

Regional Movers Index

Dec 2025 Quarter Report

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What is the Regional Movers Index?



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

The **Index** is a partnership between Commonwealth Bank of Australia (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.

Released quarterly, the RMI was established at the height of the COVID-19 pandemic to track the movement of capital city people to the regions. The RMI publication also highlighted that regional people were tending to stay in regions to avoid those severe capital-city lockdowns. Housing and cost of living pressures are continuing to influence the patterns of movement within Australia, and the RMI publication has been refined to focus on the net migration flows to give current information on the extent to which regional populations are either growing or shrinking. See p18-20 in the appendix for details on the methodology that focuses on these net flows.

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- The **Index** is powered by CBA data from relocations amongst more than 14.6 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's movements it enables early identification of growth trends, and flags places emerging as hotspots needing fresh thinking on housing and infrastructure.

Regional Movers Index

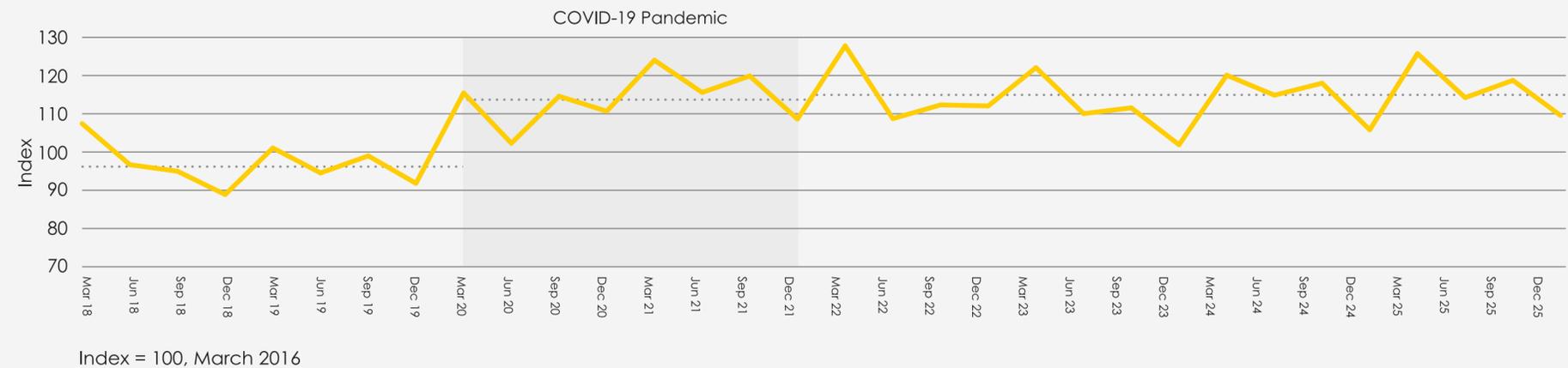


Capital city dwellers continue to search for jobs, housing, and lifestyle in the regions

Like most previous December quarters, the Regional Movers Index (RMI) experienced a dip. This quarter it dropped 7.7 per cent. However, when considering seasonality, the drop is smaller than the previous two December quarters (with December typically the weakest quarter for the RMI).

Throughout the December 2025 quarter, the number of capital city residents moving to Australia's regions outnumbered those making a move in the opposite direction by 31 per cent. Migration from capitals accounted for 11.6 per cent of all internal migration - the second highest level recorded since 2022, underscoring the strength of the total number of movers between capitals and regions.

Regional Movers Index: Population flows from capital cities to regional Australia



Breakdown of total major relocations December Quarter 2025

		To	
		Regional Australia	Capital Cities
From	Regional Australia	12.4%	8.8%
	Capital Cities	11.6%	67.2%

Net Internal Migration to Regional Australia



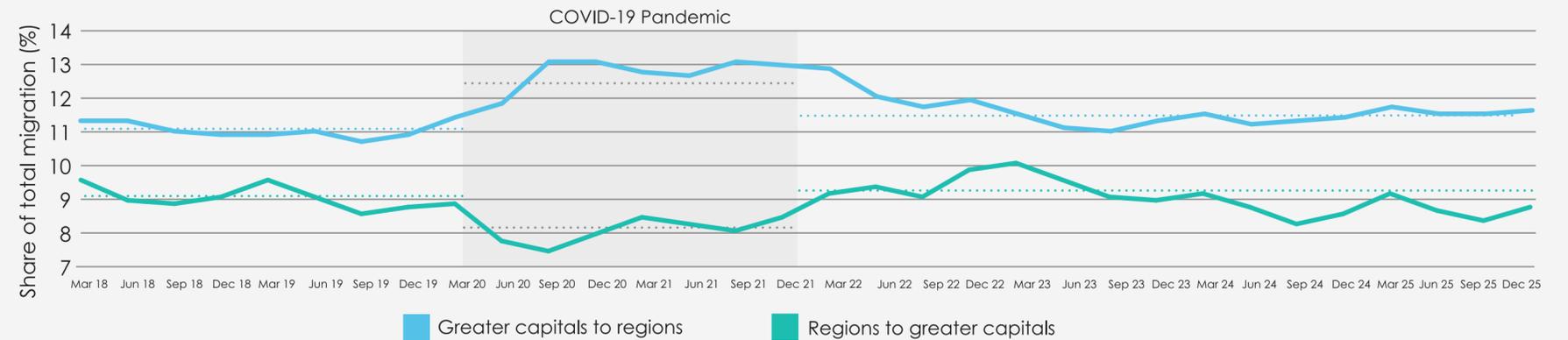
The regions continue to appeal to city dwellers

In the December 2025 quarter, capital city residents moving to Australia's regions outnumbered regional residents making a move in the opposite direction by 31 per cent, maintaining a positive gap in favour of regional population migration.

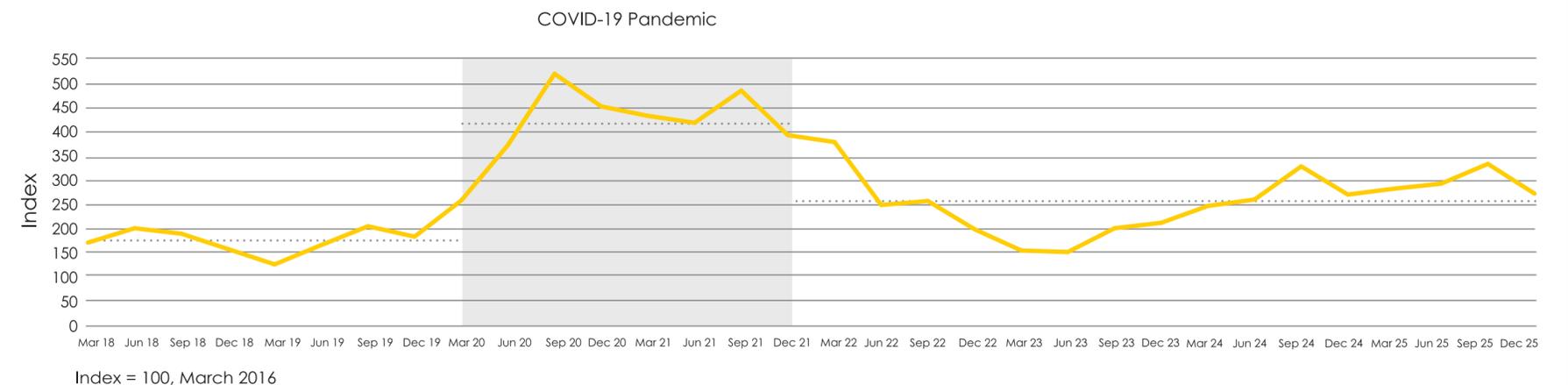
Migration from regions into the capitals accounted for an 8.8 per cent share of all internal migration, which is below the post-COVID average, although up slightly from last quarter. As a result, net movement (outgoing minus incoming) between capitals and regions declined as a share of total migration.

The net migration index (net flow from capital to regions) remained above its post-COVID average and well above its pre-COVID average.

Regional migration – share of all internal migration



Net migration to regional areas – indexed



Migration Patterns By State



Migration from southern capitals is increasingly heading north and west

The charts opposite show the breakdown of net migration on a state-by-state basis. The yellow column shows the state's national share of net migration out of capital cities to regions. The orange column shows the state's national share of net migration into regional areas from capital cities.

Sydney and Melbourne, continue to be the major sources of net outflows to Australia's regions. In the December 2025 quarter, Sydneysiders accounted for 54 per cent of net outflows across all capital cities, with Melburnians accounting for 38 per cent, a combined total of 92 per cent.

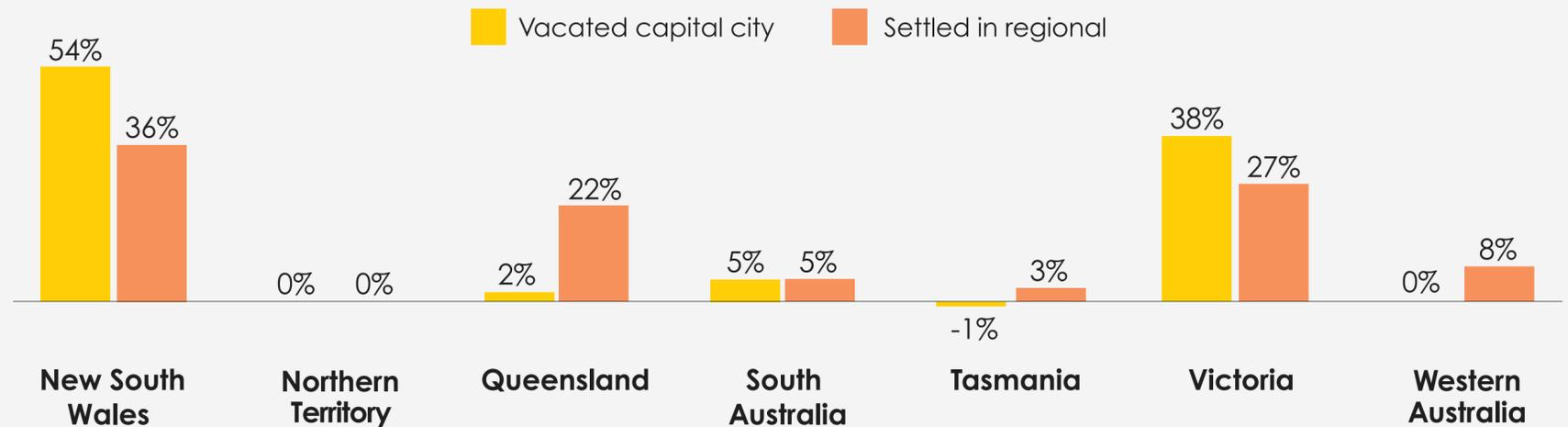
While the net outflows from the other state capitals remain much smaller, their share is growing. There are notable changes in December 2025 compared with a year earlier:

Brisbane shifted from being a receiver of net flows to a contributor – that is, more people are now leaving Brisbane for the regions than the reverse. Perth shifted from being a receiver of net flows to experiencing a balanced net flow of migration.

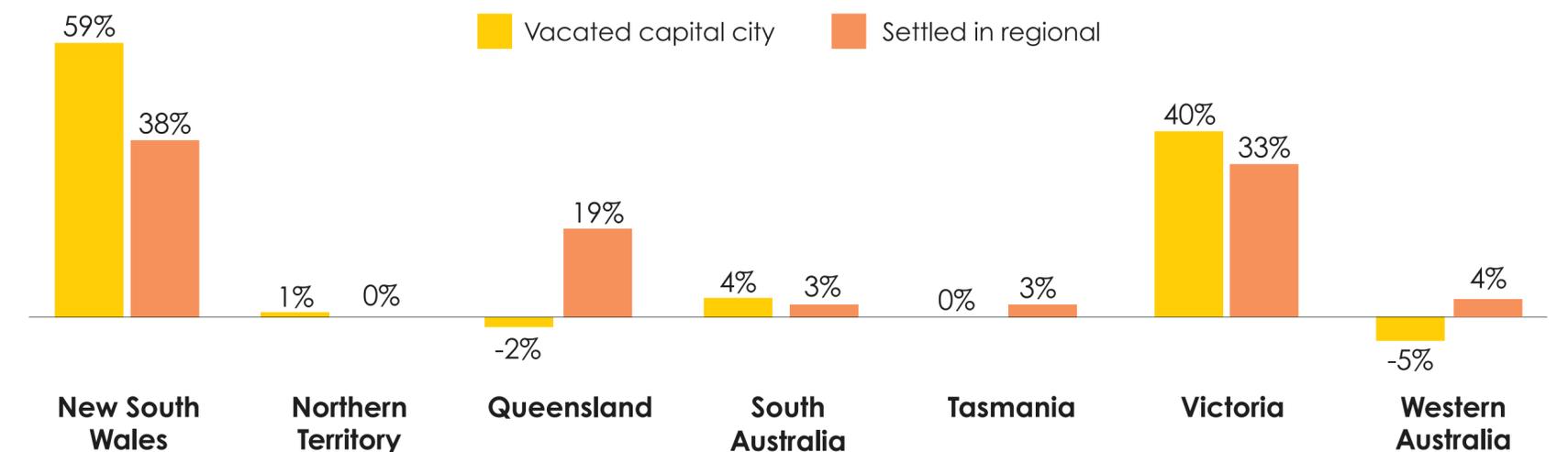
Regional areas in Western Australia, South Australia and Queensland recorded increases in net inflows from a year earlier.

Victorian regions experienced the largest relative decline, falling from receiving 33 per cent of net inflow to 27 per cent of net inflow.

Capital city net outflows – regional area net inflows, state shares, December Quarter 2025



Capital city net outflows – regional area net inflows, state shares, December Quarter 2024



Regional Hotspots by Share



Top Five LGAs: the largest net internal migration inflows

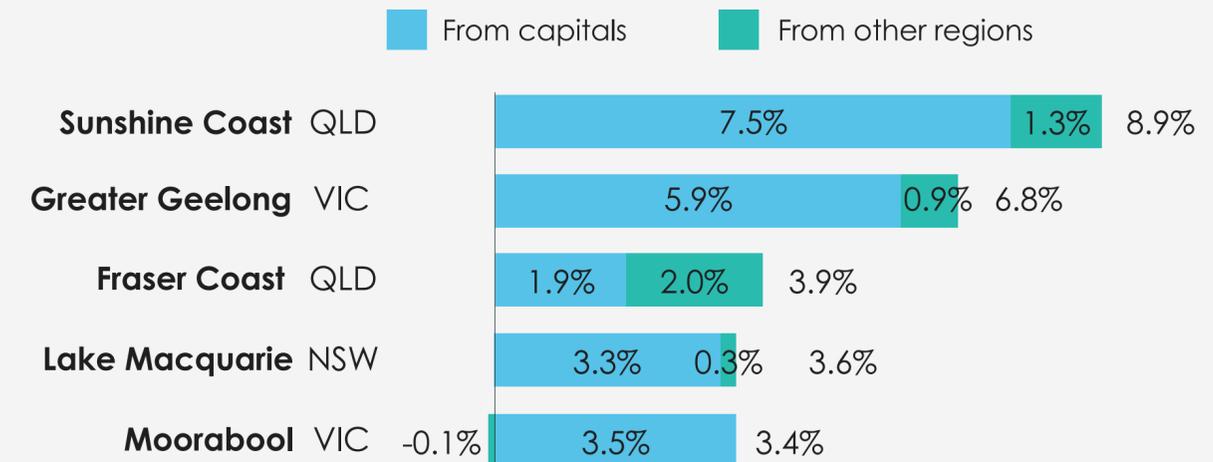
The top five LGAs in terms of largest net internal migration inflow remain largely unchanged from the previous September 2025 quarter. Notably, the Fraser Coast continued to climb higher, taking third place and bumping Lake Macquarie into fourth.

The Sunshine Coast accounted for 8.9 per cent of total net migration, followed by Greater Geelong with 6.8 per cent and the Fraser Coast with 3.9 per cent - though increasing rapidly.

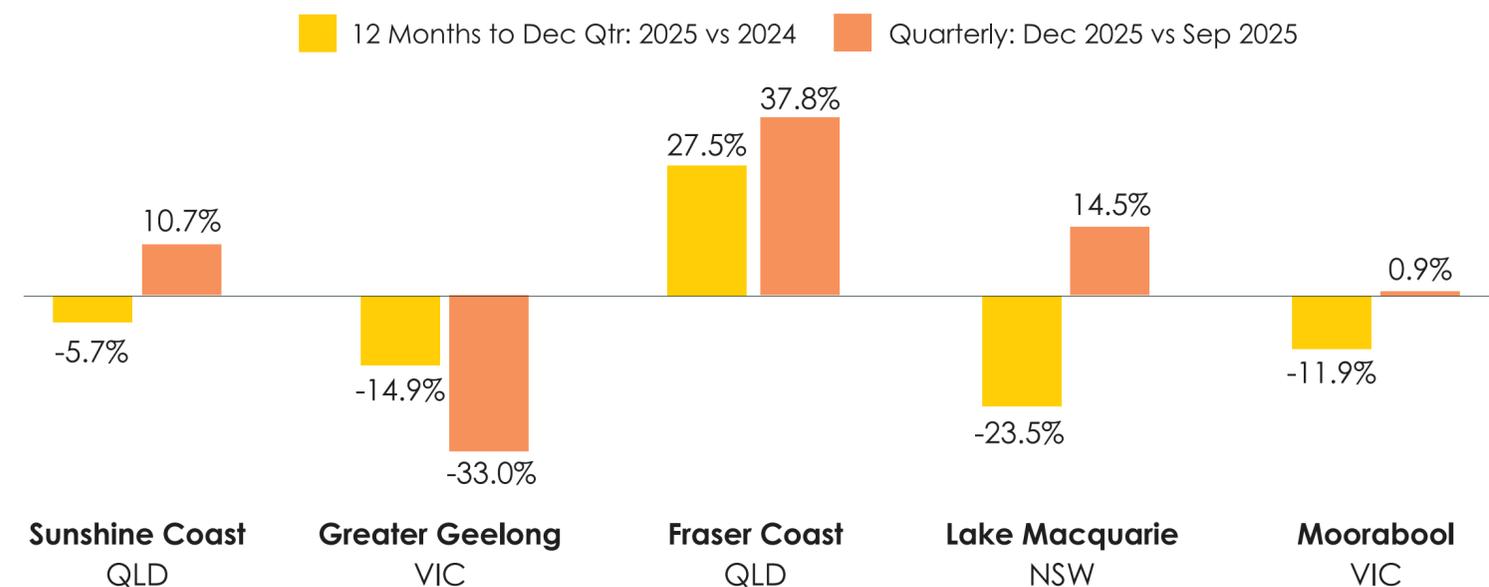
Of the top five LGAs this quarter, only the Fraser Coast experienced a higher net-migration growth rate compared to this time last year. The Sunshine Coast, Greater Geelong, Lake Macquarie, and Moorabool all experienced a decline of migration inflow between 5.7 per cent (Sunshine Coast) and 23.5 per cent (Lake Macquarie).

The Sunshine Coast's annual decline of 5.7 per cent appears to be driven by a decline in its share of region-to-region migration, given it received a growing share of capital city migrants (see p8).

Top Five LGAs by **share of total net internal migration** to regional Australia, 12 months to December 2025



Changes in **total net internal migration** inflows to Top Five LGAs



Net internal migration is: net flows (inflows – outflows) from capitals to regions + net flows (inflows – outflows) from region to region.

Regional Hotspots by Growth



Top Five LGAs: greatest growth in net internal migration inflows

Growth hotspots of net internal migration during the 12 months to the December 2025 quarter were again concentrated in the southern reaches of the country, with Tasmanian regions featuring prominently. These growth spots are all smaller regions far from capital city commuter belts.

The Meander Valley in Tasmania recorded the strongest level of internal migration growth, with most of the net growth coming from inter-regional migration. The growth composition of Tasmania's other hotspot, the Waratah/Wynyard region, was the inverse – with most of the movers coming from capital cities.

For these smaller, high-growth regions, net-migration growth was largely driven by inter-regional migration rather than capitals. In contrast, Lismore experienced a net movement toward capital cities rather than being a net beneficiary. Of the top five high-growth regions, only Waratah/Wynyard recorded growth driven primarily by movers from capital cities.

Top Five LGAs by annual growth in total net internal migration inflows
12 months to Dec 2025 vs 2024, % change



Most Popular Places for Capital City People



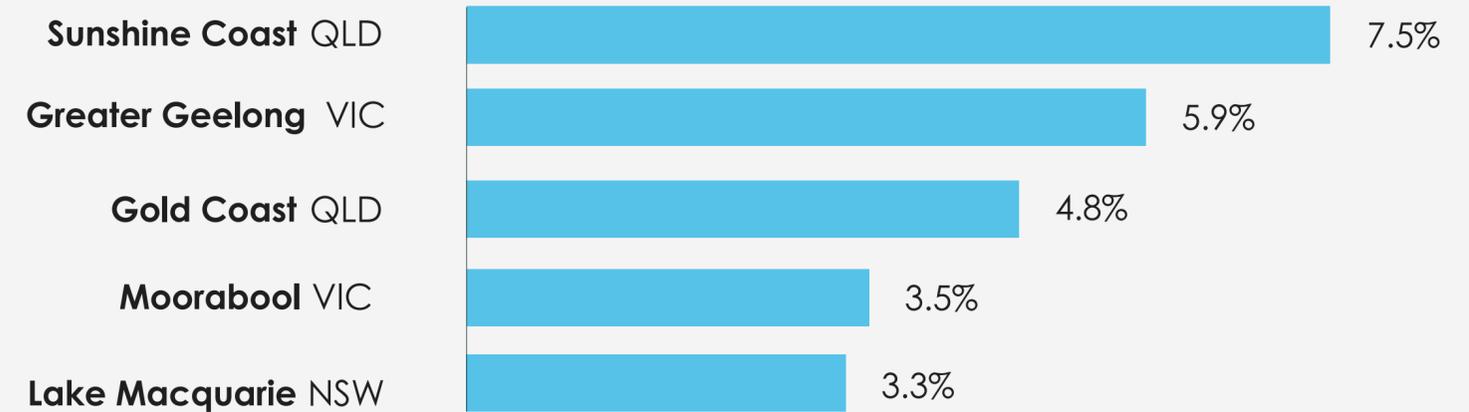
Top Five LGAs: largest net inflows from capitals

These regions across the country gained the highest share of population movement from capitals in net terms.

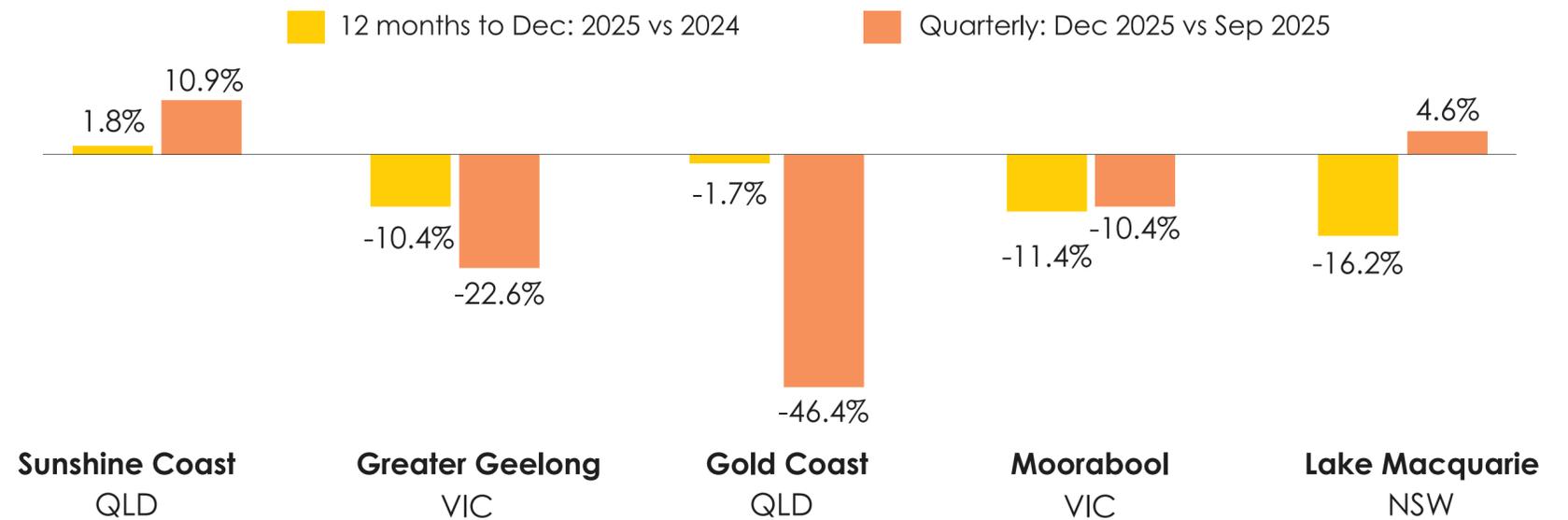
The top five hotspots remained unchanged from the previous September 2025 quarter. The Sunshine Coast is still the favourite for capital city movers, accounting for 7.5 per cent of net migration from capitals to regions, growing slightly (1.8 per cent change) from a year earlier (December 2024 quarter).

All other regions in the top five (Greater Geelong, the Gold Coast, Moorabool, and Lake Macquarie) experienced lower relative net-migration compared to this time last year. This suggests a slowdown of migration towards the perennial hotspots as movers likely seek value elsewhere, creating a more diversified migration away from capital cities.

Top Five LGAs by share of net capital-regional migration
12 months to Dec 2025



Quarterly and annual change in net capital-regional migration inflows to Top Five LGAs



Net migration inflows from capitals are inflows from capitals minus outflows to capitals.

Increasingly Popular Places for Capital City People



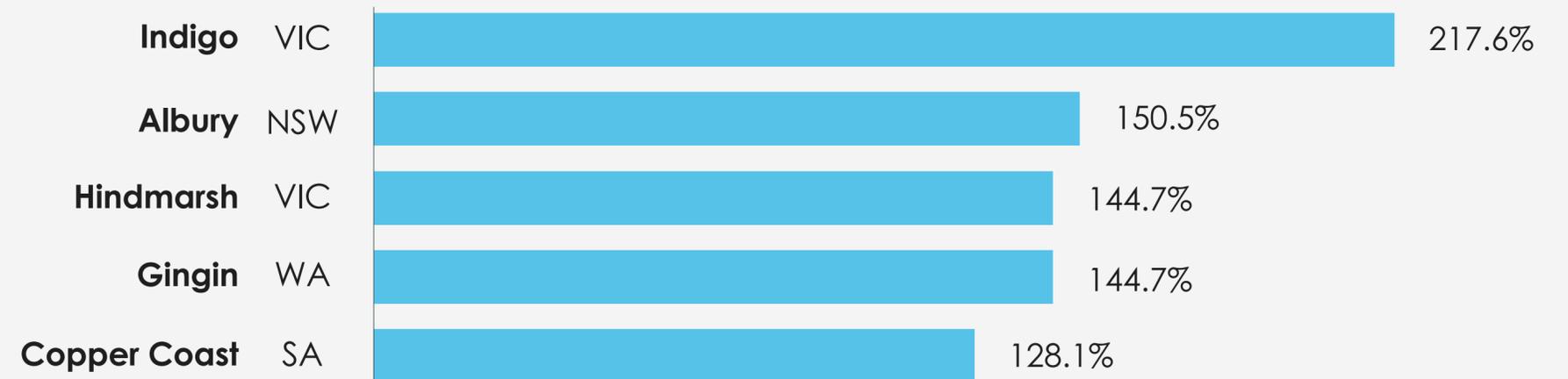
Top Five LGAs: greatest growth in net inflows from capitals

Growth hotspots for net inflows from capitals are spread widely across New South Wales, Victoria, South Australia and Western Australia.

The Victorian LGA of Indigo experienced the greatest growth in net migration from capitals – a 217.6 per cent increase in the 12 months to December 2025.

The New South Wales LGA of Albury (150.5 per cent) and Western Australia's Gingin (144.7 per cent) retained their high positions, with the Copper Coast (128.1 per cent), and Hindmarsh (144.7 per cent) rounding out the top five.

Top Five LGAs by annual growth in net capital-regional migration
12 months to Dec 2025 vs 2024, % change



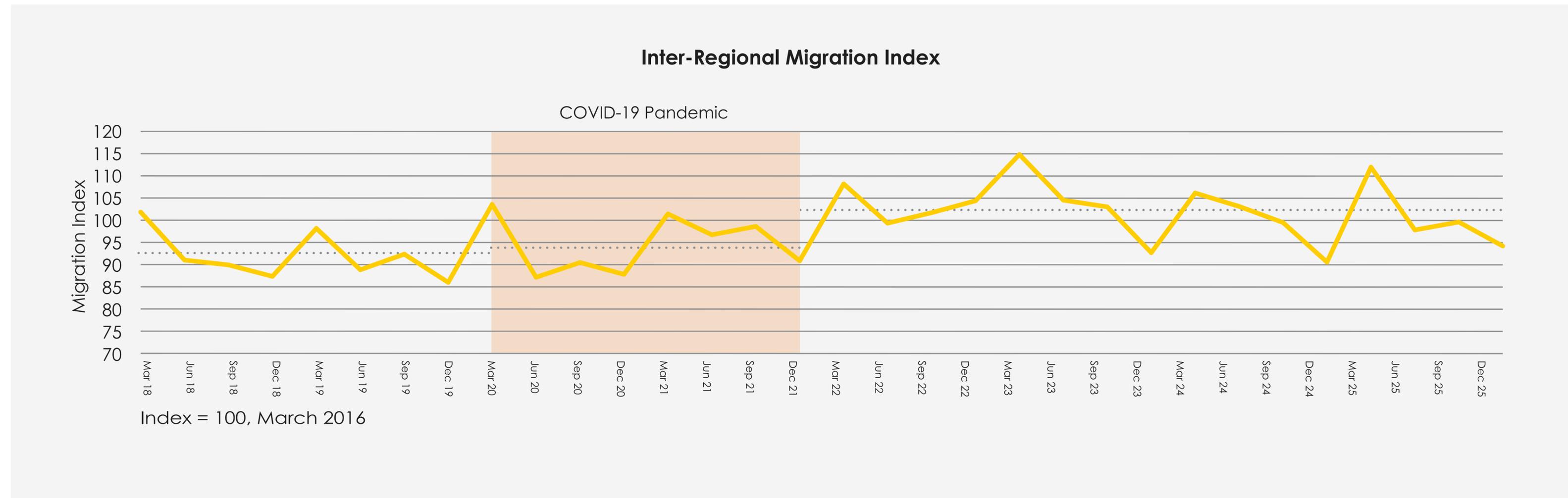
Inter-Regional Migration



Inter-regional migration holds steady

Inter-regional migration dropped by 5.4 per cent for the December 2025 quarter. The Index is currently sitting at 94.3, which is 7.6 per cent below the post-COVID average. This drop is relatively consistent with historical patterns, with December typically being the weakest quarter every year and March being the strongest.

When considering seasonality, the December 2025 quarter drop is actually smaller than expected based on the previous two December quarters, suggesting perhaps a slowing in the recent decline of region-to-region migration.



Most Popular Places for Regional People



Top Five LGAs: largest net inflows from regions

While this report primarily focuses on migration flows between capitals and regions, it is also the case that some regions across the country are gaining significant population from other regions, in net terms. Many of these regions receive net-inflows from other regions, as well as net inflows from capital cities.

In the 12 months to December 2025, Queensland's regions attracted the greatest number of net inter-regional migration, with Fraser Coast once again topping the list with 6.3 per cent of net regional-to-regional migration.

Maitland in New South Wales (5.2 per cent) retained second place in terms of inter-regional migrant attraction, with Toowoomba (4.5 per cent), the Sunshine Coast (4.3 per cent), and Shellharbour (4.0 per cent) rounding out the top five places.

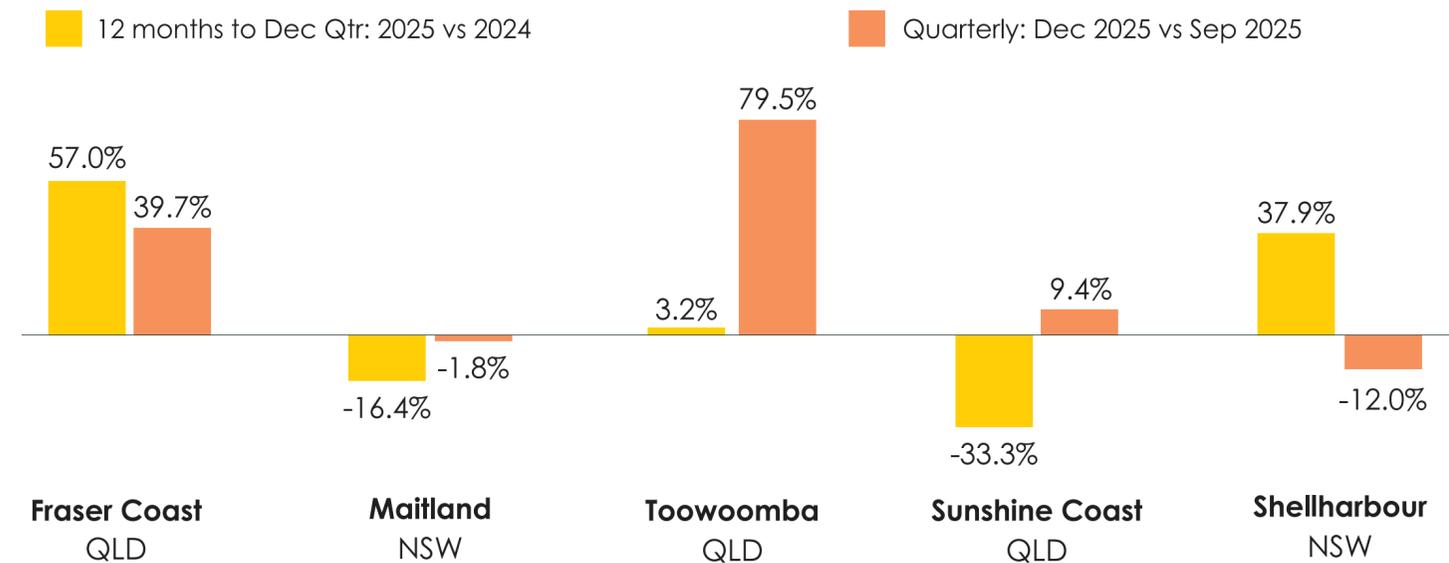
Migration to the Fraser Coast increased significantly compared to last year (57 per cent), suggesting accelerating interest in the region. Conversely, Maitland, Toowoomba and the Sunshine Coast all experienced a decline in inter-regional net migration.

It should be noted that the net migration inflows from regions are: inflows to a region minus the outflow to other regions.

Top Five LGAs by share of net regional-regional migration
12 months to Dec quarter 2025



Quarterly and annual change in net regional-regional migration inflows to Top Five LGAs



Increasingly Popular Places for Regional People



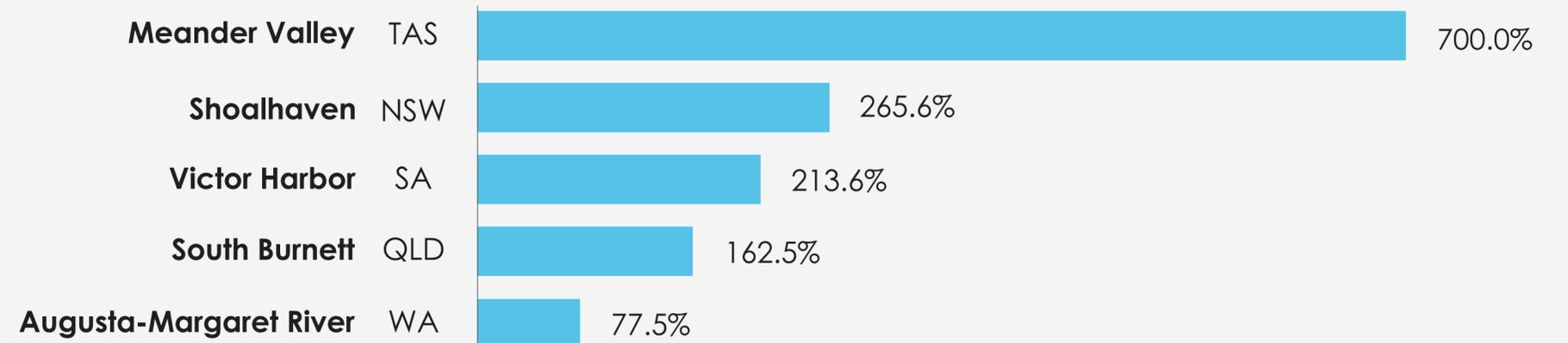
Top Five LGAs: greatest growth in net inflows from regions

The top five LGAs with the highest rates of growth in net migration from other regional locations are spread widely, spanning Tasmania, New South Wales, South Australia, Queensland and Western Australia.

Meander Valley ranked first, recording a growth rate more than two and a half times that of Shoalhaven, which placed second.

Victor Harbor, South Burnett and Augusta-Margaret River round out the top five places experiencing the strongest growth in net migration from other regions during the last 12 months.

Top Five LGAs **by annual growth in net regional-regional migration**
12 months to Dec quarter 2025 vs 2024, % change



Appendix



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A1: Regional Movers Index

Methodology Notes



- 1 CBA-RAI Regional Movers Index is defined as movement of CBA customers from capital cities to regional areas (see A1.2). Index = 100, March 2016 quarter.
- 2 Customer movement or population flows refers to CBA 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 Relocations within capitals and within regions are those that are across different LGAs. That is, relocations WITHIN a given LGA are not considered or counted as a relocation. See A4 Note on methodology p20: definitions of inter-regional, inter-capital, region-capital and capital-region migration.
- 5 The Net regional migration index is calculated as movement from capital areas to regional less movement from regional areas to capital cities. Index = 100, March 2016 quarter.
- 6 LGAs are defined through ABS 1270.0.55.003 ASGS Volume 3 – Non ABS Structures.
- 7 To be listed on the RMI appendix – and considered for the various Top 5 rankings – an LGA must:
 - Have had net internal migration inflows in last 12 months to December 2025 of 50 or more people.
 - Have had a base of net internal migration, net capital-region or net region-region inflows in 12 months to December 2024 of more than 10 people. This is to filter out significant outlier results associated with changes in small numbers. Significant outlier growth rates are not published or ranked.
- 8 Fourteen 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.
- 9 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 June 2021 for December 2020 reference period).
- 10 The Business Banking business unit of the Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945 (Bank) has prepared this report. References to the “Group” are to the Bank and its subsidiaries (including Commonwealth Securities Limited ABN 60 067 254 300 AFSL 238814, Commonwealth Australia Securities LLC and CBA Europe Ltd) and includes the directors, employees and representatives of the Bank and its subsidiaries.

A2: All LGAs

Share of Migration, Changes in Total Net Internal Migration



LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Dec 2025 vs 12 months to Dec 2024 (%)
Sunshine Coast (R)	QLD	8.9%	7.5%	4.3%	-5.7%
Greater Geelong (C)	VIC	6.8%	5.9%	2.8%	-14.9%
Fraser Coast (R)	QLD	3.9%	1.9%	6.3%	27.5%
Lake Macquarie (C)	NSW	3.6%	3.3%	1.0%	-23.5%
Moorabool (S)	VIC	3.4%	3.5%	-0.4%	-11.9%
Maitland (C)	NSW	3.1%	1.5%	5.2%	-8.3%
Shoalhaven (C)	NSW	2.6%	2.2%	1.4%	17.9%
Cessnock (C)	NSW	2.6%	1.4%	3.8%	0.6%
Greater Bendigo (C)	VIC	2.6%	1.5%	3.2%	22.2%
Shellharbour (C)	NSW	2.5%	1.2%	4.0%	11.0%
Mid-Coast (A)	NSW	2.3%	2.1%	0.8%	12.9%
Port Macquarie-Hastings (A)	NSW	2.3%	1.7%	1.8%	0.0%
Ballarat (C)	VIC	2.0%	1.7%	1.1%	-14.6%
Tweed (A)	NSW	2.0%	1.2%	2.6%	34.9%
Busselton (C)	WA	1.8%	1.3%	1.6%	12.5%
Gympie (R)	QLD	1.8%	0.6%	4.0%	-2.9%
Toowoomba (R)	QLD	1.8%	0.4%	4.5%	16.1%
Townsville (C)	QLD	1.8%	0.9%	2.7%	30.8%
Bass Coast (S)	VIC	1.6%	1.5%	0.5%	8.5%
Port Stephens (A)	NSW	1.6%	1.1%	1.5%	-17.1%
Bundaberg (R)	QLD	1.5%	0.8%	2.1%	10.2%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Dec 2025 vs 12 months to Dec 2024 (%)
Augusta-Margaret River (S)	WA	1.5%	1.0%	1.5%	50.9%
Livingstone (S)	QLD	1.3%	0.4%	2.8%	-1.4%
Ballina (A)	NSW	1.3%	0.8%	1.4%	-5.8%
East Gippsland (S)	VIC	1.2%	1.0%	0.6%	21.3%
Snowy Valleys (A)	NSW	1.2%	1.3%	-0.2%	32.7%
Surf Coast (S)	VIC	1.1%	1.1%	0.1%	78.8%
Albury (C)	NSW	1.1%	0.9%	0.5%	11.4%
Noosa (S)	QLD	1.0%	1.4%	-1.2%	38.4%
Alexandrina (DC)	SA	1.0%	0.9%	0.3%	41.2%
Baw Baw (S)	VIC	0.9%	1.3%	-1.2%	-51.0%
South Burnett (R)	QLD	0.9%	0.7%	0.7%	42.1%
Hindmarsh (S)	VIC	0.9%	1.0%	-0.3%	236.5%
Wingecarribee (A)	NSW	0.9%	1.5%	-1.9%	5.1%
Victor Harbor (C)	SA	0.8%	0.6%	0.8%	46.8%
Gold Coast (C)	QLD	0.8%	4.8%	-12.7%	-36.3%
Albany (C)	WA	0.8%	0.4%	1.0%	9.6%
Greater Geraldton (C)	WA	0.8%	0.4%	1.2%	81.4%
Byron (A)	NSW	0.7%	1.3%	-1.9%	-12.9%
Orange (C)	NSW	0.7%	0.8%	-0.4%	-18.9%
Scenic Rim (R)	QLD	0.7%	0.1%	1.6%	-24.1%
Wodonga (C)	VIC	0.6%	0.4%	0.8%	45.0%

* a negative share of Net Regional-Regional Migration indicates the LGA experienced a net outflow of people to other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of outflows from all LGAs that experienced a net outflow of people to other regions

* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p19 on the Appendix A4 for definitions and methodology.

A2: All LGAs

Share of Migration, Changes in Total Net Internal Migration



LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Dec 2025 vs 12 months to Dec 2024 (%)
Eurobodalla (A)	NSW	0.6%	0.6%	0.0%	1.2%
Devonport (C)	TAS	0.6%	0.4%	0.8%	41.5%
Clarence Valley (A)	NSW	0.6%	0.2%	1.4%	-41.6%
Latrobe (C) (Vic.)	VIC	0.6%	0.6%	0.0%	-46.9%
Moira (S)	VIC	0.6%	0.5%	0.3%	1.3%
Golden Plains (S)	VIC	0.6%	0.2%	1.1%	-15.1%
Nambucca Valley (A)	NSW	0.6%	0.2%	1.1%	210.0%
Bega Valley (A)	NSW	0.6%	0.4%	0.5%	-17.9%
Meander Valley (M)	TAS	0.5%	0.2%	1.2%	500.0%
Goulburn Mulwaree (A)	NSW	0.5%	0.4%	0.4%	8.3%
Northam (S)	WA	0.5%	0.4%	0.5%	30.0%
Warrnambool (C)	VIC	0.5%	0.3%	0.7%	382.8%
Capel (S)	WA	0.5%	0.1%	1.2%	16.0%
Murray River (A)	NSW	0.5%	0.3%	0.7%	-14.6%
Gladstone (R)	QLD	0.5%	0.1%	1.0%	-62.0%
Southern Downs (R)	QLD	0.5%	0.5%	0.0%	-11.9%
Wellington (S)	VIC	0.4%	0.4%	0.0%	18.6%
Tablelands (R)	QLD	0.4%	0.1%	1.0%	9.2%
Copper Coast (DC)	SA	0.4%	0.3%	0.4%	86.4%
Benalla (RC)	VIC	0.4%	0.2%	0.5%	21.1%
Colac-Otway (S)	VIC	0.4%	0.4%	0.0%	269.0%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Dec 2025 vs 12 months to Dec 2024 (%)
Harvey (S)	WA	0.4%	0.3%	0.4%	-50.5%
Lismore (C)	NSW	0.4%	0.3%	0.3%	457.9%
Bunbury (C)	WA	0.4%	0.3%	0.2%	-13.0%
Ceduna (DC)	SA	0.4%	0.3%	0.1%	42.0%
Gingin (S)	WA	0.4%	0.3%	0.0%	54.0%
East Pilbara (S)	WA	0.3%	0.3%	0.0%	80.8%
Bathurst Regional (A)	NSW	0.3%	0.4%	-0.3%	193.5%
Mount Alexander (S)	VIC	0.3%	0.5%	-0.6%	-16.5%
Strathbogie (S)	VIC	0.3%	0.4%	-0.1%	-26.6%
Dungog (A)	NSW	0.3%	0.2%	0.5%	109.3%
Lithgow (C)	NSW	0.3%	0.6%	-0.9%	40.6%
Campaspe (S)	VIC	0.3%	0.6%	-0.9%	-31.5%
Broome (S)	WA	0.3%	0.3%	0.0%	22.5%
Latrobe (M) (Tas.)	TAS	0.3%	0.1%	0.7%	0.0%
Yass Valley (A)	NSW	0.3%	0.5%	-0.5%	5.1%
Hepburn (S)	VIC	0.3%	0.5%	-0.6%	164.5%
Kempsey (A)	NSW	0.3%	0.2%	0.2%	-42.4%
Mid Murray (DC)	SA	0.3%	0.3%	0.1%	-2.5%
Richmond Valley (A)	NSW	0.3%	0.1%	0.5%	-36.6%
Northampton (S)	WA	0.3%	0.1%	0.5%	79.1%
Barossa (DC)	SA	0.3%	0.4%	-0.3%	-33.0%

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A2: All LGAs

Share of Migration, Changes in Total Net Internal Migration



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Mid-Western Regional (A)	NSW	0.3%	0.5%	-0.8%	-56.6%
Denmark (S)	WA	0.3%	0.2%	0.2%	-6.4%
Southern Midlands (M)	TAS	0.3%	0.3%	0.0%	108.6%
Break O'Day (M)	TAS	0.3%	0.2%	0.2%	213.0%
South Gippsland (S)	VIC	0.3%	0.6%	-1.0%	100%
Yankalilla (DC)	SA	0.3%	0.2%	0.1%	44%
Indigo (S)	VIC	0.3%	0.2%	0.2%	238%
Glenelg (S)	VIC	0.3%	0.2%	0.1%	169%
Huon Valley (M)	TAS	0.3%	0.2%	0.3%	84%
Glamorgan/Spring Bay (M)	TAS	0.2%	0.2%	0.2%	66%
Mansfield (S)	VIC	0.2%	0.3%	-0.2%	-35%
Queenscliffe (B)	VIC	0.2%	0.2%	0.1%	4.8%
Waratah/Wynyard (M)	TAS	0.2%	0.1%	0.4%	392.3%
Yorke Peninsula (DC)	SA	0.2%	0.2%	0.2%	-13.7%
Light (RegC)	SA	0.2%	0.3%	-0.1%	-15.1%
Loddon (S)	VIC	0.2%	0.1%	0.3%	408.3%
Bridgetown-Greenbushes (S)	WA	0.2%	0.2%	0.1%	400.0%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Dec 2025 vs 12 months to Dec 2024 (%)
Exmouth (S)	WA	0.2%	0.2%	0.0%	-4.8%
Murrindindi (S)	VIC	0.2%	0.3%	-0.3%	-7.8%
Ararat (RC)	VIC	0.2%	0.2%	0.1%	123.1%
Chittering (S)	WA	0.2%	0.3%	-0.4%	5.6%
Burdekin (S)	QLD	0.2%	0.1%	0.5%	69.7%
Douglas (S)	QLD	0.2%	0.4%	-0.5%	124.0%
Cootamundra-Gundagai Regional (A)	NSW	0.2%	0.2%	0.2%	175.0%
George Town (M)	TAS	0.2%	0.1%	0.3%	175.0%
Murray Bridge (RC)	SA	0.2%	0.1%	0.2%	-45.0%
Central Goldfields (S)	VIC	0.2%	0.2%	-0.1%	76.7%
Whitsunday (R)	QLD	0.2%	0.4%	-0.6%	-78.8%
Coolamon (A)	NSW	0.2%	0.1%	0.4%	36.8%
Irwin (S)	WA	0.2%	0.1%	0.3%	147.6%
Wangaratta (RC)	VIC	0.2%	0.3%	-0.5%	2.0%
Greater Hume Shire (A)	NSW	0.2%	0.1%	0.4%	104.0%
Gwydir (A)	NSW	0.2%	0.1%	0.3%	-3.8%
Toodyay (S)	WA	0.2%	0.2%	0.0%	-23.1%

* a negative share of Net Regional-Regional Migration indicates the LGA experienced a net outflow of people to other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of outflows from all LGAs that experienced a net outflow of people to other regions

* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p19 on the Appendix A4 for definitions and methodology.

A4: Note on methodology

Net migration and population growth



The Regional Movers Index publication was established at the height of the COVID-19 pandemic to answer the pertinent question at the time: were capital city people fleeing to the regions? The RMI showed this to be well and truly the case. It also highlighted that regional people were tending to stay in regions and avoid those severe capital-city lockdowns.

Now that Australia is living with COVID and population flows from regions to capitals have resumed, the RMI publication is honing its focus to understand the **NET** migration inflows that Australia's regions are continuing to experience. That is, the RMI is now not only considering the one-way flow of population movements from capitals to regions, but it is also considering the population movements in the other direction, by focusing on net flows. The RMI publication is also now considering the breakdown of net migration flows into the various regional LGAs: net migration from capital cities and net migration from other regions. Together, this provides an invaluable source of information on a key driver of local population changes: net internal migration.

A region's population will change according to changes in:

- Its **natural increase** – local births minus deaths
- Its **net overseas migration** – overseas people moving in minus local people moving overseas
- Its **net internal migration** – people from other regions (within Australia) moving in minus local people moving to other regions (within Australia)
- Calculated as:
Total Net internal migration = Net flows (inflows – outflows) from Capital to Region + Net flows (inflows – outflows) from Region to Region

The RMI's reporting on net internal migration sheds much-needed light on this notorious swing variable underneath total population changes. It will also provide policymakers, industry and communities with the added understanding of local population dynamics driven by capital city versus regional migration patterns.

A4: Note on methodology

Ranking the Top Five LGAs



In considering net internal migration – and its constituent parts of net migration from capitals and net migration from other regions – this edition of the RMI ranks regions accordingly, i.e. based on:

- (1) **Total Net Internal Migration** – the report identifies the top five regional local government areas receiving the largest net internal migration inflows (irrespective of whether these inflows are from capitals or other regions) during the 12 months to December 2025. It also identifies the top five regional LGAs that have experienced the most significant growth in net internal migration inflows (again, irrespective of whether these inflows are from capitals or other regions).
- (2) **Net Capital-to-Regional Migration** – the report identifies the top five regional LGAs receiving the largest net migration inflows **from capital cities**. It does so by identifying and ranking the regions that have received the greatest share of total net migration inflows from all capitals to all regional LGAs. It also identifies the top five regional LGAs that have experienced the most significant growth in net migration inflows from capital cities.
- (3) **Net Region-to-Region Migration** – the report identifies the top five regional LGAs receiving the largest net migration inflows **from regional areas**. It does so by identifying the regions that have experienced the greatest share of total net migration inflows **among the regional LGAs that have experienced net inflows**. The report also identifies the top five regional LGAs that have experienced the most significant growth in net migration inflows from regional areas.

Regarding the ranking of regions experiencing the most significant growth in net migration inflows, the RMI has sought to filter out – and not include in the rankings – significant outlier results due to changes in small numbers. There are many regional LGAs with small populations prone to experiencing small net internal migration flows and therefore large percentage changes in growth rates. These places are not included in the RMI rankings. Specifically, an LGA must meet two criteria to be considered and ranked in the RMI publication:

1. The LGA must have experienced total net internal migration inflows in the previous 12 months of 50 or more people
2. The LGA must have experienced net internal migration inflows from either capitals or other regions of more than 10 people in the base period. Specifically:
 - a) LGAs where the net migration **inflows from either capitals or regions were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in total net migration inflows.
 - b) LGAs where the net migration **inflows from capitals were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in net migration **inflows from capitals**.
 - c) And LGAs where the net **migration inflows from other regions were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in net migration inflows **from regions**.

A4: Note on methodology



Definitions of inter-regional, inter-capital, region-to-capital and capital-to-region migration

The Regional Movers Index publication focuses on migration (as indicated by CBA customer relocations) from capital cities to regions. Specifically, the relocations from capital-city Local Government Areas to regional LGAs. Since December 2022 the publication also considers (but previously hadn't focused on) migration in the other direction – from regional LGAs to capital-city LGAs. These relocations are necessarily between different LGAs (with some exceptions noted in Appendix A1).

Other relocations that occur during any given quarter are those within and between capital-cities and also those within and between regions. In addition to relocations between different LGAs, a significant number of relocations in any given quarter are within a given LGA – households changing their homes, but remaining within their overall community.

Until December 2022 the RMI publication **included** these relocations within its overall analytical framework. Including these gives a higher number of relocations than excluding and this influences the numbers in the RMI report up to that issue showing the shares that each type of relocation accounts for out of all relocations. These shares are highlighted typically at the beginning of each quarter's publication (see. Table, **Breakdown of total internal migration** on p3 of December 2022 edition). Under that analytical framework, of all relocations:

- those within regional Australia account for roughly 22 per cent;
- those from regional Australia to capitals account for around 4 per cent;
- those from capitals to regional Australia account for around 6 per cent, and
- those within and between capitals account for around 68 per cent this latest quarter.

From December 2022 the Regional Movers Index publication includes additional detailed analysis on inter-regional migration – migration within and between Australia's regions. This is to provide an indication of another key source of population growth at the LGA level (beyond the inflows from capital-city LGAs). Relocations within a given regional LGA will not affect that LGA's overall population, and excluding these moves does not affect the RMI analysis of capital to regional flows or regional to capital flows. To get more accurate results of relocations between regions, the RMI now uses a revised analytical framework to **exclude** relocations that occur within any given LGA. We have applied this framework across the relevant elements of the publication for internal consistency. Under this revised analytical framework, we are analysing fewer but what might be called major relocations (see Table, **Breakdown of total major relocations** of p3 of this edition). Reducing the base number of relocations has changed the relative shares:

- those within regional Australia account for roughly 12 per cent;
- those from regional Australia to capitals account for around 9 per cent;
- those from capitals to regional Australia account for around 12 per cent, and
- those within and between capitals account for around 67 per cent this latest quarter.

Rebasing the analysis does not change the historical pattern of **capital city to regional** flows or **regional to capital** flows that underpin the RMI net migration index.