

Regional Movers Index

CBA > Decision Science > CommBank.ai
June 2024 Quarter Report

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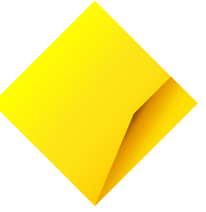


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What is Regional Movers Index?



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

The **Index** is a partnership between 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.

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 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 pp 20-22 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.
 - 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

Regional Movers Index remains elevated as love affair with regions far from over

Australia's pandemic-spurred love affair with regional Australia shows no signs of abating as city dwellers continue to flock to the regions in elevated numbers.

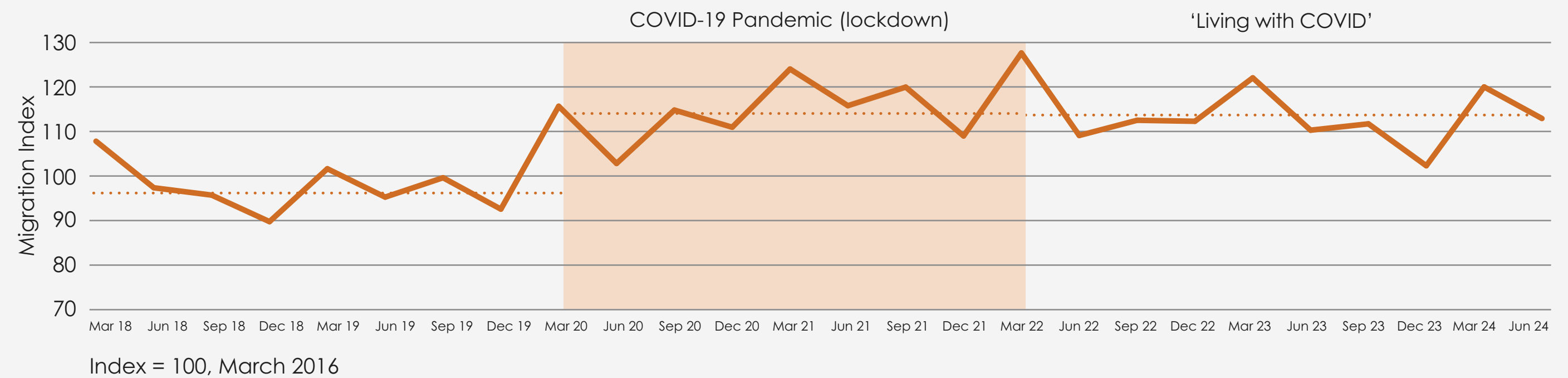
Measured by the Regional Movers Index, the population flow from capital cities to regional areas is tracking around levels reported during the height of COVID, and 16.4 per cent above the pre-pandemic average.

The RMI usually falls in the June quarter as relocations slow after their earlier-year rally. The 6.1 per cent decline in the latest quarter is the smallest decline in the June quarter to date, and well below the average June quarter decline of 9.3 per cent.

The share of those moving from the cities to the regions now stands at 11.2 per cent of all internal migration flows, compared to 8.8 per cent making the move in the opposite direction.

See p22, 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 major relocations

To

		12 months to June 2024	
		Regional Australia	Capital Cities
From	Regional Australia	12.5%	8.8%
	Capital Cities	11.2%	67.4%

Net Internal Migration to Regional Australia

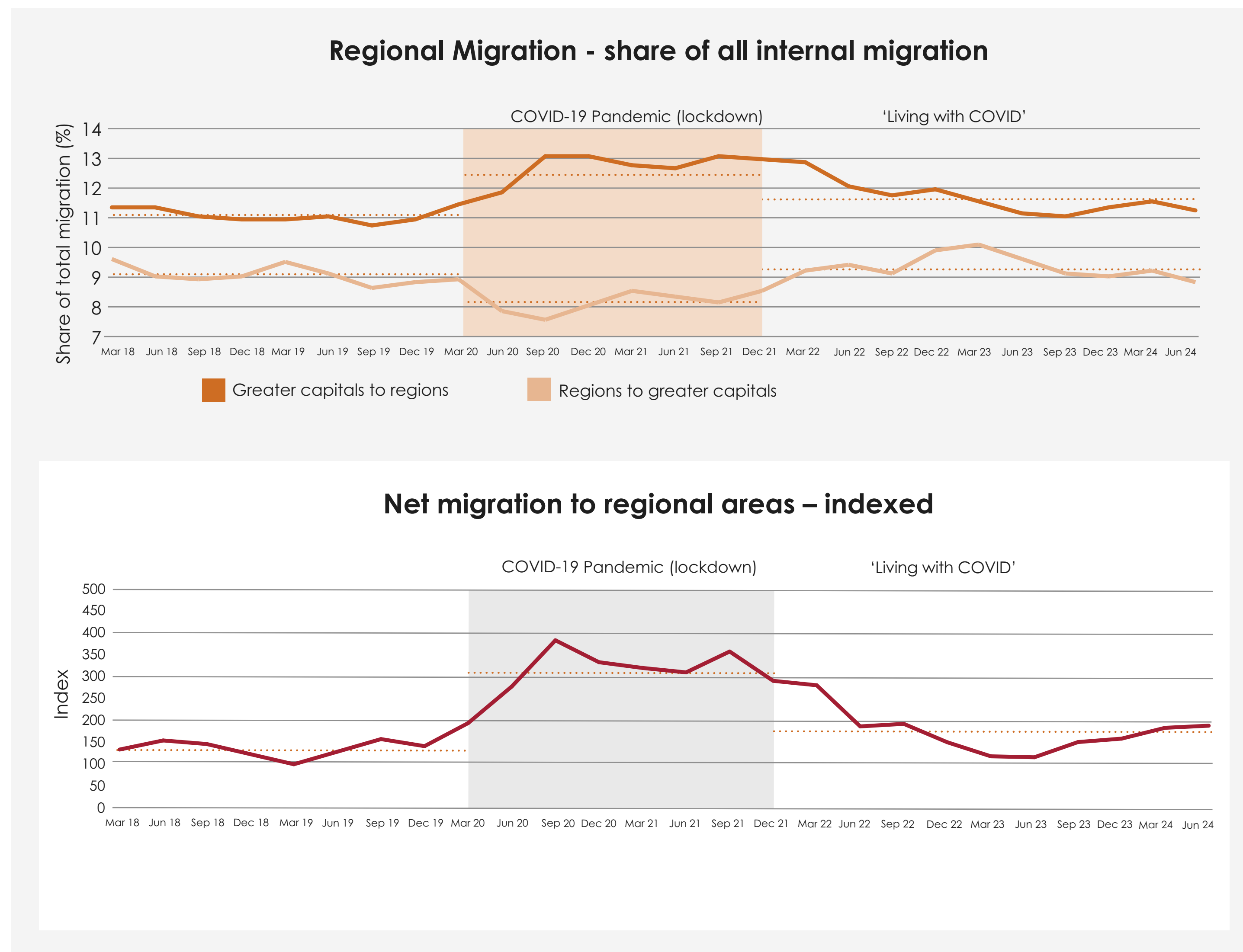
Net migration to regional areas continues to grow

The appeal of regional living remains evident, with 27.2 per cent more Australians moving from the capitals to the regions than the opposite direction, in the latest June quarter.

Defying a return to pre-COVID migration patterns, the gap between migration flows from capitals to regions, and from regions to capitals, continues to diverge. With the share of those moving from the cities to the regions now accounting for an 11.2 per cent share of all relocations, compared to 8.8 per cent moving in the opposite direction.

It should be noted that these shares of all internal migration are against a backdrop of reduced mobility this quarter, with the total number of movers down by 4.1 per cent. That said, the Australian population remains highly mobile, with the number of internal movers at its fifth highest level since March-2018.

The divergence between migration flows saw net migration to the regions edge higher this quarter, with the index now tracking 42.5 per cent above the pre-COVID average.



Migration Patterns By State

Regional NSW and Regional Victoria attract lion's share of city movers

The charts opposite show the breakdown of net migration on a state by state basis in terms of the share of net migration out of capital cities and the net migration into regional areas.

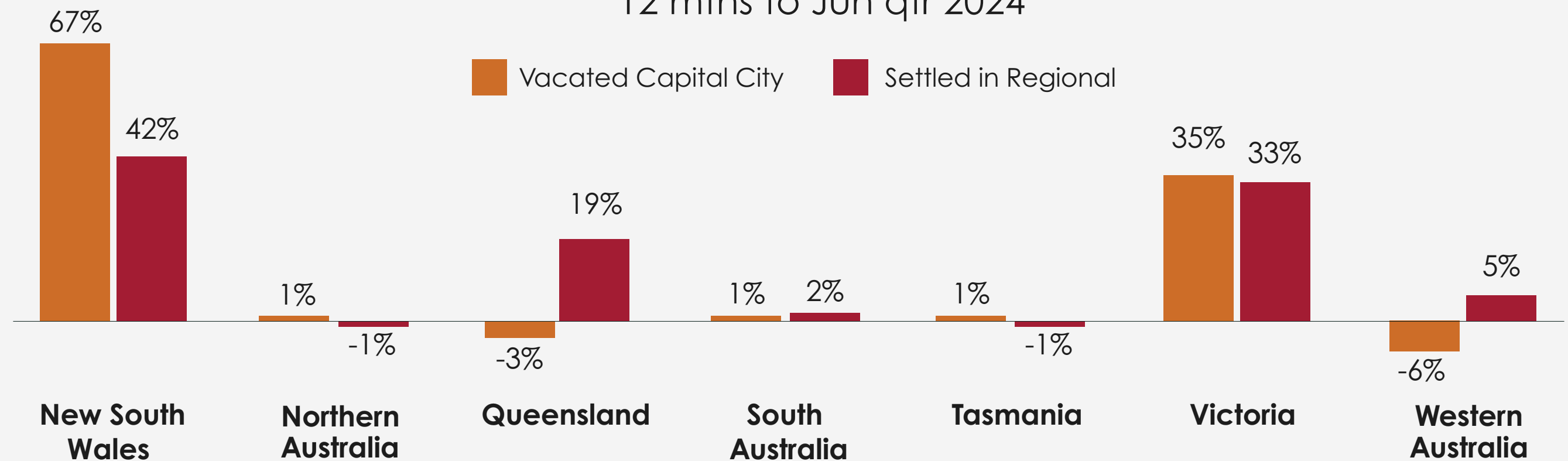
Around three quarters of city dwellers making the move to the regions have settled in New South Wales or Victoria over the last 12 months, up from around half, the year prior. New South Wales proved particularly popular amongst those making the regional move, with the premier state accounting for the largest share of all net regional inflows at 42 per cent, up from 33 per cent in the 12 months to June 2023. Regional Victoria also increased its share to account for 33 per cent of net regional inflows, up from 20 per cent a year ago.

This saw regional Queensland's share fall back to 19 per cent, after holding the largest share in the previous 12-month period at 41 per cent. While regional South Australia edged back to 2 per cent, from 7 per cent 12 months ago, and regional Western Australia retained its 5 per cent share. In contrast, regional Northern Territory and Tasmania experienced small net outflows to other states.

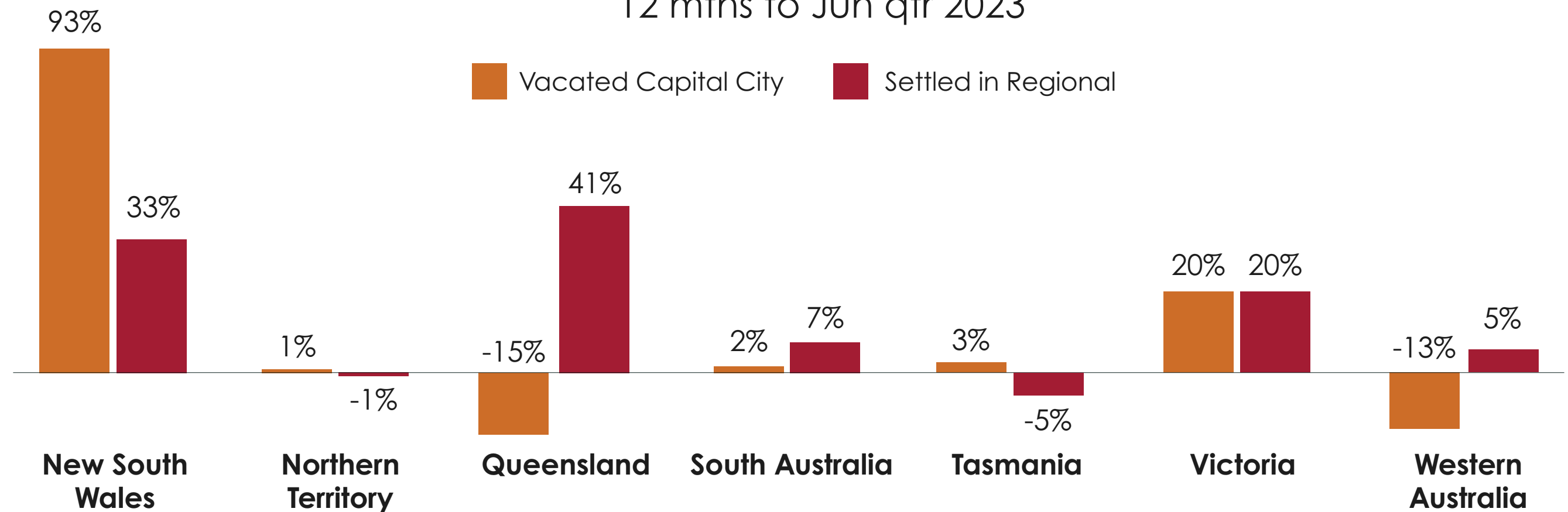
Sydney-siders and, to a lesser extent, Melburnians led the exodus out into the regions, accounting for 67 and 35 per cent of all capital city outflows, respectively. While Darwin, Adelaide, and Hobart each accounted for a 1 per cent share of net outflows.

Perth and Brisbane bucked the trend by attracting net capital city inflows of 6 and 3 per cent, albeit down from 13 and 15 per cent in the previous 12-month period to June 2023.

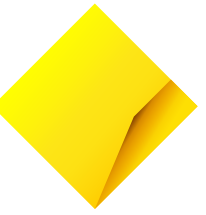
Capital City Net Outflows – Regional Area Net Inflows, State Shares
12 mths to Jun qtr 2024



Capital City Net Outflows – Regional Area Net Inflows, State Shares
12 mths to Jun qtr 2023



Regional Hotspots by Share



Top Five LGAs: the largest net internal migration inflows

This quarter saw a shake-up of the Top Five LGAs by share of net internal migration. Lake Macquarie made its debut on the list, while the Victorian LGAs of Greater Geelong and Moorabool increased their share, which saw the Gold Coast topple down the leaderboard into fifth.

The Sunshine Coast, however, retained its number one spot for the seventh consecutive quarter, with its 14.1 per cent share of all net internal migration. This came despite a recent 21.4 per cent drop-off in quarterly growth and a relatively stable annual growth rate of 1.6 per cent.

Greater Geelong edged up into second, from third previously, with its 8.1 per cent share after experiencing an upswing in quarterly growth of 35.6 per cent, and a solid annual growth rate of 17.5 per cent.

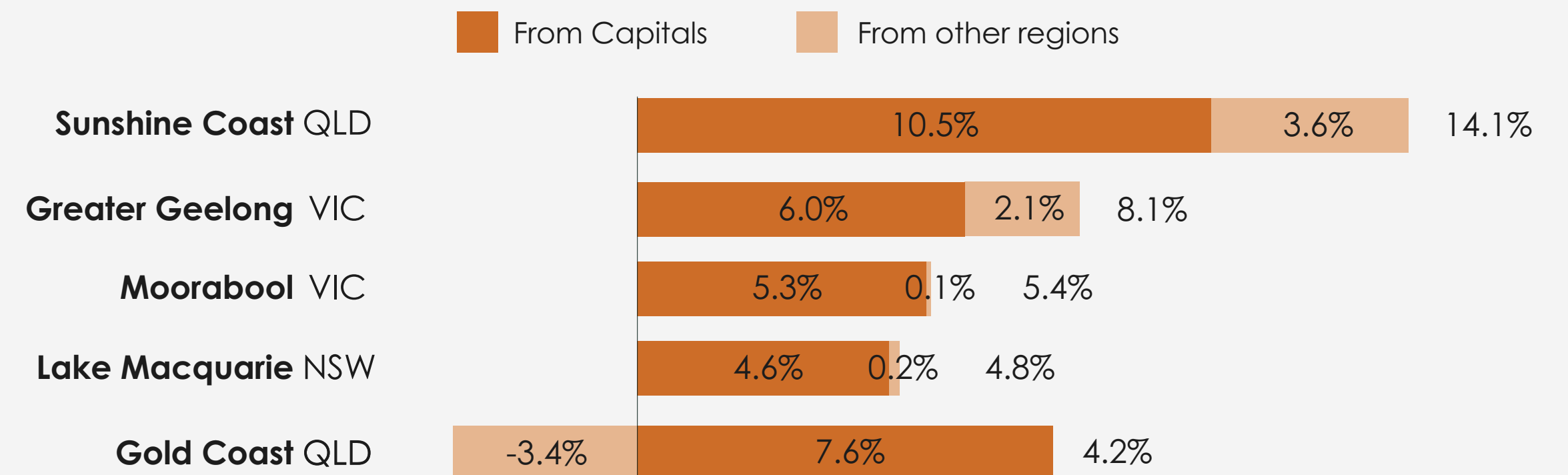
Fellow Victorian LGA, Moorabool, also moved up a spot into third with its 5.4 per cent share. Popular amongst capital movers, its growth was up on both a quarterly (20.1 per cent) and annual (23.2 per cent) basis.

New entrant to the list, Lake Macquarie, came in fourth with a 4.8 per cent share of all net internal migration, as the popular coastal destination recorded the highest annual and quarterly growth rates of the Top Five, at 60.7 and 47.5 per cent, respectively.

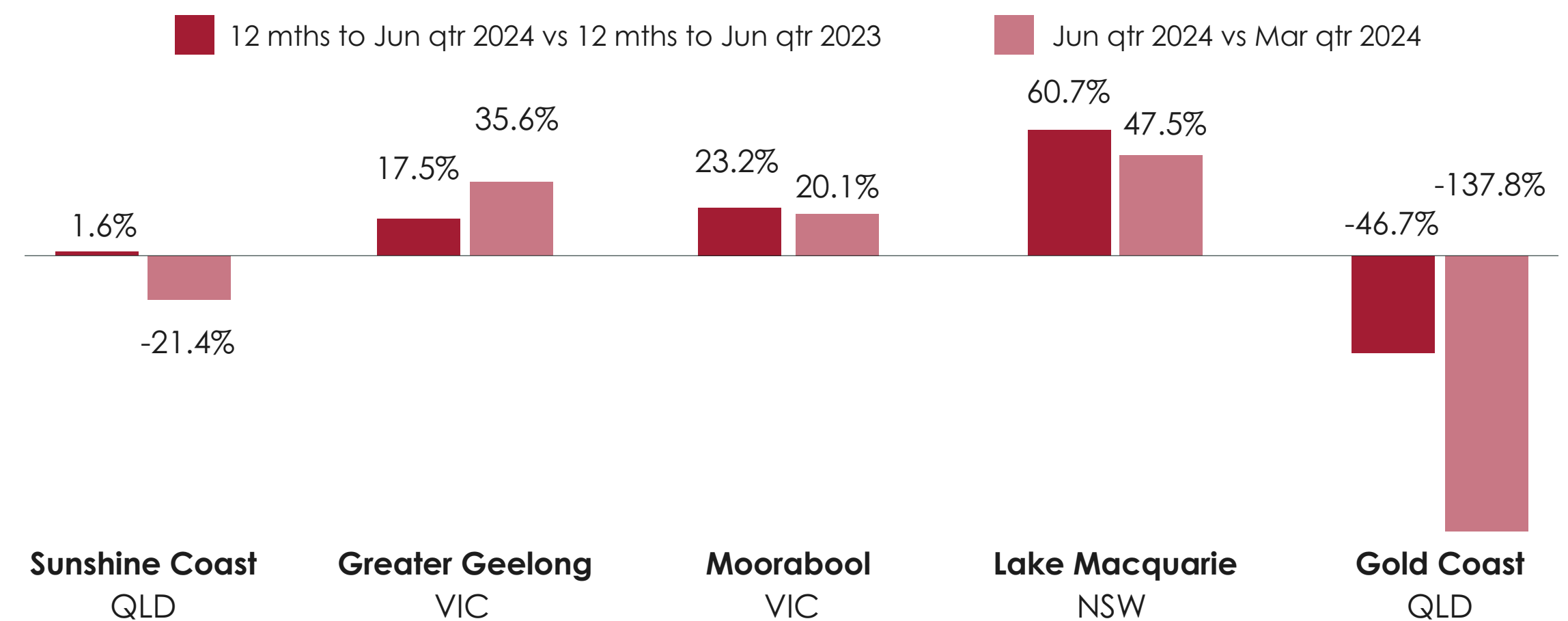
The Gold Coast rounded out the Top Five with its smallest share of net internal migration since the metric was first measured in December 2022 at 4.2 per cent on the back of an outflow of residents to other regional LGAs. This contributed to a considerable decline in quarterly growth of -137.8 per cent, while annual growth also fell by 46.7 per cent.

It should be noted that net internal migration inflows are: net flows (inflows - outflows) from capitals to regions + net flows (inflows - outflows) from region to region.

Top Five LGAs by share of total net internal migration to Regional Australia
12 mths to Jun qtr 2024



Changes in total net internal migration inflows to Top Five LGAs



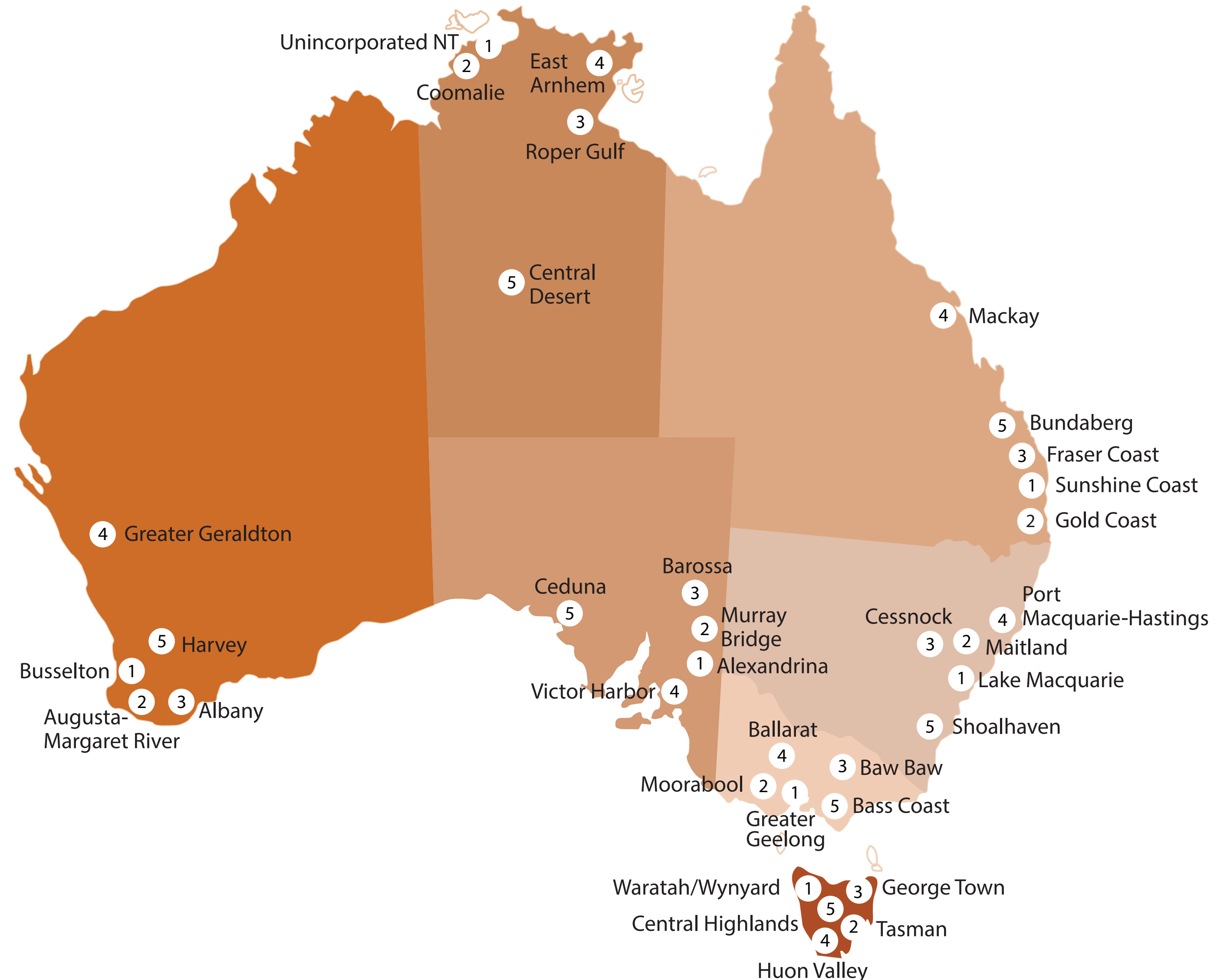
State of the Nation: Top Five by Share

This quarter, we examine which regional LGAs are attracting the largest share of internal movers on a state-by-state basis.

Calculating the share of net internal migration (i.e. the inflows from capitals to regions, and regions to internal regions, minus their respective outflows) this map highlights the Top Five regional LGAs in each state that are proving most attractive to city and regional movers, alike.

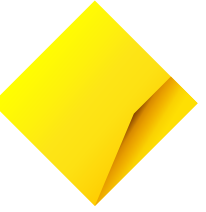
While coastal areas remain popular, particularly in Queensland, regional LGAs with robust local economies and job opportunities are also drawing a larger share of movers.

The share of net internal migration by state is detailed on page 19 of the appendix.



Unincorporated Northern Territory includes four separate sections which are not included in any of the seventeen cities, shires or council areas in the Northern Territory. It also includes rural areas, maritime and industrial areas around East Arm, resort and holiday areas, and small communities.

Regional Hotspots by Growth



Top Five LGAs: greatest growth in net internal migration inflows

The previous slide looked at regions with the largest share of movers. In this slide we look at the fastest growing regions, or growth 'hotspots' for movers, with the Surf Coast the only LGA to previously make the Top Five list. The south coast of New South Wales featured prominently in this new Top Five, measured by annual growth in net internal migration inflows, along with Victoria with the inclusion of two LGAs.

The picturesque far south coast LGA Bega Valley emerged as the fastest growing regional LGA this quarter, with a four-fold increase on the back of its popularity amongst city movers. While quarterly growth was up by 63.2 per cent to record the third highest quarterly growth rate of the Top Five.

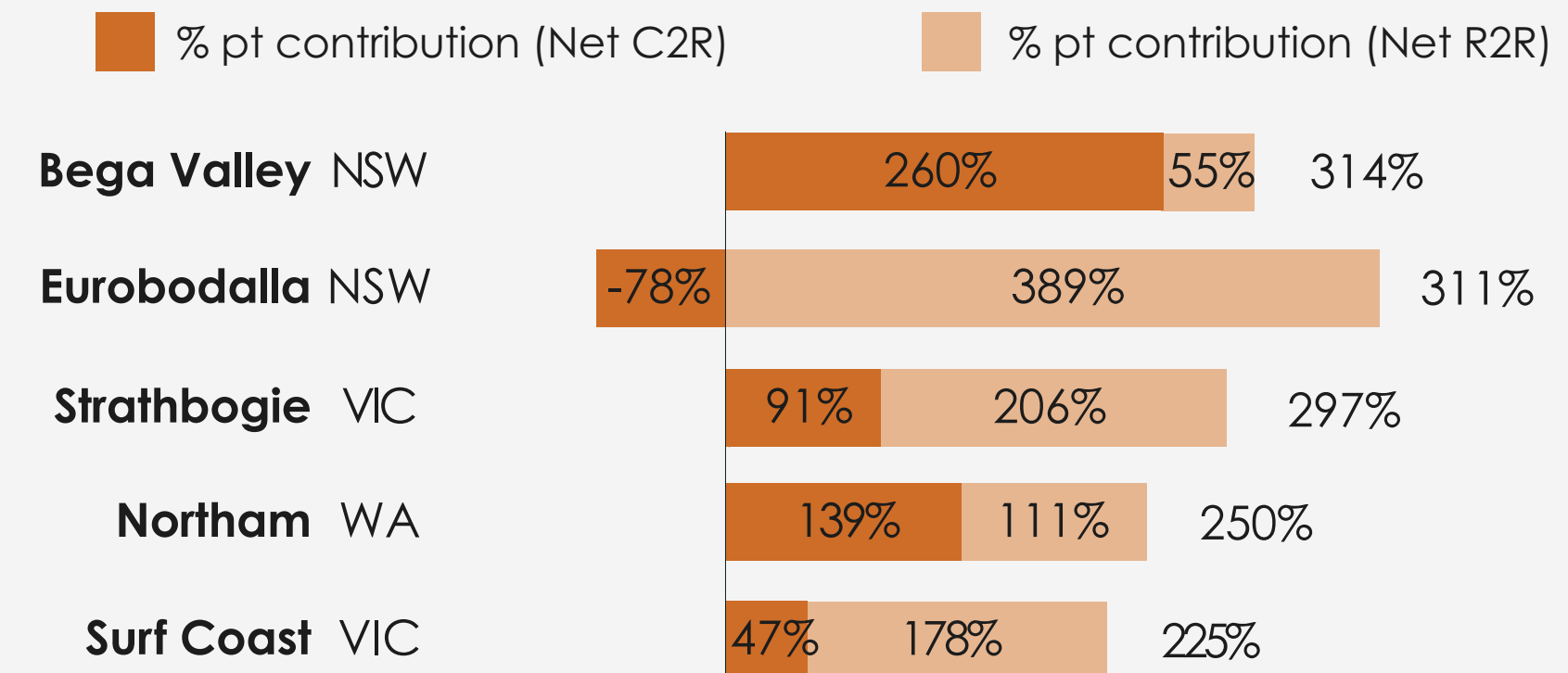
The adjoining LGA of Eurobodalla also experienced rapid growth. Unlike its south coast neighbour, regional movers were the key contributors to this growth, which also increased on a quarterly basis (87.1 per cent).

The central Victorian LGA of Strathbogie came in third position, with its four-fold annual growth rate driven by regional inflows. While on a quarterly basis, it experienced the highest growth rate of the Top Five at 140 per cent.

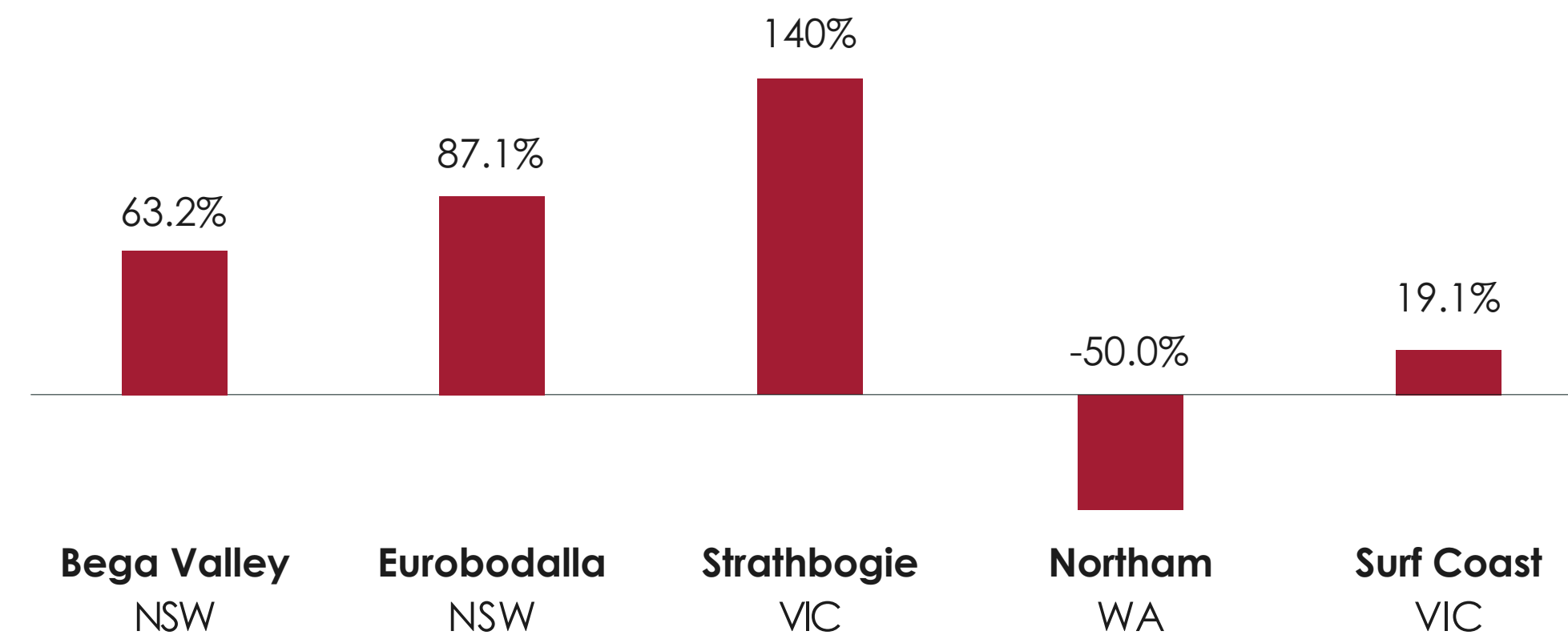
On the other side of the country, Western Australia's Northam made its debut on the list, with the LGAs growth fairly evenly distributed between capital and regional movers alike. This came despite a drop-off in growth on a quarterly basis of 50 per cent.

As the only LGA to have made the Top Five list previously, Victoria's Surf Coast recorded a three-fold increase in the 12 months to June 2024, largely on the back of regional movers. On a quarterly basis, growth in total net internal migration inflows increased by 19.1 per cent.

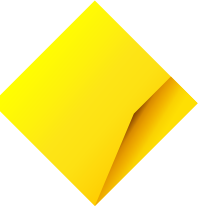
Top Five LGAs by annual growth in total net internal migration inflows 12 months to Jun qtr 2024 vs 12 months to Jun qtr 2023, % change



Quarterly change in total net internal migration to Top Five LGAs Jun qtr 2024 vs Mar qtr 2024 % Change



State of the Nation: Top Five by Growth

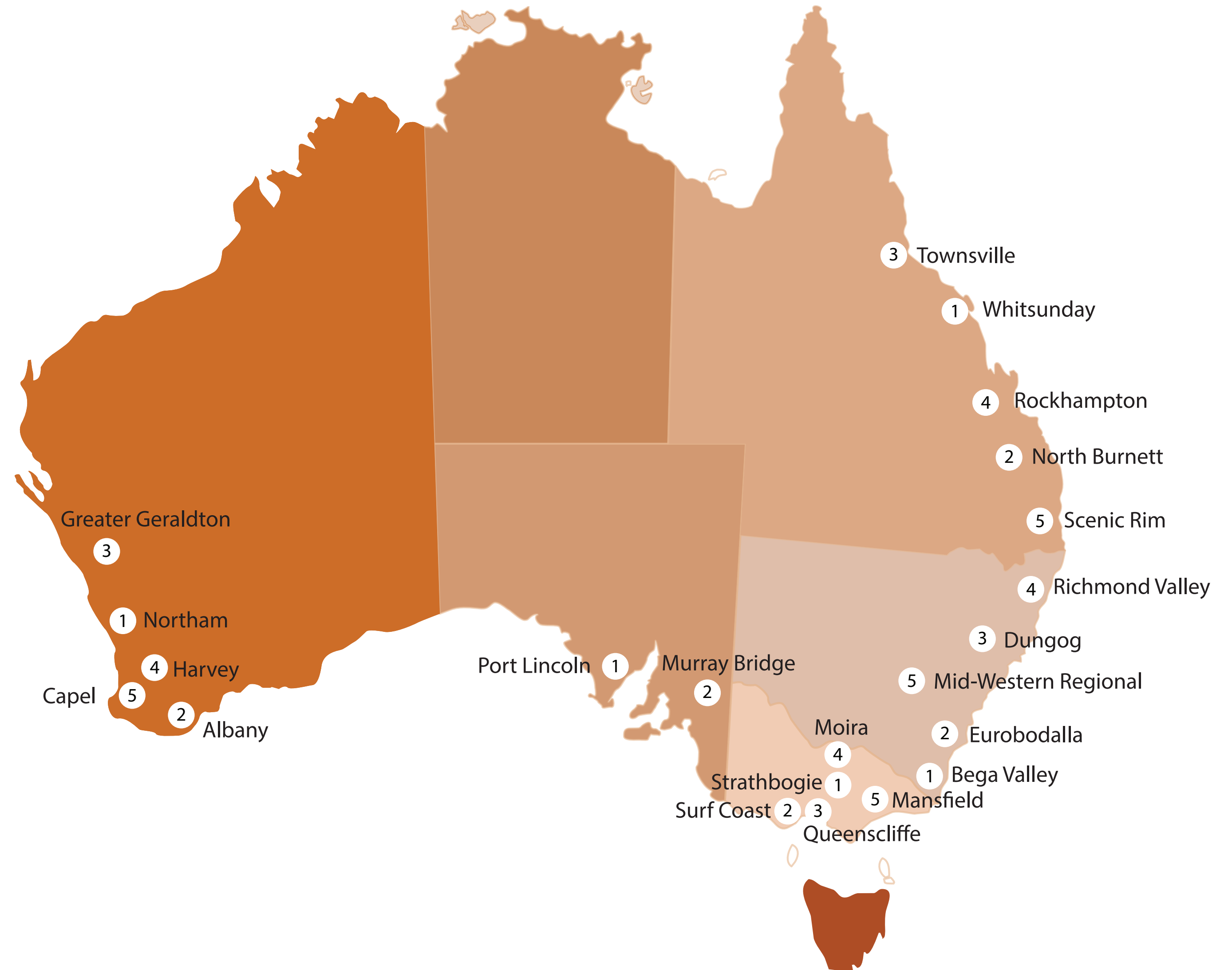


In this slide, we identify the fastest-growing regional LGAs in each state by annual growth in net internal migration.

Honing in on the Top Five LGAs in each state, the map highlights how these regional 'hotspots' tend to fall outside the commuter belt. With movers increasingly attracted to areas with thriving local economies built on industries such as mining, agriculture, manufacturing, health care, and tourism.

The availability and cost of housing are also influencing this broader movement pattern, as movers seek regions where house price growth is slowing or there is some rental availability.

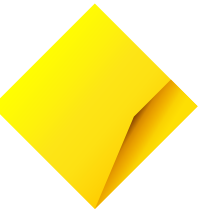
The growth rates of the Top Five LGAs by state are detailed on page 19 of the appendix.



In South Australia, two LGAs exhibited positive growth in net internal migration.

The Top Five LGAs by Growth for the Northern Territory and Tasmania have been revised as they did not meet the net internal migration criteria to be included in the RMI publication. This is to filter out significant outlier results associated with changes in small numbers. See A4 on p 21.

Most attractive places for capital-city people



Top Five LGAs: largest net inflows from capitals

Capital-city movers are continuing to opt for a sea change, as evidenced by this quarter's Top Five (by share of net capital to regional migration) being located on, or near, the coast. However, they were not ready to give up the city just yet, with the Top Five all within commuting distance of an east coast capital.

The Sunshine Coast again proved most popular amongst city-dwellers to take out the mantle for the sixth consecutive quarter with its 10.4 per cent share of net capital to regional migration. This came despite a cooling in growth on both a quarterly (-11.7 per cent) and annual (-4.3 per cent) basis.

The Gold Coast remained in second with its 7.6 per cent share in the face of a slowdown in quarterly (-78.5 per cent) and, to a lesser extent, annual growth (-7.6 per cent).

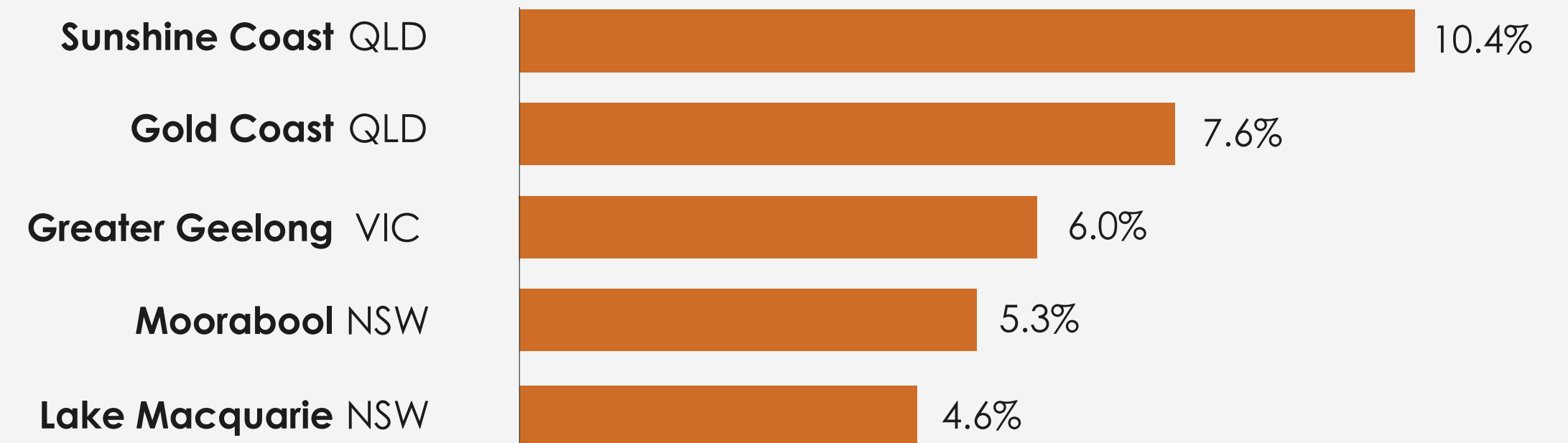
Greater Geelong jumped up into third, after sitting in fifth for the most part of a year, with its 6 per cent share of net capital to regional migration. Propelled by the strongest annual growth rate of the Top Five at 29.3 per cent, growth was also up on a quarterly basis by 5.5 per cent.

Moorabool edged down a spot into fourth to hold a 5.3 per cent share on the back of consistent annual and quarterly growth rates, in the vicinity of 19 per cent.

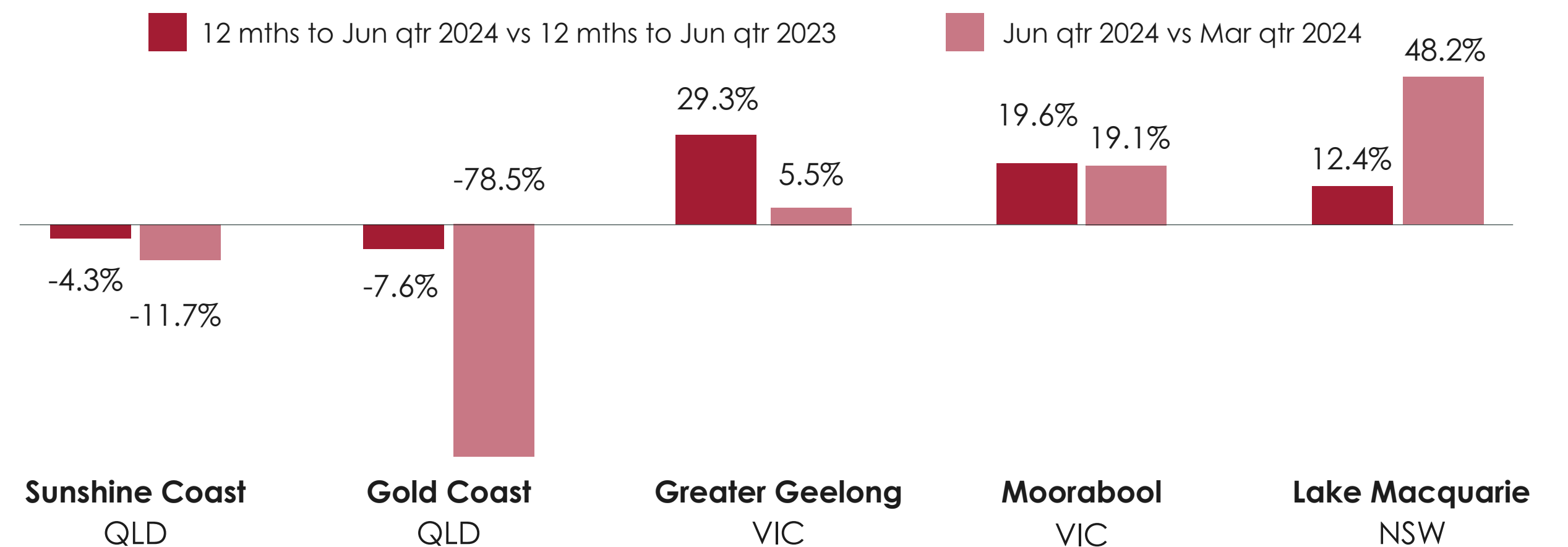
Rounding out the Top Five was Lake Macquarie with its 4.6 per cent share after recording the highest quarterly growth rate of the Top Five at 48.2 per cent.

It should be noted that the net migration inflows from capitals are: inflows from capitals minus outflows to capitals.

Top Five LGAs by share of net capital-regional migration
12 months to Jun quarter 2024



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

While regional LGAs near the east coast capitals are capturing the largest share of city dwellers, the fastest growing 'hotspots' tend to be further afield. This quarter, Western Australia emerged as a key favourite, with the western state home to three of the Top Five exhibiting the greatest growth in net inflows from the capitals.

But it was the New South Wales LGA of Bega that emerged as the fastest growing 'hotspot', with a six-fold increase in net capital to regional migration.

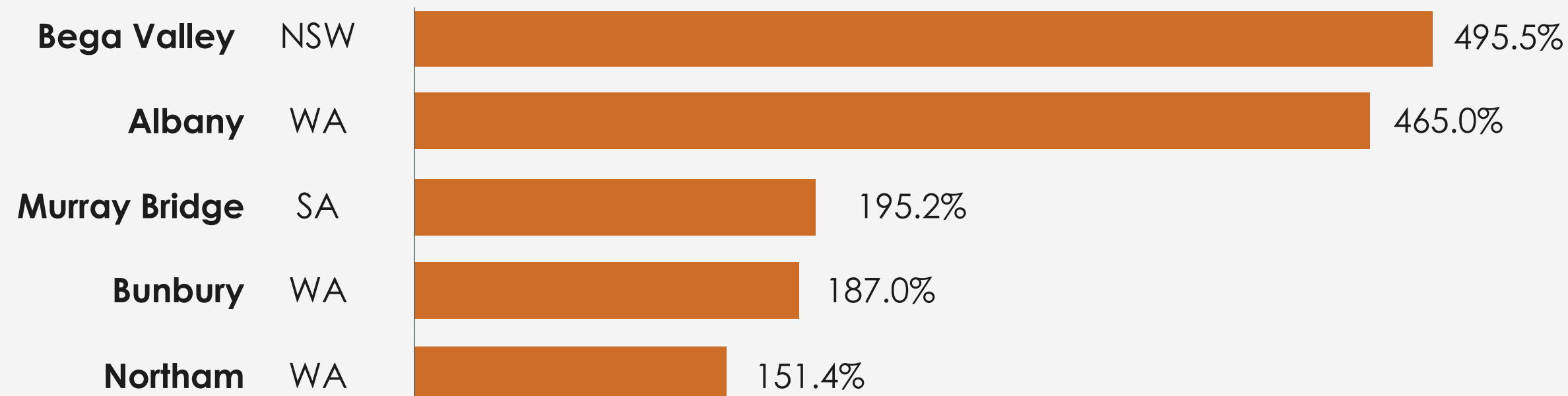
Making the list for the second consecutive quarter, the Western Australian LGA of Albany was not far behind, with its more than five-fold annual growth rate. Growth was also up on a quarterly basis at 15.8 per cent, the second highest quarterly growth rate of the Top Five.

Murray Bridge also proved popular amongst city dwellers, making its first appearance on the list in third, despite a cooling in quarterly growth of 34.8 per cent.

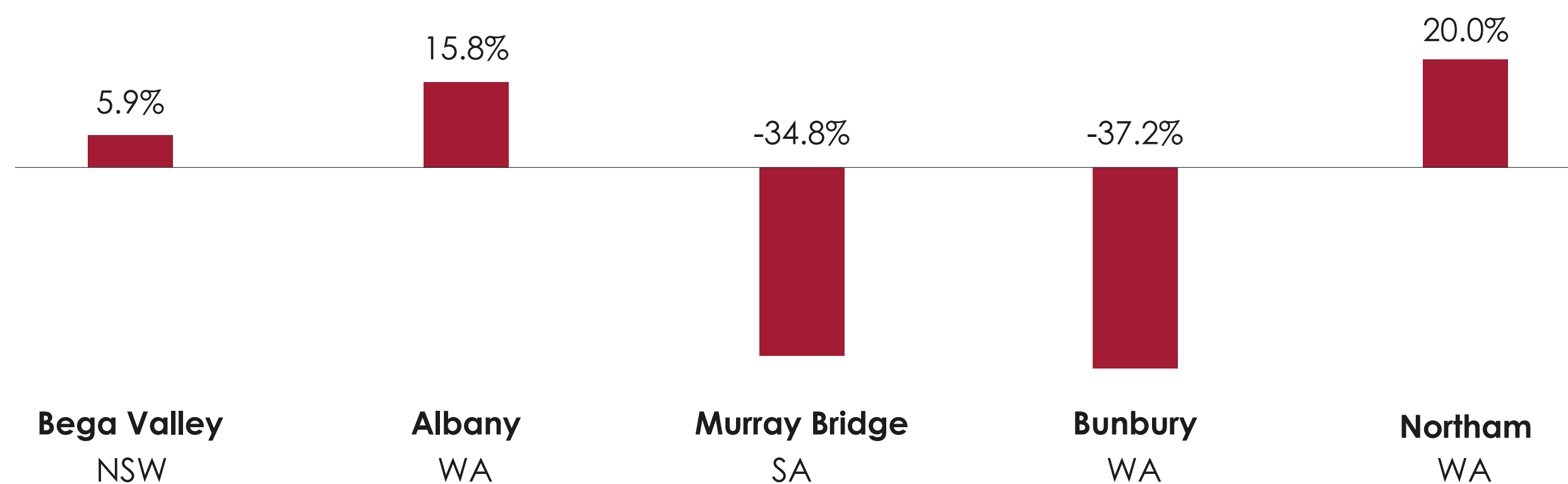
Joining Albany on the list, the Western Australian LGAs of Bunbury and Northam rounded out the list with their more than two-fold increase in net capital to regional migration. While growth was down in Bunbury on a quarterly basis (-37.2 per cent), Northam experienced the highest quarterly growth rate of the Top Five at 20 per cent.

Other notable growth 'hotspots' include Toodyay and Chittering in Western Australia, Indigo in Victoria, and the New South Wales LGAs of Maitland, Shellharbour, Port Stephens, Ballina, and Shoalhaven.

Top Five LGAs by annual growth in net capital-regional migration
12 mths to Jun qtr 2024 vs 12 mths to Jun qtr 2023, % change



Quarterly change in net capital-regional migration inflows to Top Five LGAs
Jun qtr 2024 vs Mar qtr 2024 % Change



Inter-regional Migration

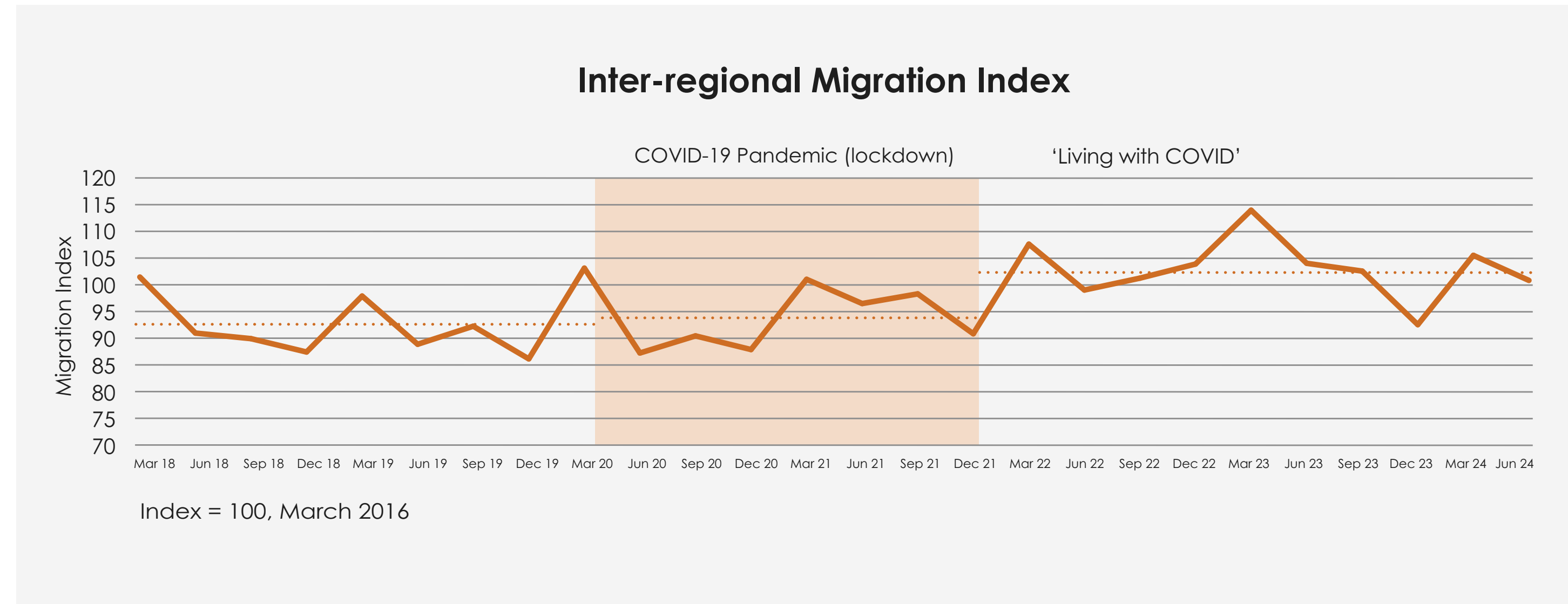
Inter-regional migration elevated with regional people also on the move

Migration within and between regions also represents a significant source of population growth for many LGAs, accounting for the second largest share of migration (after capital-to-capital migration) at 12.5 per cent.

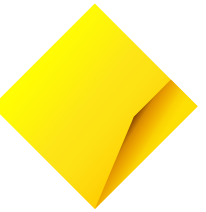
Measured by the Inter-Regional Migration Index, inter-regional migration has picked up considerably in the aftermath of COVID, with the index tracking 7 per cent above COVID levels, and 10 per cent above those reported in the two years prior.

In the latest June quarter, the Inter-Regional Migration Index edged back by 4.5 per cent to indicate the seasonality of migration flows whereby the index peaks in the earlier part of the year before dropping away in the June quarter. That said, it was the smallest fall recorded in a June quarter (which has fallen on-average by 8.9 per cent).

Although not explicit in the data, the bite of cost-of-living pressures is evident this quarter with the LGAs experiencing the fastest growth in regional movers indicating the pursuit of more available and affordable housing. Increasingly popular regional LGAs that didn't make the Top Five lists on the next two slides include Rockhampton in Queensland, Western Australia's Harvey, and Cessnock, Richmond Valley, and Shellharbour in New South Wales.



Most attractive places for regional people



Top Five LGAs: largest net inflows from regions

Similar to their capital city counterparts, regional movers also favoured the Sunshine Coast and Greater Geelong, with those regions receiving among the largest net inflows from other regional LGAs. Maitland also proved popular for regional movers, as did Queensland's Townsville and Fraser Coast.

The Sunshine Coast enticed the largest share of regional movers for the fifth consecutive quarter, with an 8.4 per cent share on the back of a solid annual growth rate of 24.1 per cent. While growth fell back on a quarterly basis by 43.5 per cent.

Maitland held onto second spot with its 5.3 per cent share. Growth was up on an annual basis, by 9.9 per cent, but showed signs of recent cooling, with quarterly growth dipping by 2.8 per cent.

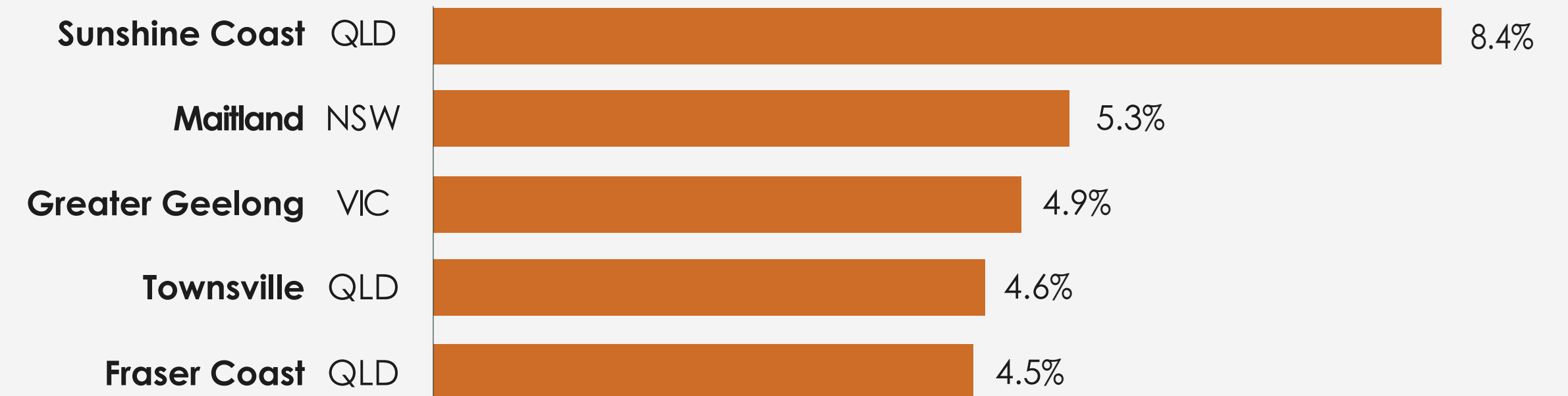
Absent from last quarter's Top Five, after being a regular for much of the last year, Greater Geelong came in third with a 4.9 per cent growth rate. Underpinned by a considerable quarterly growth rate of 285.4 per cent, it recorded a small downturn in annual growth of 7.2 per cent.

Townsville also proved popular amongst regional movers with its 4.6 per cent share, despite a recent cooldown in quarterly growth of 59.1 per cent.

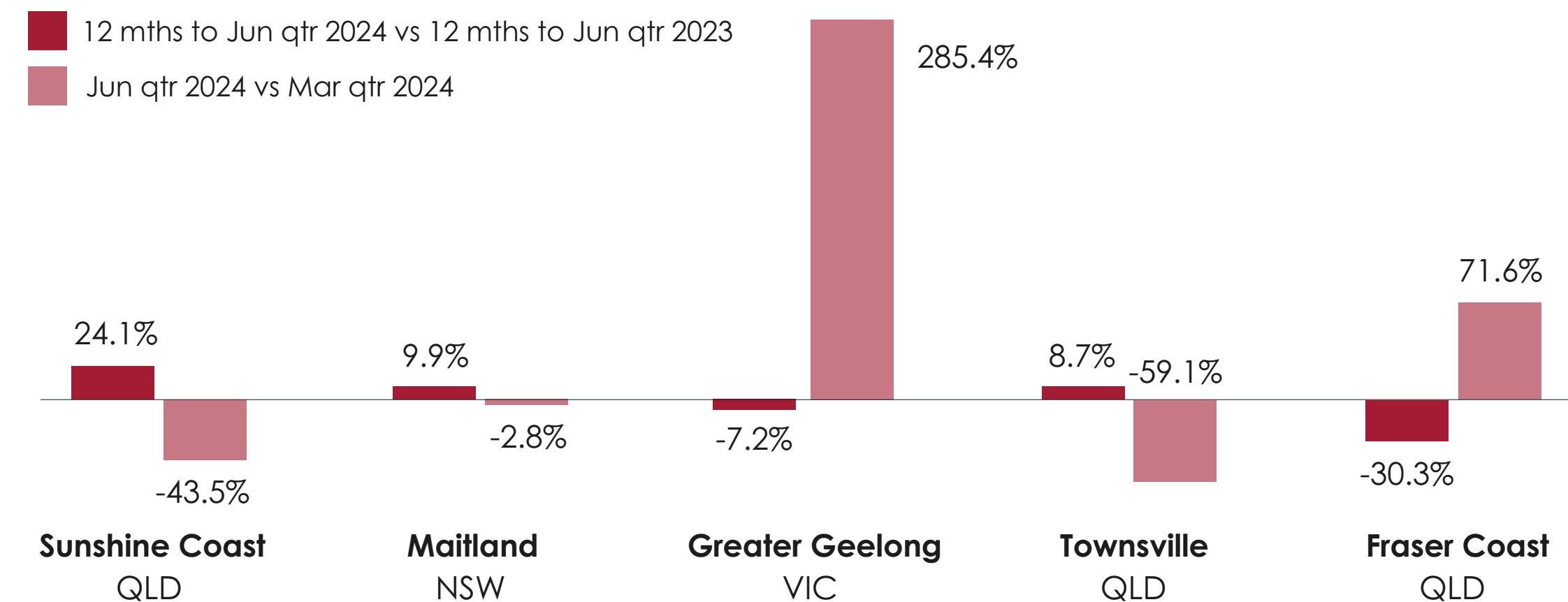
Fraser Coast came in fifth to found out the list with its 4.5 per cent share after recording the second highest quarterly growth rate of 71.6 per cent.

It should be noted that the net migration inflows from regions are: inflows from regions minus outflows to regions.

Top Five LGAs by share of net regional-regional migration
12 months to Jun qtr 2024



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 'fastest' growth in net inflows from other regions tend to be further afield, or smaller, than those receiving the largest 'share' of regional movers. New South Wales and Western Australia were particularly favoured by those making the inter-regional move by taking out all positions on the Top Five leaderboard.

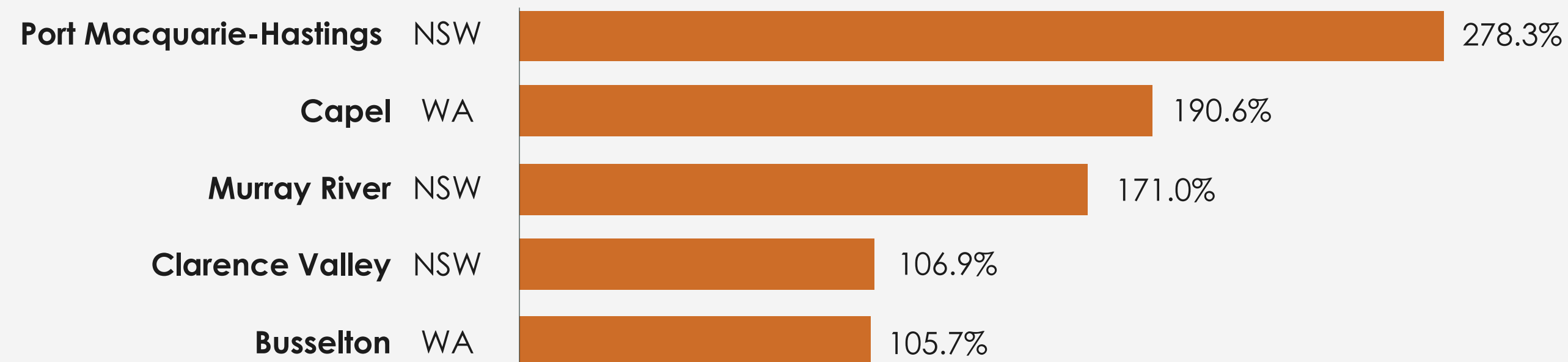
Port Macquarie-Hastings topped the list as the only regional LGA to have made the list previously to record a near four-fold increase in net region-to-region migration in the 12 months to June 2024. This came despite a cooling off in quarterly growth of -96.8 per cent.

Capel in Western Australia recorded a three-fold increase in net regional migration, while quarterly inflows fell by 33.3 per cent.

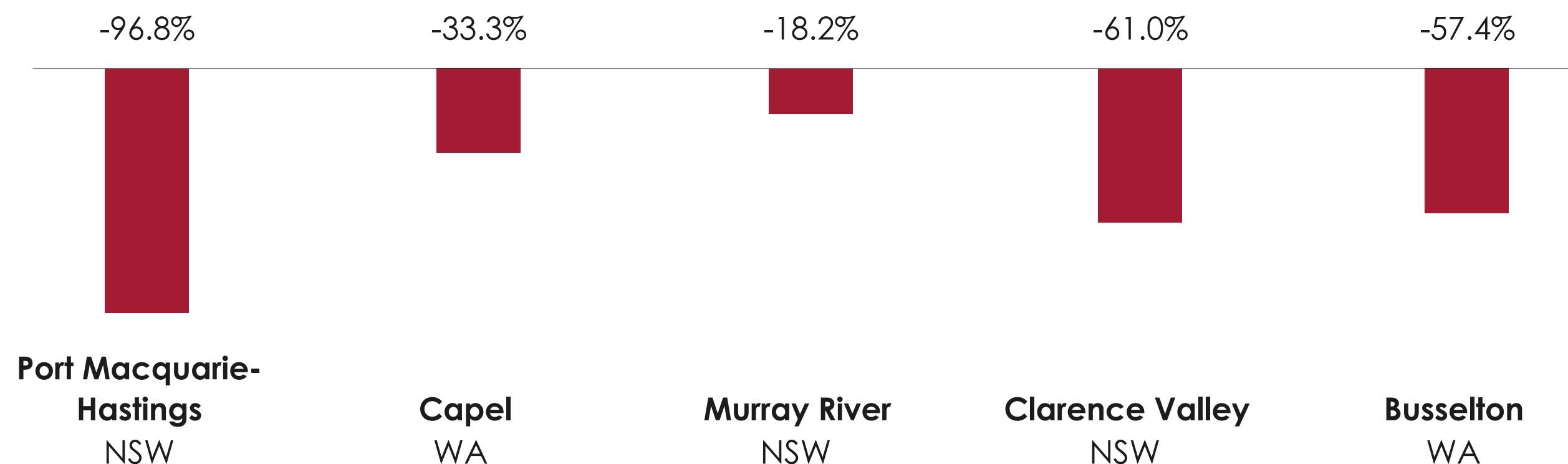
The Murray River LGA in the Riverina region of New South Wales came in third, with the agriculturally rich region recording a near three-fold increase in net region-to-region migration. While growth was down on a quarterly basis, by 18.2 per cent, this was the smallest quarterly fall amongst the Top Five.

Joining its New South Wales coastal counterpart, the Clarence Valley took out fourth on the ladder, while Western Australia's Busselton was close on its heels with a two-fold increase in net region-to-region migration. This came despite both LGAs recording a slowdown in quarterly growth in the vicinity of 61 and 57.4 per cent, respectively.

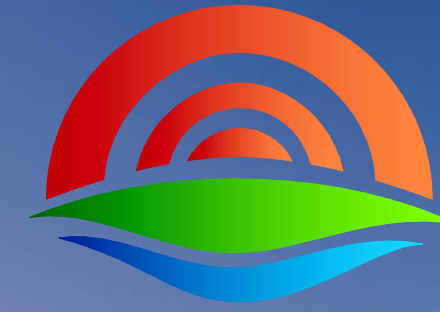
Top Five LGAs by annual growth in net regional-regional migration
12 mths to Jun qtr 2024 vs 12 mths to Jun qtr 2023, % change



Quarterly change in net regional-regional migration inflows to Top Five LGAs
Jun qtr 2024 vs Mar qtr 2024, % change



Appendix

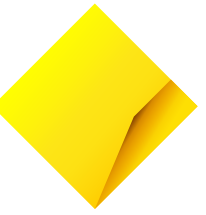


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A1: Regional Movers Index

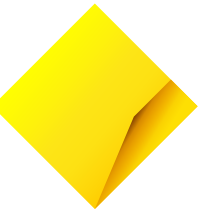
Methodology Notes



- 1 CBA-RAI Regional Movers Index is defined as movement of CBA personal customers from capital cities to regional areas (see A1.2). Index = 100, June 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 areas to regional less movement from regional areas to capital cities. Index = 100, June 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 2024 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 June 2021 for December 2020 reference period).
- 10 Chief Data and Analytics Office (CDAO) has prepared this report. CDAO is a business unit of Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945 (Bank). 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 Jun 2024 vs 12 months to Jun 2023 (%)
Sunshine Coast	QLD	14.1%	10.4%	8.4%	1.6%
Greater Geelong	VIC	8.1%	6.0%	4.9%	17.5%
Moorabool	VIC	5.4%	5.3%	0.1%	23.2%
Lake Macquarie	NSW	4.8%	4.6%	0.4%	60.7%
Gold Coast	QLD	4.2%	7.6%	-8.0%	-46.7%
Fraser Coast	QLD	4.2%	2.2%	4.5%	-23.3%
Maitland	NSW	3.5%	1.2%	5.3%	25.5%
Cessnock	NSW	3.1%	1.5%	3.8%	13.1%
Port Macquarie-Hastings	NSW	2.9%	2.4%	1.0%	26.8%
Shoalhaven	NSW	2.8%	2.9%	-0.3%	117.6%
Port Stephens	NSW	2.7%	2.1%	1.4%	108.4%
Mid-Coast	NSW	2.6%	2.5%	0.3%	38.2%
Baw Baw	VIC	2.6%	3.0%	-1.1%	-5.2%
Ballarat	VIC	2.5%	2.0%	1.1%	-0.4%
Shellharbour	NSW	2.5%	1.5%	2.4%	45.3%
Mackay	QLD	2.4%	0.5%	4.5%	9.8%
Bundaberg	QLD	2.2%	1.0%	2.7%	-41.7%
Townsville	QLD	2.2%	0.2%	4.6%	31.1%
Gympie	QLD	2.1%	0.7%	3.3%	-0.9%
Busselton	WA	2.1%	1.4%	1.6%	17.0%

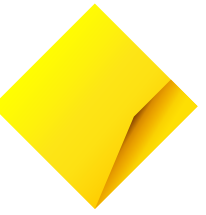
LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Jun 2024 vs 12 months to Jun 2023 (%)
Bass Coast	VIC	2.0%	2.1%	-0.2%	5.2%
Clarence Valley	NSW	1.8%	0.3%	3.7%	40.1%
Greater Bendigo	VIC	1.7%	0.9%	2.0%	-9.9%
Toowoomba	QLD	1.6%	-0.3%	4.4%	-32.9%
Surf Coast	VIC	1.4%	1.6%	-0.4%	225.0%
Gladstone	QLD	1.4%	0.1%	2.9%	3.9%
Tweed	NSW	1.4%	1.3%	0.0%	27.4%
Livingstone	QLD	1.4%	0.5%	2.0%	-2.0%
Ballina	NSW	1.3%	0.9%	0.9%	107.8%
Whitsunday	QLD	1.3%	0.8%	1.2%	150.0%
Alexandrina	SA	1.1%	1.0%	0.3%	-21.4%
Augusta-Margaret River	WA	1.1%	0.9%	0.4%	-19.5%
Noosa	QLD	1.1%	2.1%	-2.5%	16.5%
East Gippsland	VIC	1.0%	0.8%	0.4%	-14.3%
Albany	WA	0.9%	0.5%	1.0%	82.7%
Snowy Valleys	NSW	0.9%	1.2%	-0.7%	-8.8%
Golden Plains	VIC	0.9%	0.4%	1.2%	-2.5%
Southern Downs	QLD	0.9%	0.7%	0.5%	-19.7%
Scenic Rim	QLD	0.9%	0.4%	1.1%	18.8%
Mid-Western Regional	NSW	0.9%	0.8%	0.2%	149.3%

* 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 p21 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 Jun 2024 vs 12 months to Jun 2023 (%)
Bega Valley	NSW	0.8%	0.6%	0.5%	314.3%
Greater Geraldton	WA	0.8%	0.2%	1.3%	73.9%
Harvey	WA	0.7%	0.2%	1.3%	64.9%
Eurobodalla	NSW	0.7%	0.8%	-0.2%	311.1%
Queanbeyan-Palerang Regional	NSW	0.7%	1.5%	-2.0%	-22.5%
Northam	WA	0.6%	0.4%	0.5%	250.0%
Strathbogie	VIC	0.6%	0.4%	0.4%	296.9%
Goulburn Mulwaree	NSW	0.6%	0.5%	0.2%	140.4%
Murray River	NSW	0.6%	0.2%	0.9%	26.3%
Moira	VIC	0.6%	0.6%	-0.2%	91.9%
Murray Bridge (RC)	SA	0.6%	0.3%	0.6%	40.0%
Chittering	WA	0.5%	0.6%	0.0%	40.2%
South Burnett	QLD	0.5%	0.6%	-0.1%	-64.5%
Barossa	SA	0.5%	0.5%	0.2%	-21.9%
Victor Harbor	SA	0.5%	0.5%	0.1%	-7.7%
Mount Alexander	VIC	0.5%	0.7%	-0.5%	-3.7%
Tablelands	QLD	0.5%	0.1%	0.8%	-46.4%
Wellington	VIC	0.5%	0.7%	-0.4%	2.0%
Toodyay	WA	0.4%	0.4%	0.1%	45.2%
Bunbury	WA	0.4%	0.3%	0.2%	-34.3%

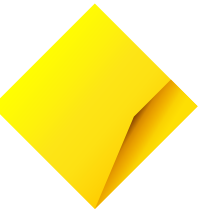
LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Jun 2024 vs 12 months to Jun 2023 (%)
Mansfield	VIC	0.4%	0.4%	0.1%	61.1%
Indigo	VIC	0.4%	0.3%	0.3%	35.9%
Kempsey	NSW	0.4%	0.3%	0.2%	-15.2%
Richmond Valley	NSW	0.4%	0.0%	0.9%	192.9%
Rockhampton	QLD	0.4%	-0.5%	2.0%	20.9%
North Burnett	QLD	0.4%	0.1%	0.6%	81.8%
Ceduna	SA	0.4%	0.3%	0.1%	-4.8%
Mid Murray	SA	0.4%	0.3%	0.2%	-7.3%
Queenscliffe	VIC	0.3%	0.2%	0.3%	184.0%
Waroona	WA	0.3%	0.2%	0.2%	-28.6%
Yorke Peninsula	SA	0.3%	0.2%	0.3%	-11.4%
Kangaroo Island	SA	0.3%	0.2%	0.2%	-7.1%
Capel	WA	0.3%	-0.1%	1.0%	50.0%
Hindmarsh	VIC	0.3%	0.5%	-0.7%	-81.1%
Dungog	NSW	0.3%	0.1%	0.4%	223.5%
Dardanup	WA	0.3%	0.2%	0.2%	-16.9%
Copper Coast	SA	0.3%	0.2%	0.2%	-59.1%
Exmouth	WA	0.3%	0.1%	0.3%	-55.4%
Greater Hume Shire	NSW	0.3%	0.1%	0.4%	-43.0%
Port Lincoln	SA	0.2%	0.1%	0.4%	92.6%

* 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 inflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p21 on the Appendix A4 for definitions and methodology.

A3: Top 5 LGAs by State

Share of Net Internal Migration, Growth in Net Internal Migration



Top 5 LGAs by Share of Net Internal Migration by respective states

New South Wales		Queensland		South Australia		Victoria		Western Australia		Northern Territory		Tasmania	
Lake Macquarie	13.3%	Sunshine Coast	13.3%	Alexandrina	24.5%	Greater Geelong	27.8%	Busselton	23.7%	Unincorporated NT	23.1%	Waratah/Wynyard	29.1%
Maitland	9.8%	Gold Coast	9.8%	Murray Bridge	12.2%	Moorabool	18.4%	Augusta-Margaret River	12.6%	Coomalie	21.8%	Tasman	20.6%
Cessnock	8.8%	Fraser Coast	8.8%	Barossa	11.7%	Baw Baw	8.9%	Albany	10.8%	Roper Gulf	17.9%	George Town	16.6%
Port Macquarie-Hastings	8.0%	Mackay	8.0%	Victor Harbor	11.1%	Ballarat	8.7%	Greater Geraldton	8.6%	East Arnhem	12.8%	Huon Valley	13.1%
Shoalhaven	7.8%	Bundaberg	7.8%	Ceduna	8.1%	Bass Coast	6.9%	Harvey	8.3%	Central Desert	12.8%	Central Highlands	8.5%

Top 5 LGAs by Growth in Net Internal Migration

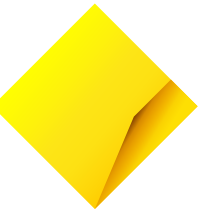
New South Wales		Queensland		South Australia*		Victoria		Western Australia		Northern Territory**		Tasmania**	
Bega Valley	314.3%	Whitsunday	150.0%	Port Lincoln	92.6%	Strathbogie	296.9%	Northam	250.0%				
Eurobodalla	311.1%	North Burnett	81.8%	Murray Bridge	40.0%	Surf Coast	225.0%	Albany	82.7%				
Dungog	223.5%	Townsville	31.1%			Queenscliffe	184.0%	Greater Geraldton	73.9%				
Richmond Valley	192.9%	Rockhampton	20.9%			Moira	91.9%	Harvey	64.9%				
Mid-Western Regional	149.3%	Scenic Rim	18.8%			Mansfield	61.1%	Capel	50.0%				

* In South Australia, two LGAs exhibited positive growth in net internal migration.

**The Top Five LGAs by Growth for Northern Territory and Tasmania did not meet the net internal migration criteria to be included in the RMI publication. See methodology on p 21. NB the fastest growing LGA based on net internal migration for Northern Territory is Coomalie; for Tasmania is Tasman.

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.

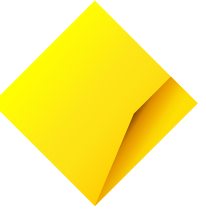
A region's population will change according to changes in:

- 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:

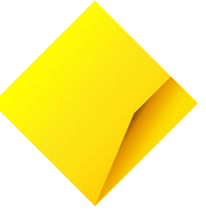
- (1) **Total Net Internal Migration** – the report identifies the top five regional local government areas receiving the largest net internal migration inflows (irrespective of whether these inflows are from capitals or other regions) during the 12 months to the June quarter 2024. It also identifies 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**.

* In the 12 months to June quarter 2024 there were eleven LGAs that experienced total net internal migration inflows of 50 or more people, but their net inflows in the 12 months to June quarter previous year (2023) were 10 people or less, so they are excluded in Appendix A2. 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: Wollongong (150%), Wingecarribee(215%), Byron (148%), Latrobe (Vic.) (1929%), Orange(312%), Albury(175%), Yass Valley(640%), Kiama (577%), Wangaratta(2667%), Narrabri (259%) and Waratah/ Wynyard(2033%).

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 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.

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 13 per cent;
- those from regional Australia to capitals account for around 10 per cent;
- those from capitals to regional Australia account for around 11 per cent, and
- those within and between capitals account for around 66 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.