25%
Macedon Ranges	VIC	0%	-45%	-45%	-35%
Bega Valley	NSW	0%	-14%	-14%	-16%
Alexandrina	SA	0%	-31%	-31%	-17%
Huon Valley	TAS	0%	-22%	-22%	-20%
Port Hedland	WA	0%	-54%	-54%	-30%
Lismore	NSW	0%	-7%	-7%	-16%
Broome	WA	0%	-11%	-11%	24%
South Burnett	QLD	0%	-44%	-44%	-31%
Lithgow	NSW	0%	-17%	-17%	-8%
Devonport	TAS	0%	-37%	-37%	-29%
Griffith	NSW	0%	-16%	9%	-11%
Western Downs	QLD	0%	-28%	10%	48%
Bunbury	WA	0%	-11%	6%	14%
Lockyer Valley	QLD	0%	-19%	-27%	-12%
Yass Valley	NSW	0%	-23%	-20%	-6%
Augusta-Margaret River	WA	0%	-15%	-15%	18%

LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Mid-Western Regional	NSW	0%	-19%	-3%	9%
Kiama	NSW	0%	-34%	-34%	-4%
Greater Geraldton	WA	0%	-14%	0%	-1%
Albany	WA	0%	-17%	-9%	4%
Mount Alexander	VIC	0%	-44%	-33%	-1%
Hepburn	VIC	0%	-49%	-43%	-17%
Murrindindi	VIC	0%	-63%	-37%	3%
Wangaratta	VIC	0%	-37%	-41%	2%
Armidale Regional	NSW	0%	-5%	19%	18%
Warrnambool	VIC	0%	-47%	-49%	-15%
Barossa	SA	0%	-7%	-32%	-11%
Swan Hill	VIC	0%	-50%	-71%	-35%
Douglas	QLD	0%	-59%	-41%	49%
Scenic Rim	QLD	0%	-18%	-4%	17%
West Tamar	TAS	0%	-25%	-33%	-3%
Mount Gambier	SA	0%	23%	68%	44%
Harvey	WA	0%	-34%	-41%	4%
Katherine	NT	0%	-24%	-40%	-8%
Livingstone	QLD	0%	-25%	-40%	-10%
Alpine	VIC	0%	-36%	-38%	-3%
Snowy Valleys	NSW	0%	-36%	-9%	19%
Mansfield	VIC	0%	-68%	-58%	-14%
Kempsey	NSW	0%	-30%	-49%	-23%

A3: All LGAs

Share of Migration, Changes in Migration



LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Cassowary Coast	QLD	0%	-49%	-64%	-22%
Colac-Otway	VIC	0%	-41%	-44%	-24%
Victor Harbor	SA	0%	8%	-18%	-9%
Strathbogie	VIC	0%	-52%	-15%	1%
Glenelg	VIC	0%	-51%	-27%	15%
Murray Bridge	SA	0%	-33%	-33%	16%
Northam	WA	0%	-37%	-42%	6%
Benalla	VIC	0%	-30%	-41%	-8%
Hilltops	NSW	0%	-36%	-17%	3%
Port Augusta	SA	0%	-26%	31%	54%
Mount Isa	QLD	0%	-34%	-13%	-2%
Southern Midlands	TAS	0%	-30%	0%	9%
Mareeba	QLD	0%	-47%	-40%	13%
Central Highlands	QLD	0%	-60%	-55%	-23%
Burnie	TAS	0%	0%	3%	-9%
Nambucca Valley	NSW	0%	24%	-12%	-25%
Central Coast	TAS	0%	-53%	-54%	7%
Singleton	NSW	0%	-21%	-14%	10%
Copper Coast	SA	0%	-31%	0%	28%
Golden Plains	VIC	0%	-17%	-32%	-17%
Meander Valley	TAS	0%	-35%	-61%	-15%
Murray River	NSW	0%	3%	-25%	-8%
Whyalla	SA	0%	0%	10%	-4%
Federation	NSW	0%	-44%	-12%	14%
Central Goldfields	VIC	0%	-14%	-6%	1%
Ashburton	WA	0%	-22%	-24%	6%

LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Chittering	WA	0%	-24%	-11%	18%
Horsham	VIC	0%	-13%	-3%	1%
Indigo	VIC	0%	-42%	-33%	-2%
Isaac	QLD	0%	-45%	-28%	-2%
Capel	WA	0%	-11%	48%	19%
Tablelands	QLD	0%	-36%	-24%	-2%
Glamorgan/Spring Bay	TAS	0%	-23%	-27%	20%
Richmond Valley	NSW	0%	0%	-29%	-11%
Gingin	WA	0%	-36%	-19%	12%
Northern Grampians	VIC	0%	-58%	-35%	5%
Bellingen	NSW	0%	-24%	-3%	-10%
Muswellbrook	NSW	0%	-13%	0%	19%
Light	SA	0%	-25%	41%	39%
Wyndham-East Kimberley	WA	0%	-20%	-35%	-11%
Renmark Paringa	SA	0%	-25%	-20%	14%
Ararat	VIC	0%	-29%	-13%	6%
Esperance	WA	0%	-41%	-36%	6%
Corangamite	VIC	0%	-55%	-54%	-1%
Berri and Barmera	SA	0%	-4%	37%	30%
Port Lincoln	SA	0%	0%	33%	26%
Cowra	NSW	0%	-21%	-15%	3%
Broken Hill	NSW	0%	21%	4%	1%
Moree Plains	NSW	0%	-46%	-9%	32%

A3: All LGAs

Share of Migration, Changes in Migration



LGA	State	Share of migration	Dec qtr 2021 vs Sept qtr 2021	Dec qtr 2021 vs Dec qtr 2020	2021 vs 2020
Port Pirie City and Dists	SA	0%	10%	88%	29%
Upper Hunter Shire	NSW	0%	-37%	-27%	1%
Yankalilla	SA	0%	-12%	-4%	11%
Yorke Peninsula	SA	0%	-3%	48%	7%
Circular Head	TAS	0%	-56%	-67%	0%
Derwent Valley	TAS	0%	-61%	-33%	24%
Oberon	NSW	0%	-61%	-52%	0%
Parkes	NSW	0%	8%	17%	20%
Queenscliffe	VIC	0%	-75%	-57%	-11%
Kingborough	TAS	0%	-64%	-67%	-7%
Northern Midlands	TAS	0%	-44%	-46%	5%
Waratah/Wynyard	TAS	0%	-35%	-41%	-14%
Banana	QLD	0%	-8%	35%	40%
East Pilbara	WA	0%	-17%	-21%	-12%
Maranoa	QLD	0%	-13%	-41%	-6%
Southern Grampians	Victoria	0%	-46%	-44%	-7%
Dardanup	WA	0%	48%	55%	4%
Manjimup	WA	0%	-33%	-47%	-19%
Break O'Day	TAS	0%	-63%	-50%	5%
Upper Lachlan Shire	NSW	0%	-24%	25%	13%
Berrigan	NSW	0%	-43%	-25%	-14%
Latrobe	TAS	0%	-29%	-6%	-2%