

# Regional Movers Index

CBA > Decision Science >  
Ventures, Innovation and Sustainability

December 2022 Quarter Report

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# What is Regional Movers Index?



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

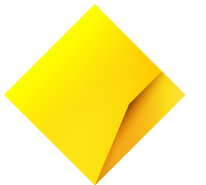
The **Index** is a partnership between CBA and the Regional Australia Institute (RAI), powered by analysis of proprietary data to create an up-to-date and granular picture of a large sample of relocations.

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.

Established at the height of the COVID-19 pandemic to track the movement of capital city people to the regions, the RMI publication has also highlighted that regional people were tending to stay in regions and avoid those severe capital-city lockdowns. Now that Australia is largely living with COVID and population flows from regions to capitals have resumed, the RMI publication is honing its focus on the **net** migration inflows that Australia's regions are continuing to experience. See pp17-19 in the Appendix for details on the various revisions to the methodology that focuses on these net flows.

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- The **Index** is powered by CBA data from relocations amongst its 16 million customers.
  - Quarterly and annual changes are presented in the Index.
  - The **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 hot spots needing fresh thinking on housing and infrastructure.

# Regional Movers Index



## City dwellers still flocking to the regions

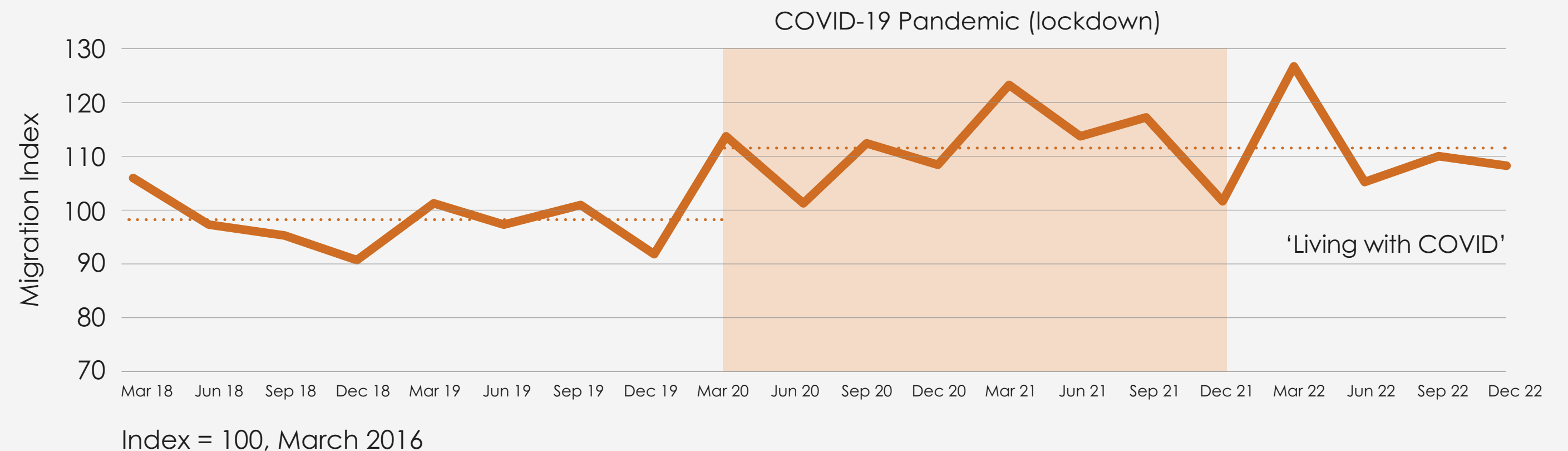
Capital to regional migration remained elevated throughout 2022, tracking at a level virtually unchanged from the height of the pandemic and around 16 per cent higher than the pre-COVID levels of 2018 and 2019.

Looking at the December 2022 quarter specifically, it marked the smallest seasonal decline in migration for a December quarter since the series began five years ago, dipping by just 0.8 per cent. Capital to regional migration in the December quarter typically falls in the order of 8 per cent.

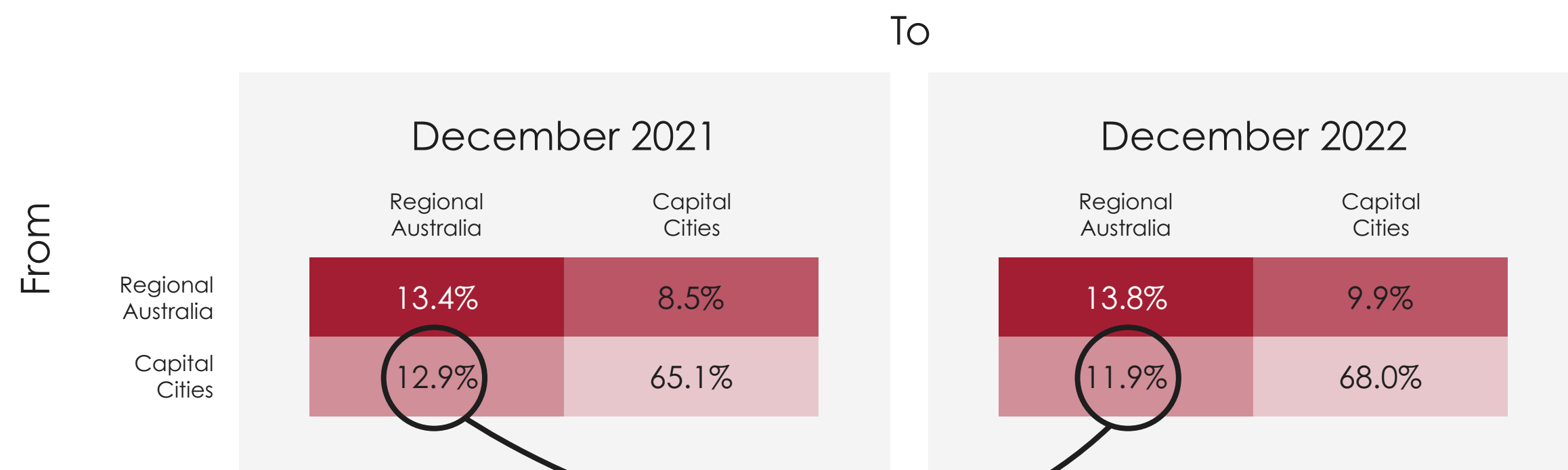
While city people's appetite for the regions hasn't waned, the migration flows in the other direction – from regions back to capitals – continue to pick up from those reduced flows of 2020 and 2021. In the December 2022 quarter, regional to capital migration accounted for 9.9 per cent of all relocations, up from an 8.5 per cent share a year earlier.

See p19, Note on methodology: definitions of inter-regional, inter-capital, region-region and capital-region migration – discussing the shares under this breakdown of total major relocations.

**Regional Movers Index: Population flows from Capital cities to Regional Australia**



## Breakdown of total relocations within Australia



# Net Internal Migration to Regional Australia

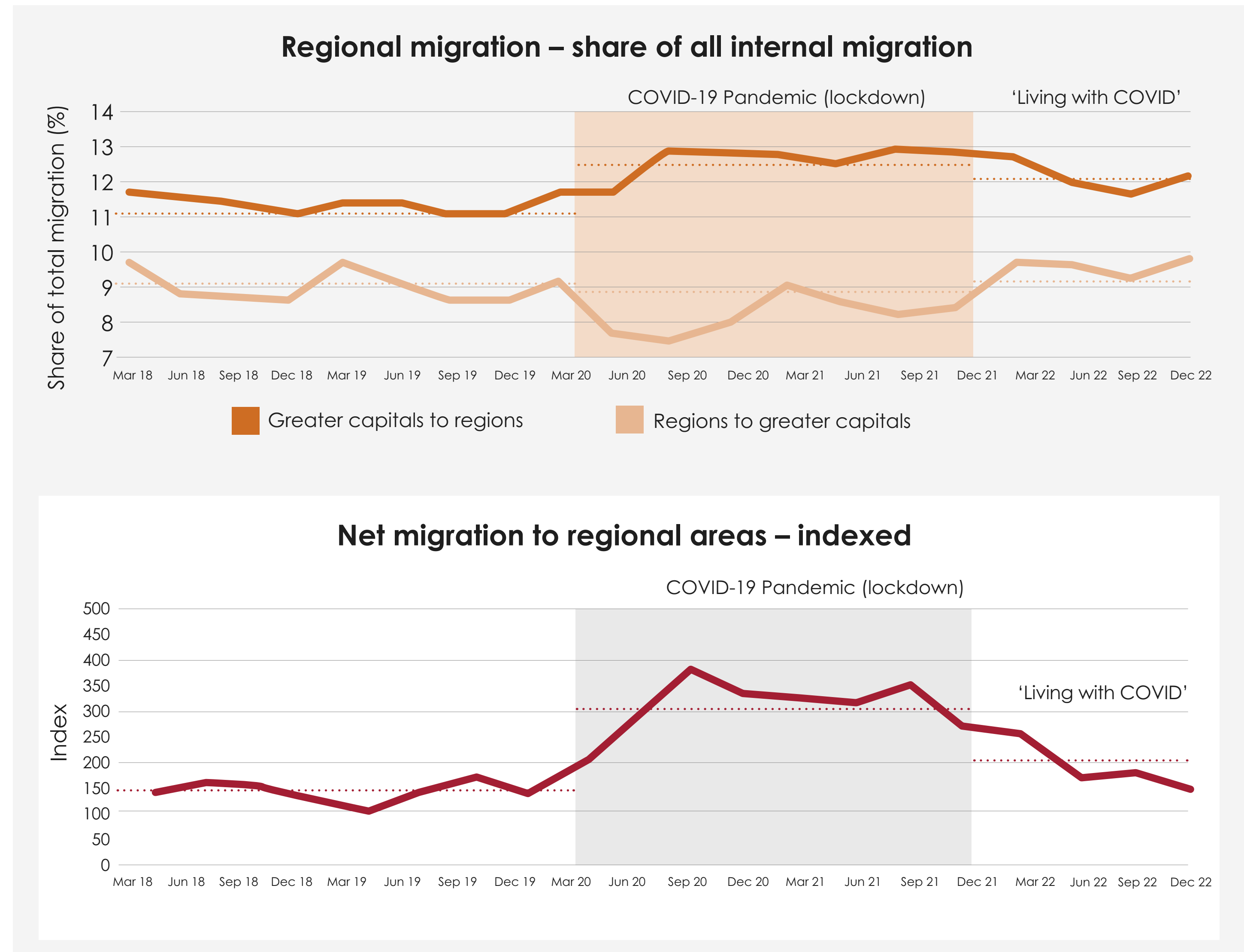
## Net migration to regions down but still elevated

The migration flows from capitals to regions have largely stabilised at an elevated level over the past year to account for an average 12 per cent of total migration flows – up from an average 11 per cent share pre-COVID.

Meanwhile, migration from regions to capitals are making up for lost ground during 2020 and 2021. These flows grew to their highest level in the series' history to account for 10 per cent of internal migration in the December 2022 quarter.

Accordingly, net migration to regional areas has been trending downwards over much of the past two years. The level of net migration from capitals to regions fell by 22 per cent in the December quarter to be 48.7 per cent lower than a year earlier.

The base from which these declines are occurring is historically high. Overall net migration from capitals to regions in 2022 still averaged 45 per cent more than the average in the two years prior to the pandemic.



# Migration Patterns By State

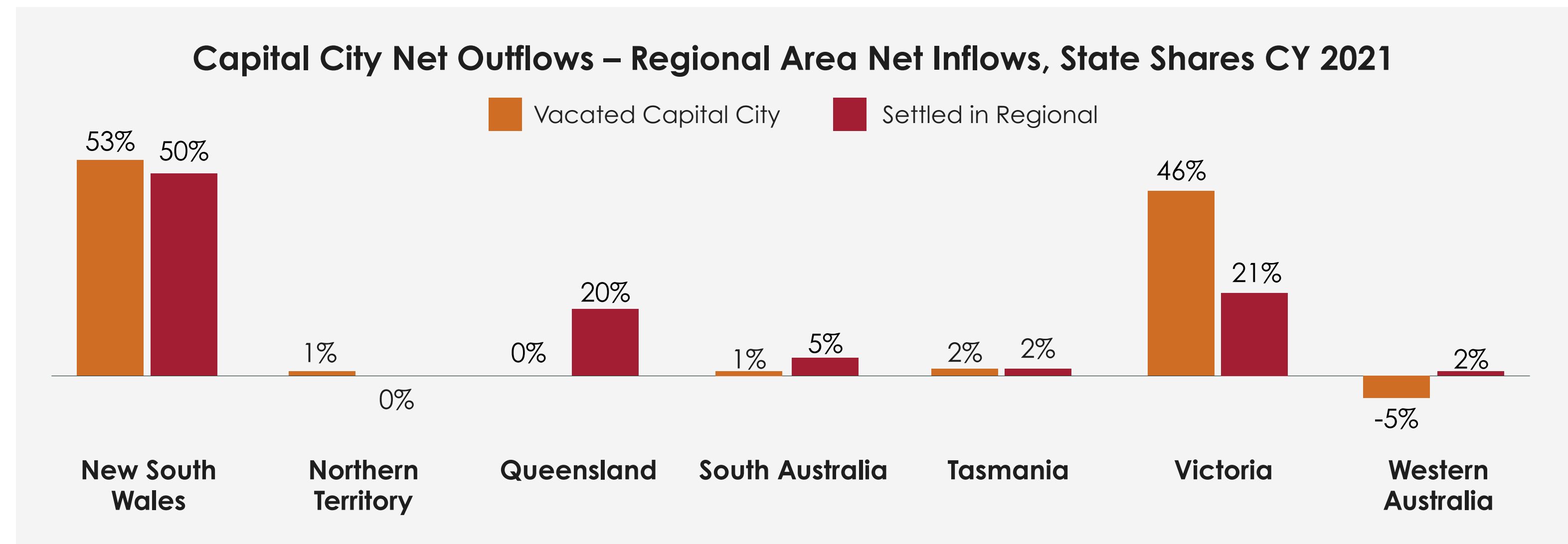
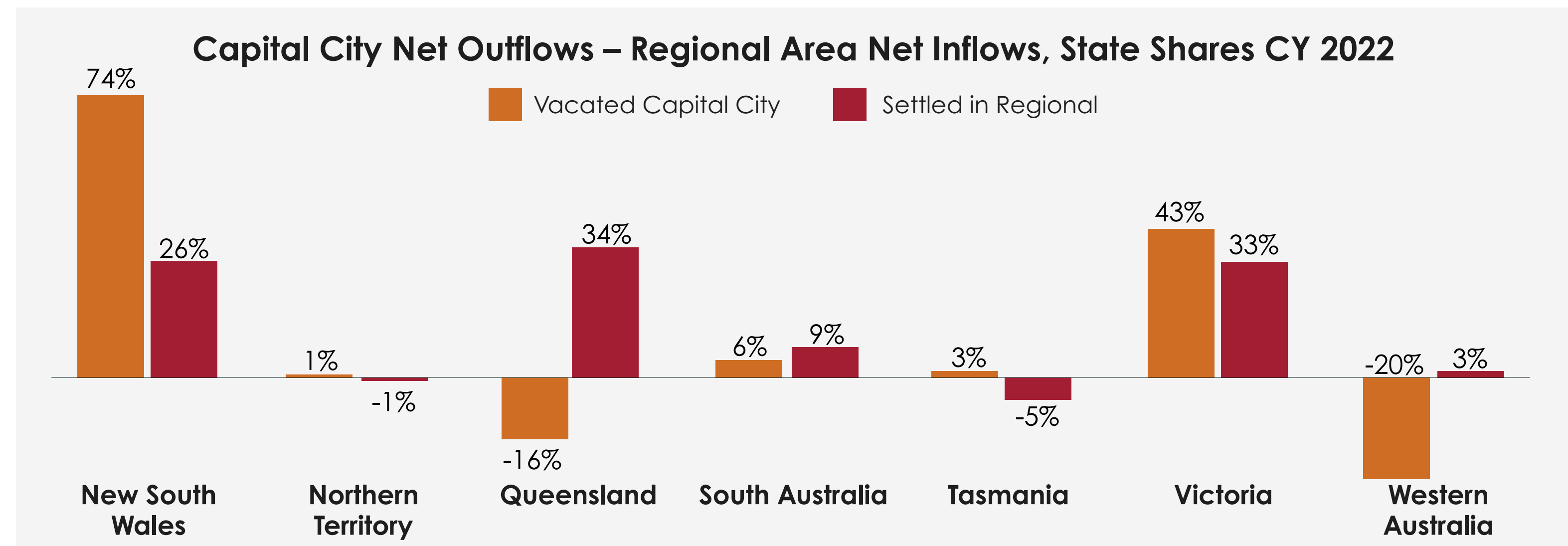
## Regional Queensland and Victoria surge ahead of regional NSW in popularity

The charts opposite 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**.

Regional Queensland and Victoria surged ahead in popularity, enticing the largest share of net outflows from cities to regions at 34 and 33 per cent, respectively (up from 20 and 21 per cent in 2021). In contrast, regional New South Wales fell out of favour to account for 26 per cent of net capital outflows, about half its 50 per cent share in 2021.

Looking at the key sources of capital-regional migration during 2022; Sydney accounted for the lion's share of these net outflows to the regions at 74 per cent, up from 53 per cent in 2021. Net outflows from Melbourne remained relatively steady at 43 per cent (compared to 46 per cent in 2021). Adelaide, meanwhile, became a more important source of net outflows from capitals, with its share increasing from 1 per cent in 2021 to 6 per cent in 2022.

Bucking the trend, Perth and Brisbane proved enticing for those moving from other capital cities and regions to record strong net migration inflows in 2022 – accounting for negative shares of the net outflows from capitals in 2021 and 2022.



# Regional Hotspots

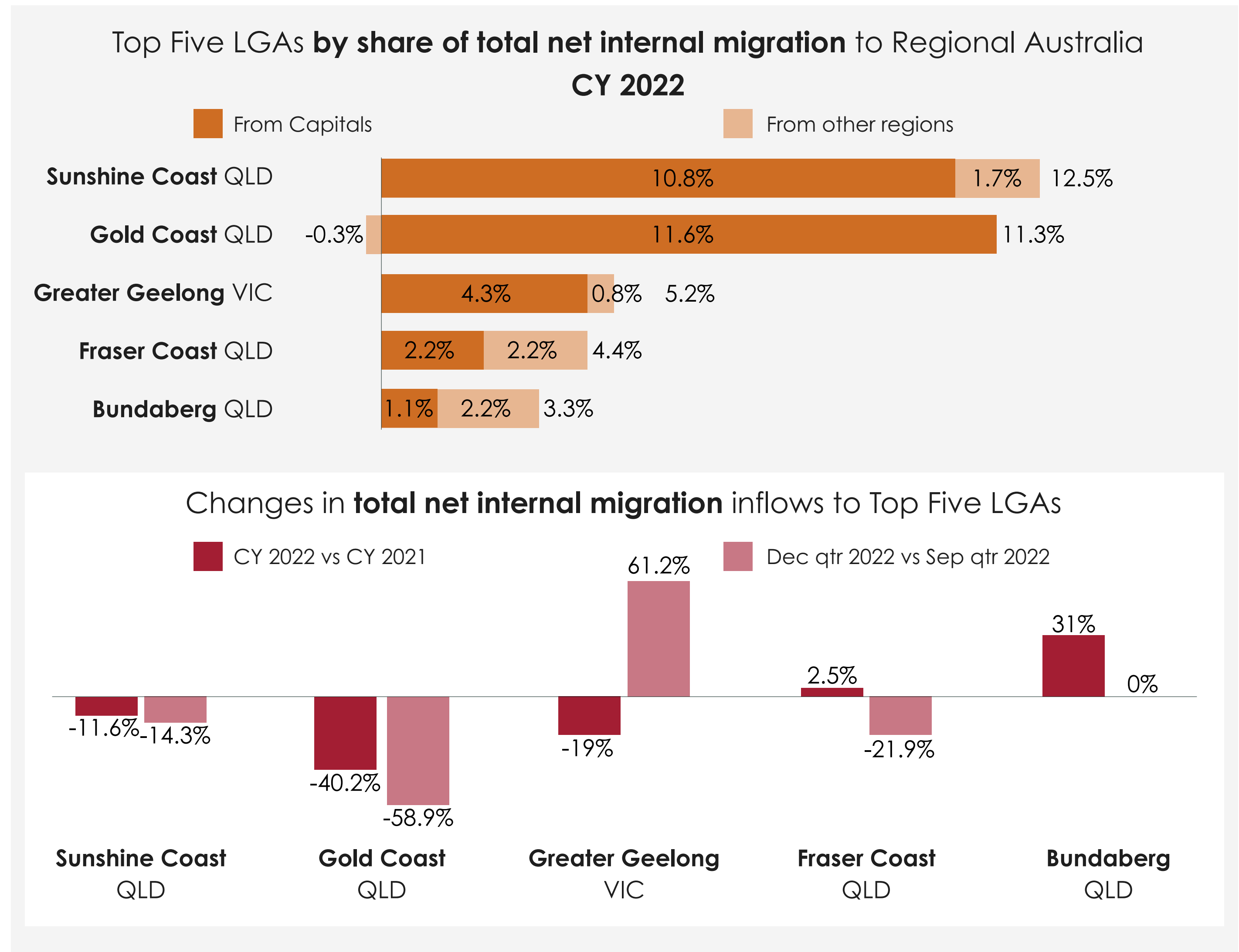
## Top Five LGAs: the largest net internal migration inflows

The regional Local Government Areas (LGAs) experiencing the largest net internal migration inflows in 2022 had a clear coastal Queensland theme in 2022, with the Sunshine Coast topping the list. Greater Geelong – receiving the third largest net internal migration inflows – was the only LGA outside of Queensland to make the Top Five.

Regular watchers of the Regional Movers Index publication will notice other LGAs typically highlighted – Newcastle and Wollongong – did not make this list. While these major centres close to Sydney experience significant population inflows from capitals, they also experience significant outflows (mainly to other regions, but also back to capitals), which is now captured in the new methodology. In 2022, the outflows from Newcastle and Wollongong to other regions saw them out of the running for the Top Five LGAs.

Enter the new kids on the block: Queensland’s Fraser Coast and Bundaberg. These smaller and more remote LGAs received the fourth and fifth largest net migration inflows in 2022, respectively. These inflows were also more evenly sourced from both capitals and other regions – a contrast to those major centres where net migration was driven predominantly by net inflows from capitals. In fact in 2022 the Gold Coast saw a net outflow of migration to other regions.

In 2022, net internal migration to most of the Top Five LGAs declined. Bundaberg was the exception, with net inflows up by 31 per cent in 2022, while Fraser Coast remained relatively steady with a 2.5 per cent rise.



# Regional Hotspots

## Top Five LGAs: greatest growth in net internal migration inflows

The regional LGAs experiencing the greatest growth in net internal migration inflows in 2022, compared with 2021, are spread across the country and are conspicuously distant from Sydney and Melbourne. Each of these LGAs saw three- to four-fold increases in net internal migration in 2022, compared with 2021.

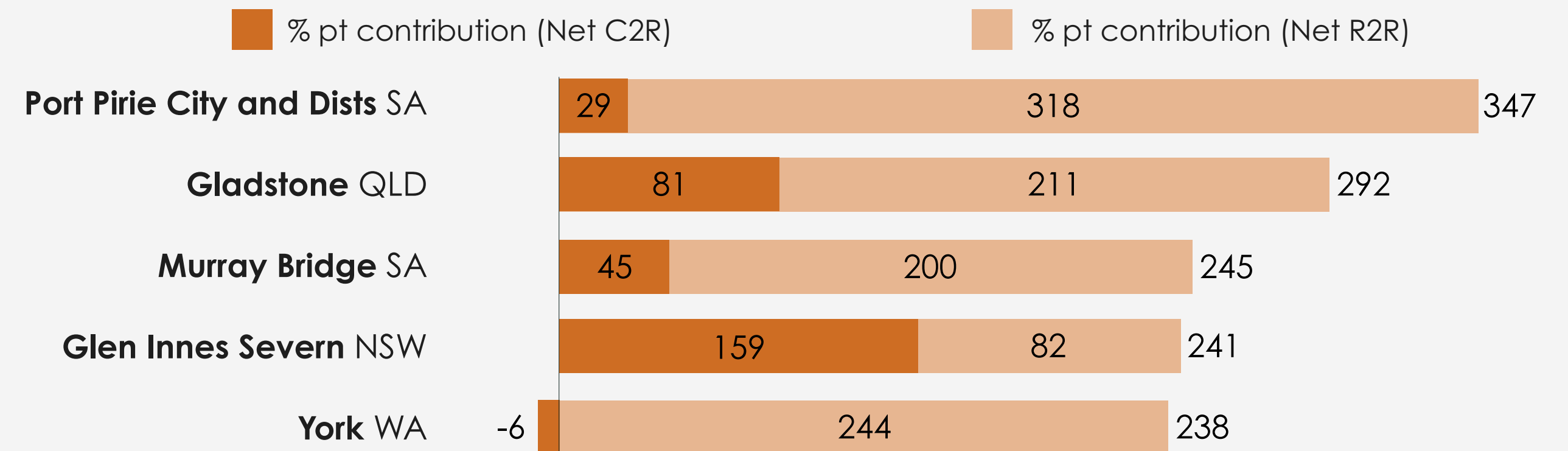
Topping the list is South Australia's Port Pirie and Districts, where there was a more than four-fold annual increase in net internal migration inflows in 2022. This growth was driven overwhelmingly by growth in net migration inflows from other regions. The same is true for second and third placegetters, Gladstone and Murray Bridge, with overall growth in net internal migration coming from other regions.

In fourth place is Glenn Innes, where the growth in net internal migration was driven a little more evenly between movers from both capitals and regions.

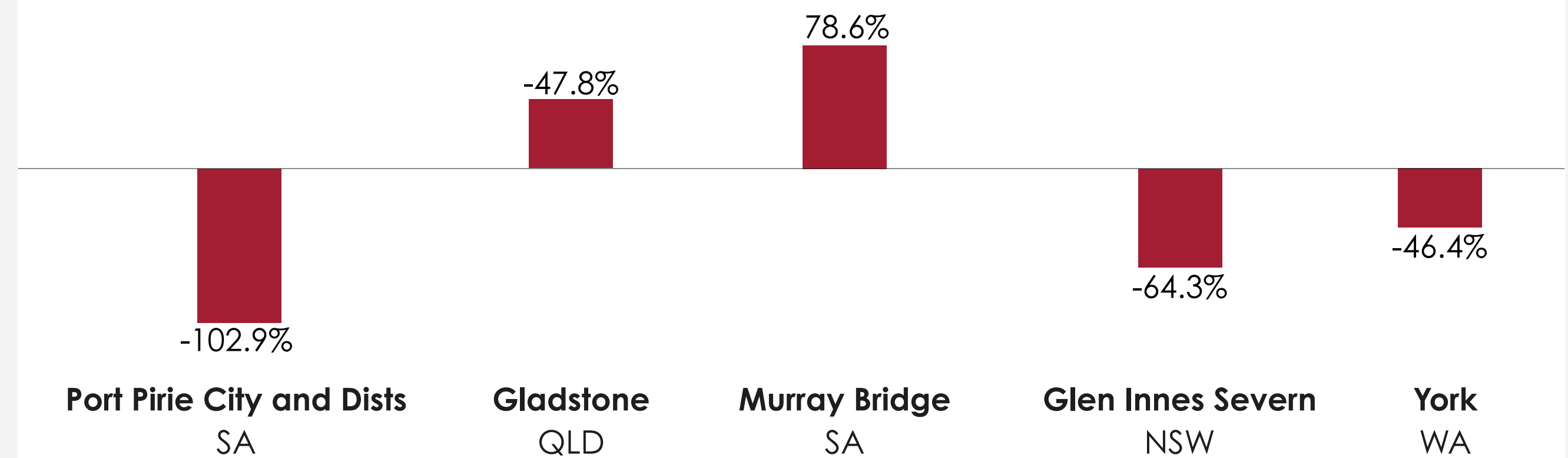
York – less than 100 kilometres from Perth – is the clear exception to the overall pattern of regionally-driven growth in net internal migration. The growth to this LGA was driven solely by growth in net migration inflows from capitals, while net inflows from other regions to this LGA in 2022 were smaller than in 2021.

See p18, Note on methodology: ranking the Top 5s. Significant outlier LGAs have not been ranked. For an LGA to be included in the rankings it must have met key thresholds in net internal migration in both 2022 and 2021. These thresholds are to designed to filter out significant outlier results typically associated with changes in small numbers. Townsville for example, is absent from this list – it experienced a significantly larger net internal migration inflow in 2022 compared with 2021, when it experienced a net outflow of internal migration, resulting in a significant outlier growth rate.

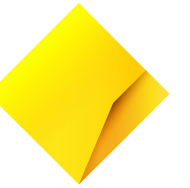
Top Five LGAs by annual growth in **total net internal migration** inflows  
CY 2022 vs CY 2021, % change



Quarterly change in **total net internal migration** to Top Five LGAs  
Dec qtr 2022 vs Sep qtr 2022, % change



# Most attractive places for capital-city people



## Top Five LGAs: largest net inflows from capitals

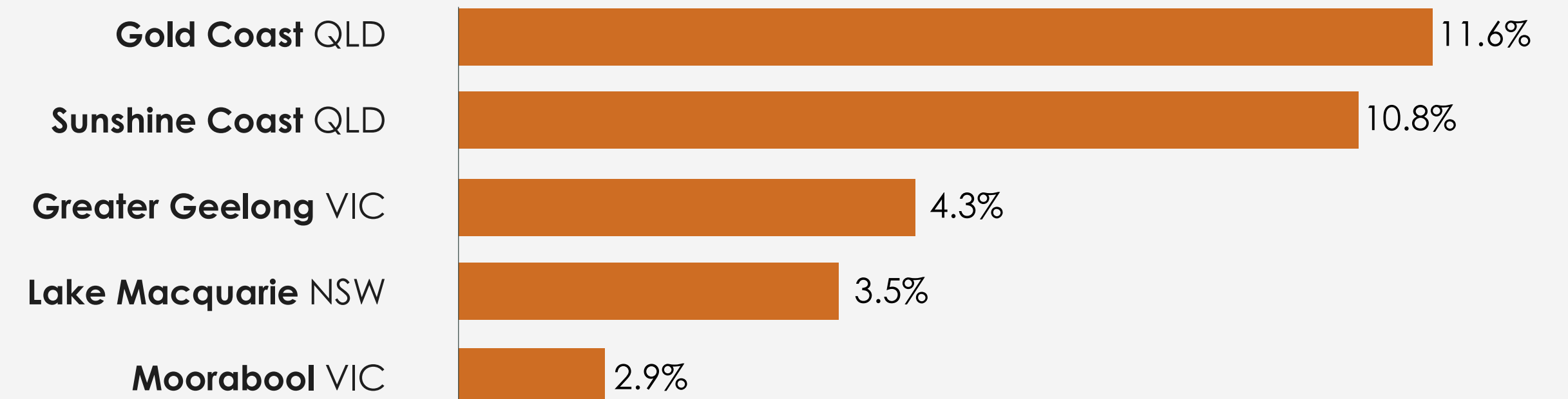
The LGAs gaining the most people from capitals are those major centres along the east coast and proximate to those capitals. In 2022, the Gold Coast topped the list, followed by the Sunshine Coast, Greater Geelong and Lake Macquarie to account for a respective 11.6, 10.8, 4.3 and 3.5 per cent of net capital to region migration.

Previous RMI publications have focused on the one-way migration flows from capitals to regions. In this publication, migration flows in the other direction (i.e. from regional LGAs back to the capitals) are taken into account, by ranking the **net** migration inflows from capitals. As a result, Wollongong (Top Five in previous publications) falls out of this Top Five list, due to its significant migration outflows back to capitals.

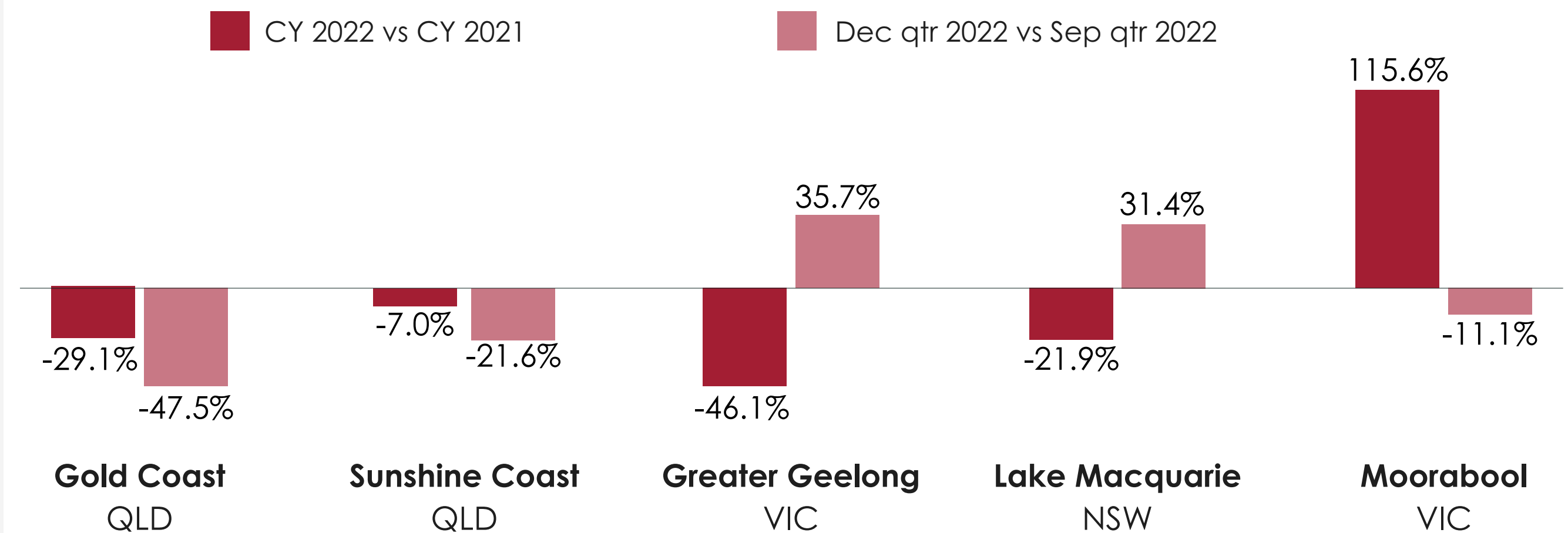
Meanwhile Moorabool – the sole inland LGA among the Top Five – joins this distinguished list, taking out fifth place.

While these LGAs experienced the largest volume of net migration inflows from capitals in 2022 (among all regional LGAs), these flows were generally lower than 2021. Moorabool, was the exception, however, with net migration inflows from capitals in 2022 more than double those of 2021.

Top Five LGAs by share of **net capital-regional migration**  
CY 2022

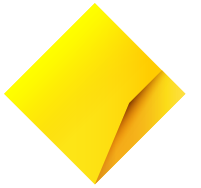


Quarterly and annual change in **net capital-regional migration**  
inflows to Top Five LGAs





# Increasingly attractive places for capital-city people



## Top Five LGAs: greatest growth in net inflows from capitals

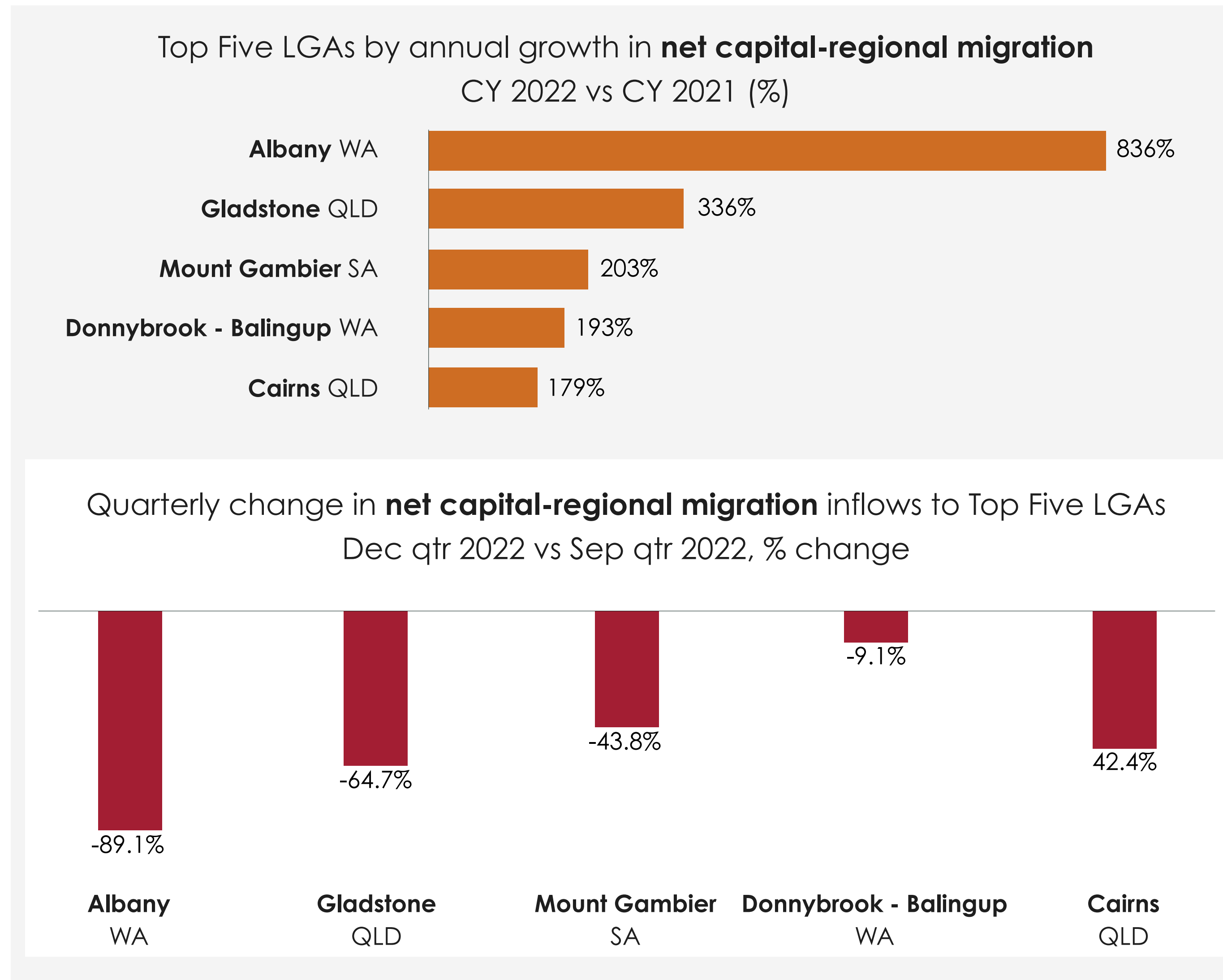
The regional LGAs experiencing the greatest growth in net migration inflows from capitals are spread across the country and notably far from those key east coast capitals.

Albany in Western Australia topped the list. From a low base, it saw a near tenfold increase in net migration inflows from capitals in 2022, compared with 2021. Meanwhile, Gladstone in Queensland experienced a four-fold increase in its net migration inflows from capitals.

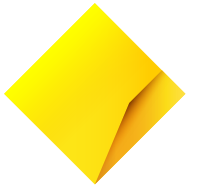
Rounding out this Top Five is Mount Gambier in South Australia, Donnybrook-Balingup in WA and Cairns in Queensland. Each of these LGAs' net migration inflows from capitals in 2022 was around three times higher than in 2021.

These strong annual growth rates were despite a drop-off in inflows for the Top Five in the December 2022 quarter, with Albany recording the biggest quarterly decline in net migration inflows from capitals, down by 89.1 per cent.

See p18, Note on methodology: ranking the Top 5s. Significant outlier LGAs have not been ranked. For an LGA to be included in the rankings it must have met key thresholds in net internal migration 2022 and net migration from capitals in 2021. These thresholds are designed to filter out significant outlier results typically associated with changes in small numbers. Whyalla for example, is absent from this list – it experienced a significantly larger net migration inflow from capitals in 2022 compared with 2021, but off a very low base in 2021 resulting in a significant outlier growth rate.



# Most attractive places for regional people



## Top Five LGAs: largest net inflows from regions

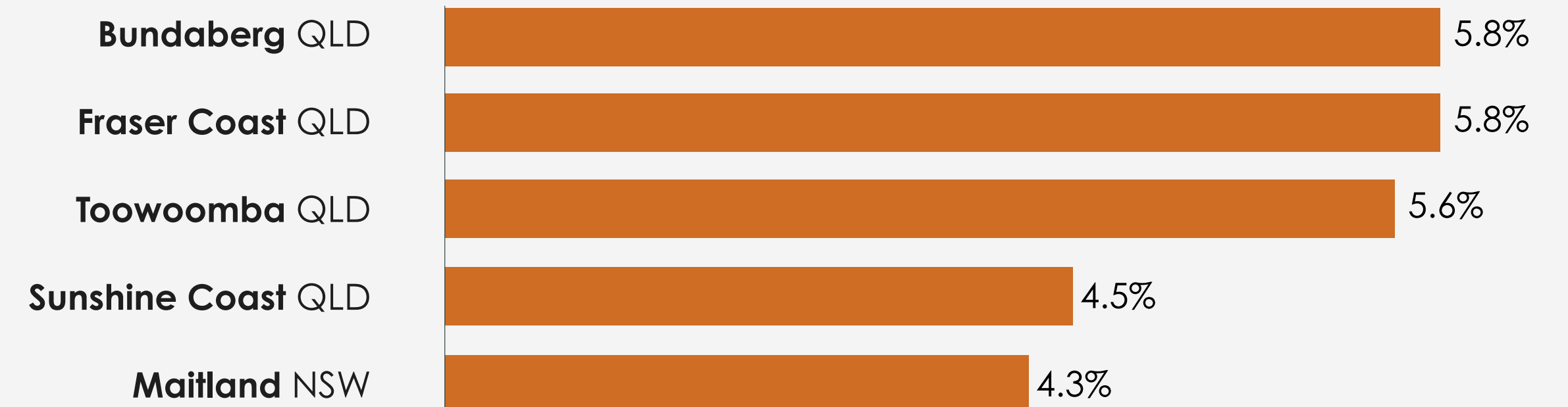
For those already living in regional Australia and making a regional move in 2022, Queensland held the most appeal. Out of the Top Five LGAs attracting the greatest level of net regional migration inflows, four were in Queensland.

Bundaberg, Fraser Coast, Toowoomba and the Sunshine Coast were top of the list for regional movers, each accounting for around 4 to 6 per cent of total net region-to-region migration\* across the country. Maitland rounded out the Top Five with a 4.3 per cent share of total net region-to-region migration.

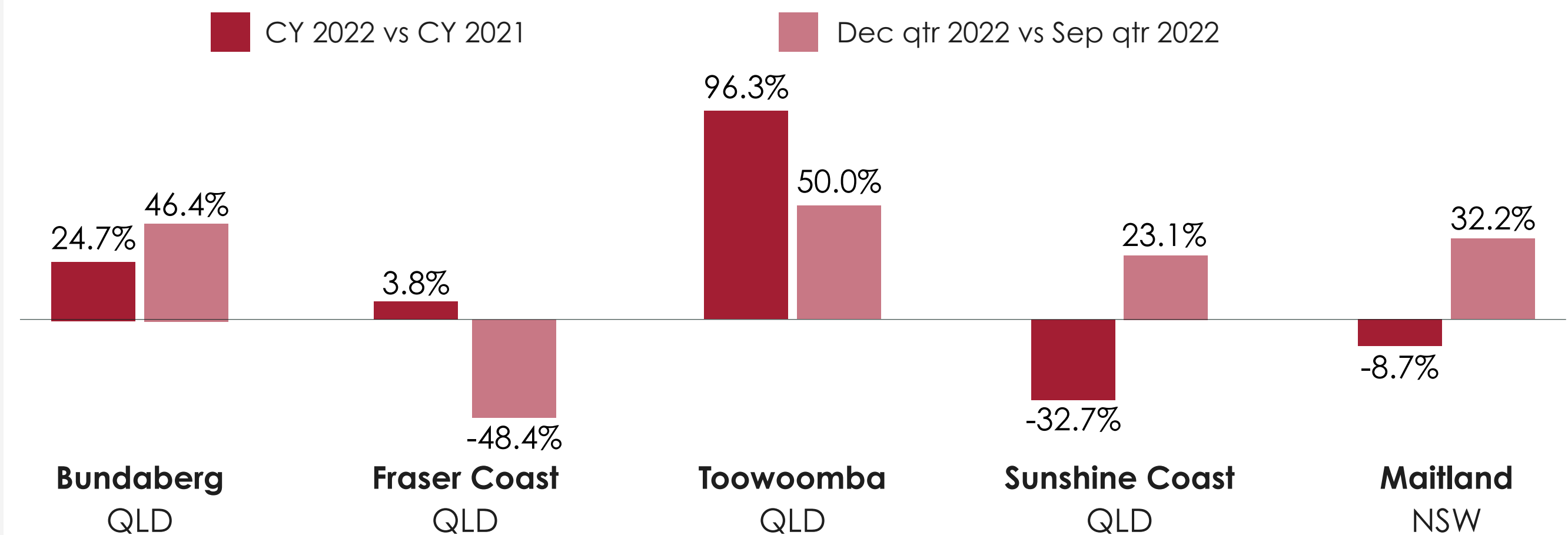
Regional Australia is going through a period of elevated mobility – regional people are on the move and this is reflected in increases in the net region-region migration inflows in three of the Top Five LGAs. Toowoomba exhibited the greatest growth in net regional inflows during 2022, up 96.3 per cent, while Bundaberg also had a strong year with a 24.7 per cent increase. The Sunshine Coast and Maitland each recorded a drop-off in net region-region inflows in 2022, despite a strong finish to the year with inflows up in the December 2022 quarter. Net inflows to the Fraser Coast remained relatively similar to 2021, despite a drop-off in the last quarter of 2022.

\*Total net region-region migration across the country is considered as the sum of net regional migration inflows to **LGAs that experienced net inflows from other regions** (some LGAs necessarily experience net outflows to other regions).

Top Five LGAs by share of **net regional-regional\*** migration  
CY 2022



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



# Increasingly attractive places for regional people

## Top Five LGAs: greatest growth in net inflows from regions

The regional LGAs experiencing the greatest growth in net migration flows from other regions are spread widely across the country.

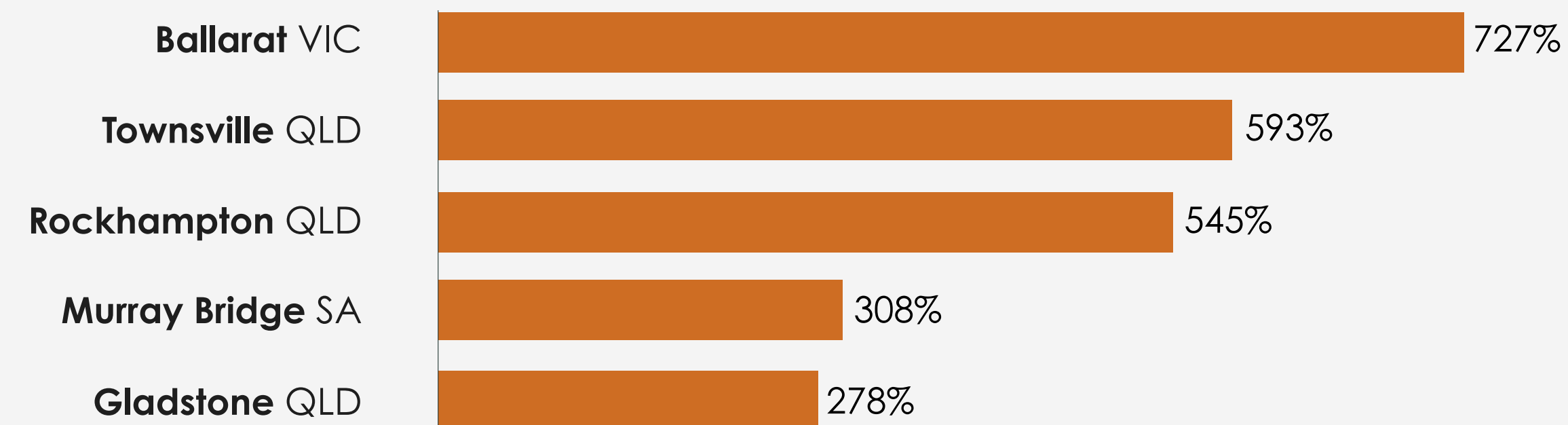
Topping the list was Ballarat in regional Victoria. From a low base, net migration inflows from other regional LGAs in 2022 were up more than 7 fold on 2021.

Net regional migration inflows to the popular Queensland regional centres of Townsville and Rockhampton were five to six times higher than 2021. Meanwhile, South Australia's Murray Bridge and Queensland's Gladstone rounded out the Top Five.

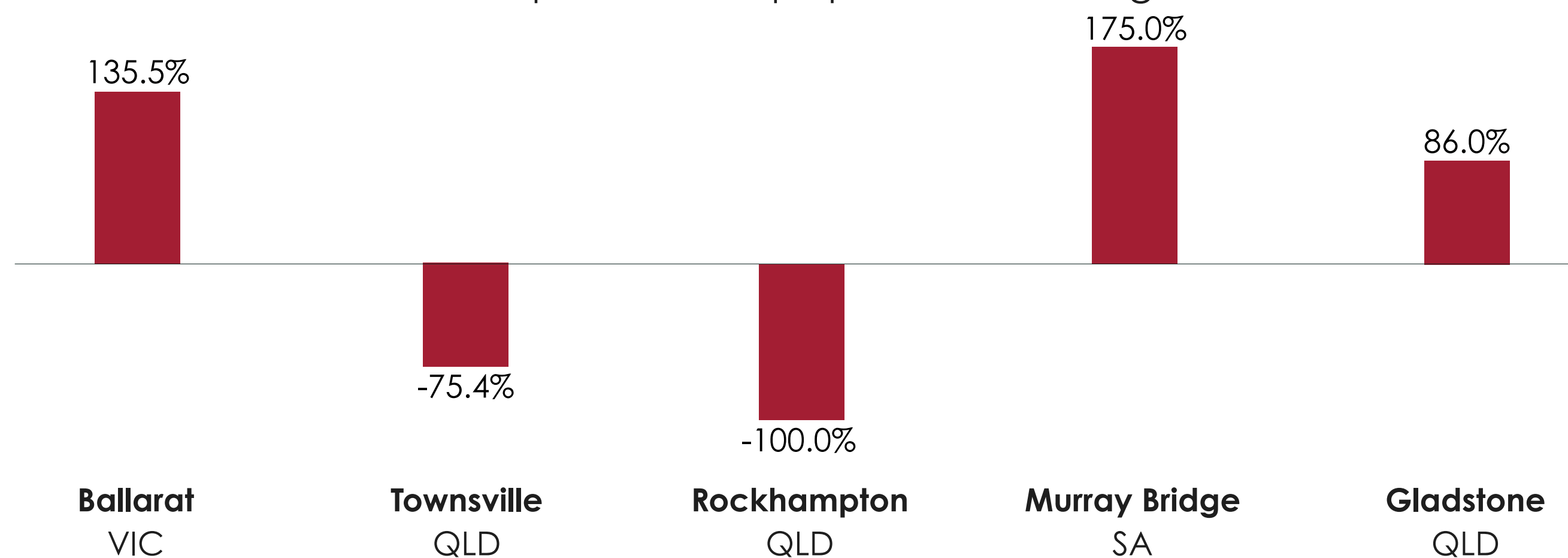
Buoyed by strong quarterly flows in the December 2022 quarter, net regional inflows into Ballarat were up 135.5 per cent for the quarter, while Murray Bridge had the highest quarterly growth rate of 175 per cent. Net inflows into Gladstone were also up in the December quarter, while Rockhampton and Townsville recorded a quarterly dip.

See p18, Note on methodology: ranking the Top 5s. Significant outlier LGAs have not been ranked. For an LGA to be included in the rankings it must have met key thresholds in net internal migration in 2022 and net migration from other regions 2021. These thresholds are to designed to filter out significant outlier results typically associated with changes in small numbers. Port Pirie, for example, is absent from this list - while it experienced a significantly larger net migration inflow from other regions in 2022 compared with 2021, these net inflows in 2021 were less than 10 people, resulting in a significant outlier growth rate.

Top Five LGAs by annual growth in **net regional-regional migration**  
CY 2022 vs CY 2021 (%)



Quarterly change in **net regional-regional migration** inflows to Top Five LGAs  
Dec qtr 2022 vs Sep qtr 2022, % change



# Inter-regional Migration

## Inter-regional migration is elevated – regional people are on the move

This Inter-Regional Migration Index looks at migration within and between regions. As highlighted throughout this report, net migration inflows from regions often represent a significant source of population growth for many LGAs.

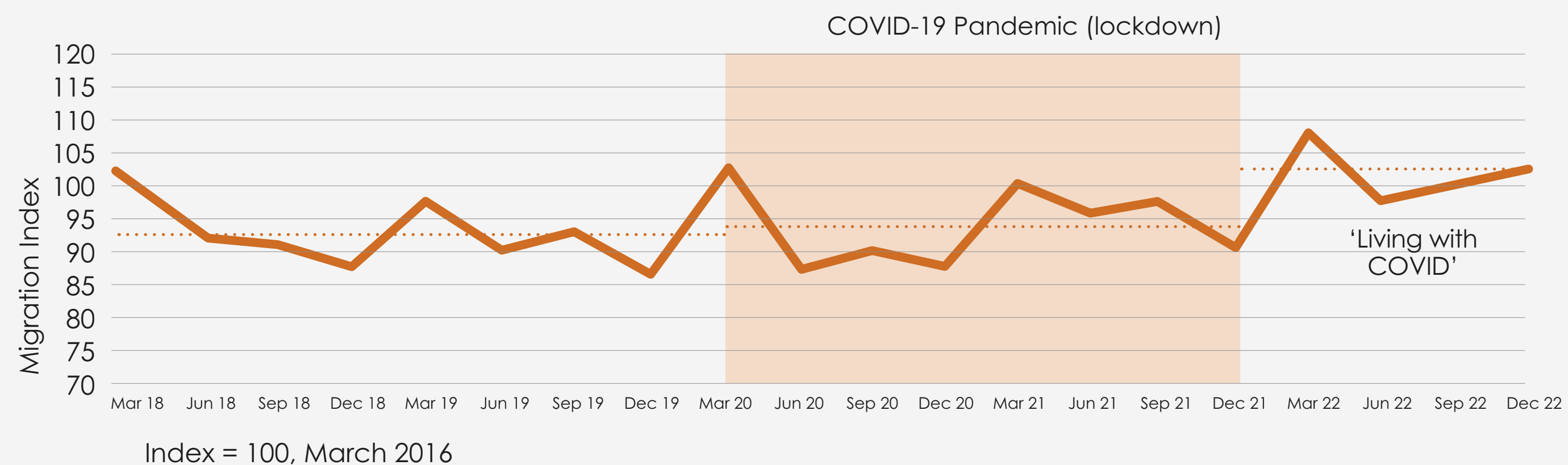
Overall, migration within and between regions accounts for the second largest share of migration among the four elements of all internal migration:

- migration within and between capital cities,
- migration within and between regions,
- capital to regional migration, and
- regional to capital migration.

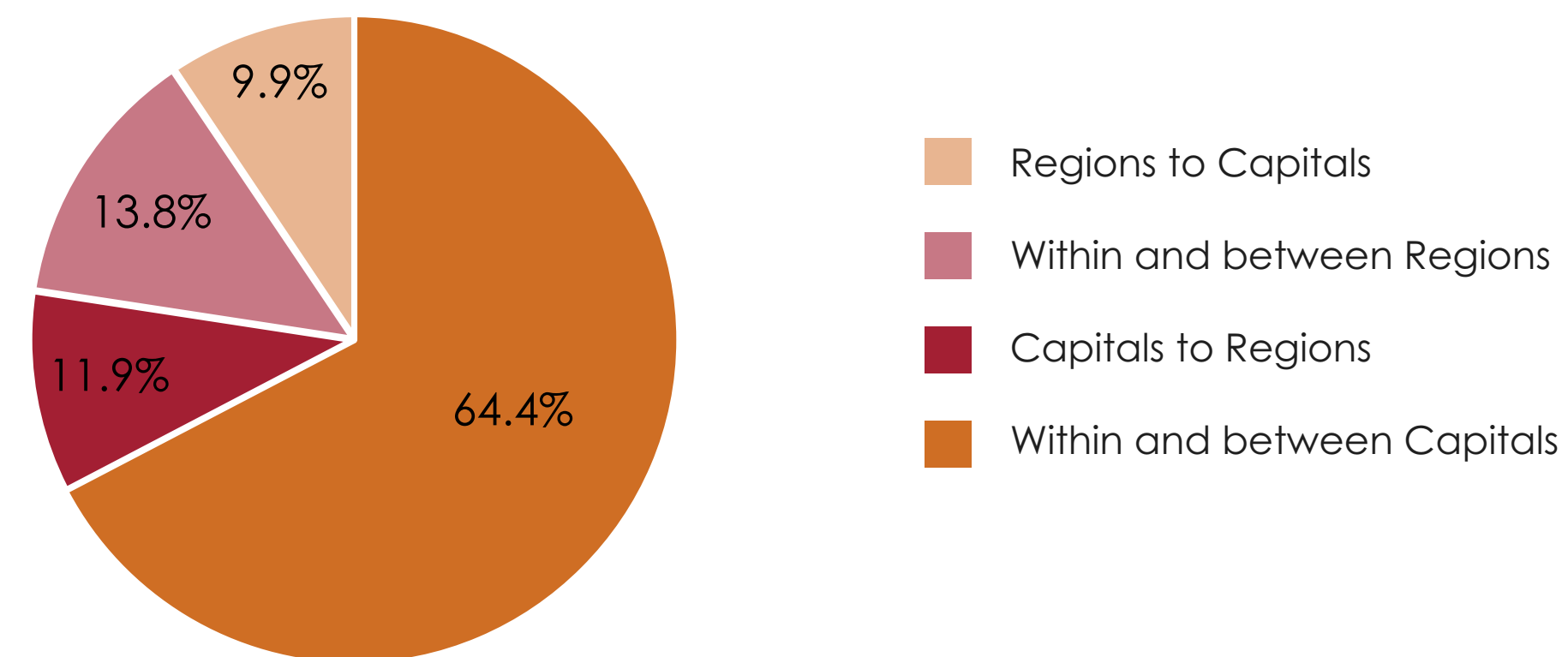
The index indicates that since Australia started living with COVID in 2022, regional mobility has lifted – with more regional people on the move. In 2022, inter-regional migration averaged 8 per cent higher than in the two years pre-pandemic. In the latest December quarter, inter-regional migration increased by some 2.2 per cent, to reach its second-highest level since the pandemic began.

A conspicuous feature in the backdrop of this increased regional mobility is the disruption to regional housing markets since the onset of the pandemic. In many (if not most) regions, available rental housing has just about dried up, driving rents significantly higher. Purchase prices have also increased significantly. And while prices are starting to decline, these declines have no way near eroded the preceding increases. These disruptions are affecting housing and rental affordability, particularly for low-income regional dwellers previously able to access and afford housing. Part of the increase in inter-regional migration is likely reflecting people searching for and relocating to other places where housing is more available and affordable.

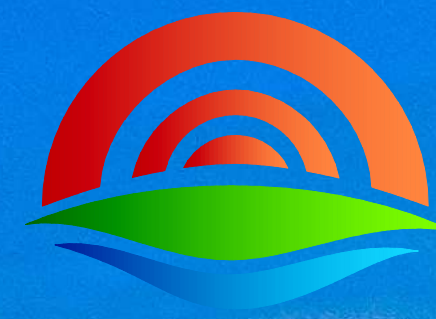
### Inter-regional Migration Index



### Internal Migration – CY 2022



# Appendix

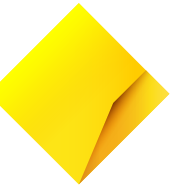


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# A1: Regional Movers Index

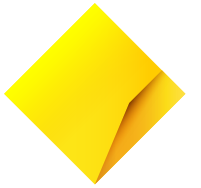
## Methodology Notes



- (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) 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 p19, Note on methodology: definitions of inter-regional, inter-capital, region-capital and capital-region migration
- (5) The Net regional migration index is calculated as movement from capital cities to regional areas 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 2022 of 50 or more people
  - Have had a base of net internal migration, net capital-region or net region-region inflows 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) 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.
- (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 March 2021 for September 2020 reference period).

# A2: All LGAs

## Share of Migration, Changes in Total Net Internal Migration



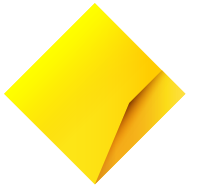
| LGA                          | State | Share of TOTAL NIM (%) | Share of NET C2R Migration (%) | Share* of NET R2R Migration (%) | Growth in TOTAL NIM CY 2022 vs CY2021 (%) |
|------------------------------|-------|------------------------|--------------------------------|---------------------------------|---|
| Sunshine Coast               | QLD   | 12%                    | 11%                            | 5%                              | -12%                                      |
| Gold Coast                   | QLD   | 11%                    | 12%                            | -1%                             | -40%                                      |
| Greater Geelong              | VIC   | 5%                     | 4%                             | 2%                              | -19%                                      |
| Fraser Coast                 | QLD   | 4%                     | 2%                             | 6%                              | 3%  |
| Bundaberg                    | QLD   | 3%                     | 1%                             | 6%                              | 31%                                       |
| Maitland                     | NSW   | 3%                     | 1%                             | 4%                              | -12%                                      |
| Toowoomba                    | QLD   | 3%                     | 1%                             | 6%                              | 23%                                       |
| Lake Macquarie               | NSW   | 3%                     | 3%                             | -2%                             | -26%                                      |
| Moorabool                    | VIC   | 3%                     | 3%                             | -1%                             | 174%                                      |
| Port Macquarie-Hastings      | NSW   | 2%                     | 2%                             | 0%                              | -27%                                      |
| Baw Baw                      | VIC   | 2%                     | 2%                             | 0%                              | -15%                                      |
| Ballarat                     | VIC   | 2%                     | 1%                             | 3%                              | -16%                                      |
| Cairns                       | QLD   | 2%                     | 1%                             | 3%                              | 61%                                       |
| Mid-Coast                    | NSW   | 2%                     | 2%                             | 0%                              | -27%                                      |
| Shellharbour                 | NSW   | 2%                     | 1%                             | 2%                              | 10%                                       |
| Gympie                       | QLD   | 2%                     | 1%                             | 3%                              | 16%                                       |
| Cessnock                     | NSW   | 2%                     | 1%                             | 1%                              | -19%                                      |
| Busselton                    | WA    | 2%                     | 1%                             | 1%                              | 19%                                       |
| Port Stephens                | NSW   | 2%                     | 1%                             | 1%                              | -26%                                      |
| Bass Coast                   | VIC   | 2%                     | 2%                             | -1%                             | -42%                                      |
| Hindmarsh                    | VIC   | 2%                     | 2%                             | -1%                             | -31%                                      |
| Queanbeyan-Palerang Regional | NSW   | 1%                     | 2%                             | -1%                             | -60%                                      |
| Gladstone                    | QLD   | 1%                     | 0%                             | 3%                              | 292%                                      |
| Mackay                       | QLD   | 1%                     | 0%                             | 3%                              | 97%                                       |

| LGA                    | State | Share of TOTAL NIM (%) | Share of NET C2R Migration (%) | Share* of NET R2R Migration (%) | Growth in TOTAL NIM CY 2022 vs CY2021 (%) |
|------------------------|-------|------------------------|--------------------------------|---------------------------------|---|
| Townsville             | QLD   | 1%                     | 0%                             | 4%                              | -   |
| Tweed                  | NSW   | 1%                     | 2%                             | -1%                             | -19%                                      |
| Shoalhaven             | NSW   | 1%                     | 2%                             | -1%                             | -56%                                      |
| Greater Bendigo        | VIC   | 1%                     | 1%                             | 1%                              | -63%                                      |
| South Burnett          | QLD   | 1%                     | 1%                             | 1%                              | 41%                                       |
| Clarence Valley        | NSW   | 1%                     | 0%                             | 2%                              | 35%                                       |
| Alexandrina            | SA    | 1%                     | 1%                             | 0%                              | 66%                                       |
| Livingstone            | QLD   | 1%                     | 0%                             | 2%                              | -3%                                       |
| Augusta-Margaret River | WA    | 1%                     | 1%                             | 1%                              | -4%                                       |
| East Gippsland         | VIC   | 1%                     | 1%                             | -1%                             | -41%                                      |
| Noosa                  | QLD   | 1%                     | 2%                             | -3%                             | -44%                                      |
| Tablelands             | QLD   | 1%                     | 0%                             | 2%                              | 142%                                      |
| Southern Downs         | QLD   | 1%                     | 1%                             | 1%                              | 83%                                       |
| Mount Gambier          | SA    | 1%                     | 1%                             | 0%                              | 46%                                       |
| Albany                 | WA    | 1%                     | 0%                             | 1%                              | 131%                                      |
| Wodonga                | VIC   | 1%                     | 0%                             | 2%                              | -22%                                      |
| Rockhampton            | QLD   | 1%                     | 0%                             | 2%                              | 122%                                      |
| Bega Valley            | NSW   | 1%                     | 0%                             | 0%                              | -32%                                      |
| Whitsunday             | QLD   | 1%                     | 0%                             | 1%                              | -30%                                      |
| Kempsey                | NSW   | 1%                     | 0%                             | 0%                              | 74%                                       |
| West Tamar             | TAS   | 1%                     | 0%                             | 1%                              | 0%  |
| Scenic Rim             | QLD   | 1%                     | 0%                             | 1%                              | -26%                                      |
| Copper Coast           | SA    | 1%                     | 0%                             | 0%                              | 16%                                       |
| Nambucca Valley        | NSW   | 1%                     | 0%                             | 0%                              | 3%  |
| Victor Harbor          | SA    | 1%                     | 0%                             | 1%                              | 5%  |

| LGA                  | State | Share of TOTAL NIM (%) | Share of NET C2R Migration (%) | Share* of NET R2R Migration (%) | Growth in TOTAL NIM CY 2022 vs CY2021 (%) |
|----------------------|-------|------------------------|--------------------------------|---------------------------------|---|
| Dardanup             | WA    | 1%                     | 0%                             | 1%                              | 151%                                      |
| Devonport            | TAS   | 1%                     | 0%                             | 1%                              | -2%                                       |
| Wellington           | VIC   | 1%                     | 1%                             | 0%                              | -28%                                      |
| Murray River         | NSW   | 1%                     | 0%                             | 0%                              | -32%                                      |
| Eurobodalla          | NSW   | 1%                     | 1%                             | -1%                             | -63%                                      |
| Yorke Peninsula      | SA    | 0%                     | 0%                             | 0%                              | 52%                                       |
| Mount Alexander      | VIC   | 0%                     | 1%                             | 0%                              | 13%                                       |
| Snowy Valleys        | NSW   | 0%                     | 1%                             | -1%                             | -18%                                      |
| Western Downs        | QLD   | 0%                     | 0%                             | 1%                              | -60%                                      |
| Surf Coast           | VIC   | 0%                     | 1%                             | -2%                             | -77%                                      |
| Barossa              | SA    | 0%                     | 0%                             | 0%                              | -11%                                      |
| Mid Murray           | SA    | 0%                     | 0%                             | 0%                              | -7%                                       |
| Bathurst Regional    | NSW   | 0%                     | 1%                             | -1%                             | -65%                                      |
| Chittering           | WA    | 0%                     | 0%                             | 0%                              | 31%                                       |
| Mid-Western Regional | NSW   | 0%                     | 1%                             | -1%                             | 116%                                      |
| Indigo               | VIC   | 0%                     | 0%                             | 0%                              | 19%                                       |
| Campaspe             | VIC   | 0%                     | 0%                             | 0%                              | -24%                                      |
| Wangaratta           | VIC   | 0%                     | 0%                             | 0%                              | -27%                                      |
| Golden Plains        | VIC   | 0%                     | 0%                             | 0%                              | -61%                                      |
| Whyalla              | SA    | 0%                     | 0%                             | 0%                              | -   |
| Central Goldfields   | VIC   | 0%                     | 0%                             | 0%                              | 142%                                      |
| Goulburn Mulwaree    | NSW   | 0%                     | 0%                             | 0%                              | -40%                                      |
| Ballina              | NSW   | 0%                     | 0%                             | 0%                              | -72%                                      |
| Latrobe              | TAS   | 0%                     | 0%                             | 0%                              | -25%                                      |
| Port Lincoln         | SA    | 0%                     | 0%                             | 0%                              | -   |

# 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 (%) | Growth in TOTAL NIM CY 2022 vs CY2021 (%) |
|---------------------------|-------|------------------------|--------------------------------|---------------------------------|---|
| Burnie                    | TAS   | 0%                     | 0%                             | 0%                              | 84%                                       |
| Yankalilla                | SA    | 0%                     | 0%                             | 0%                              | -3%                                       |
| Harvey                    | WA    | 0%                     | 0%                             | 1%                              | -7%                                       |
| Port Pirie City and Dists | SA    | 0%                     | 0%                             | 1%                              | 347%                                      |
| Queenscliffe              | VIC   | 0%                     | 0%                             | 0%                              | -20%                                      |
| Singleton                 | NSW   | 0%                     | 0%                             | 0%                              | -14%                                      |
| South Gippsland           | VIC   | 0%                     | 1%                             | -1%                             | -63%                                      |
| Hilltops                  | NSW   | 0%                     | 0%                             | 0%                              | 61%                                       |
| Murray Bridge             | SA    | 0%                     | 0%                             | 1%                              | 245%                                      |
| Benalla                   | VIC   | 0%                     | 0%                             | 0%                              | -37%                                      |
| Denmark                   | WA    | 0%                     | 0%                             | 0%                              | 24%                                       |
| Loxton Waikerie           | SA    | 0%                     | 0%                             | 0%                              | -22%                                      |
| Richmond Valley           | NSW   | 0%                     | 0%                             | 1%                              | -55%                                      |
| Moira                     | VIC   | 0%                     | 0%                             | 0%                              | -58%                                      |
| Ceduna                    | SA    | 0%                     | 0%                             | 0%                              | -10%                                      |
| Northam                   | WA    | 0%                     | 0%                             | 0%                              | -16%                                      |
| Mansfield                 | VIC   | 0%                     | 0%                             | 0%                              | -43%                                      |

| LGA                 | State | Share of TOTAL NIM (%) | Share of NET C2R Migration (%) | Share* of NET R2R Migration (%) | Growth in TOTAL NIM CY 2022 vs CY2021 (%) |
|---------------------|-------|------------------------|--------------------------------|---------------------------------|---|
| Donnybrook-Balingup | WA    | 0%                     | 0%                             | 0%                              | 63%                                       |
| Toodyay             | WA    | 0%                     | 0%                             | 0%                              | 51%                                       |
| Kangaroo Island     | SA    | 0%                     | 0%                             | 0%                              | 33%                                       |
| Strathbogie         | VIC   | 0%                     | 0%                             | 0%                              | -10%                                      |
| Kingborough         | TAS   | 0%                     | 0%                             | 0%                              | 114%                                      |
| Port Augusta        | SA    | 0%                     | 0%                             | 0%                              | 38%                                       |
| Bunbury             | WA    | 0%                     | 0%                             | 1%                              | -54%                                      |
| Grant               | SA    | 0%                     | 0%                             | 1%                              | 2%  |
| Glen Innes Severn   | NSW   | 0%                     | 0%                             | 0%                              | 241%                                      |
| Waroona             | WA    | 0%                     | 0%                             | 0%                              | 16%                                       |
| Greater Hume Shire  | NSW   | 0%                     | 0%                             | 0%                              | -57%                                      |
| Exmouth             | WA    | 0%                     | 0%                             | 0%                              | 63%                                       |
| Greater Geraldton   | WA    | 0%                     | 0%                             | 1%                              | -   |
| Wagga Wagga         | NSW   | 0%                     | 0%                             | 0%                              | -87%                                      |
| Albury              | NSW   | 0%                     | 0%                             | -1%                             | -91%                                      |
| Bland               | NSW   | 0%                     | 0%                             | 0%                              | -   |
| York                | WA    | 0%                     | 0%                             | 0%                              | 238%                                      |

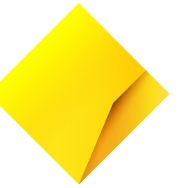
\*a negative share of Net Regional-Regional Migration indicates the LGA experienced a net outflow of people to other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of outflows from all LGAs that experienced a net outflow of people to other regions.

\* 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 p18 on the Appendix A3 for definitions and methodology.



# A3: 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 largely 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 will provide an invaluable source of information on a key driver of local population changes: net internal migration.

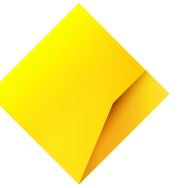
A region's population will change according to changes in:

- 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)

The RMI's reporting on net internal migration will shed 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.

# A3: 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:

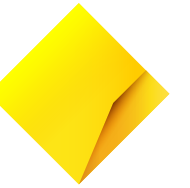
- (1) **Total Net Internal Migration** – the report identifies the top five regional local government areas receiving the largest net internal migration inflows (irrespective of whether these inflows are from capitals or other regions) during the full 2022 calendar year. It also identifies the top five 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 capital cities**. 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 2022 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 2021. Specifically:
  - a) LGAs where the net migration **inflows from either capitals or regions were 10 people or less in 2021** 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 2021** 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 2021** were not ranked among the regions experiencing the most significant growth in net migration inflows **from regions**.

\*In the 2022 calendar year there were six LGAs that experienced total net internal migration inflows of 50 or more people (and so are included in Appendix A2) - but their net inflows in the previous year were 10 people or less. The growth rates in their net internal migration have therefore not been assessed in the rankings of LGAs by total net internal migration. Those LGAs are: Greater Geraldton (with net internal migration in 2022 some 1,000 per cent higher than in 2021), Muswellbrook (+920%), Port Lincoln (+715%), Bland (+718%), Goondiwindi (+237%) and Whyalla (+143%).

# A3: 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. 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. To date, the RMI publication has 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 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 previous editions). Under this edition's new analytical framework, of all relocations:

- those within regional Australia have accounted for roughly 22 per cent;
- those from regional Australia to capitals have accounted for around 4 per cent;
- those from capitals to regional Australia have accounted for around 6 per cent, and
- those within and between capitals have accounted for around 68 per cent each quarter.

This edition of 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, this edition of the RMI 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 now account for roughly 14 per cent;
- those from regional Australia to capitals now account for around 10 per cent;
- those from capitals to regional Australia now account for around 12 per cent, and
- those within and between capitals now account for around 64 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.