

# Regional Movers Index

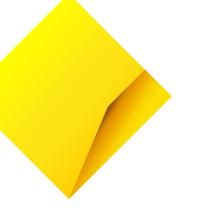
Mar 2025 Quarter Report

Powered by:



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Bank





# What is the Regional Movers Index?

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

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

Released quarterly, the RMI was established at the height of the COVID-19 pandemic to track the movement of capital city people to the regions. The RMI publication also highlighted that regional people were tending to stay in regions to avoid those severe capital-city lockdowns. Housing and cost of living pressures are continuing to influence the patterns of movement within Australia, and the RMI publication has been refined to focus on the net migration flows to give current information on the extent to which regional populations are either growing or shrinking. See pp 17-19 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 more than 14.3 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

## More capital-city people make a regional move as 2025 gets underway

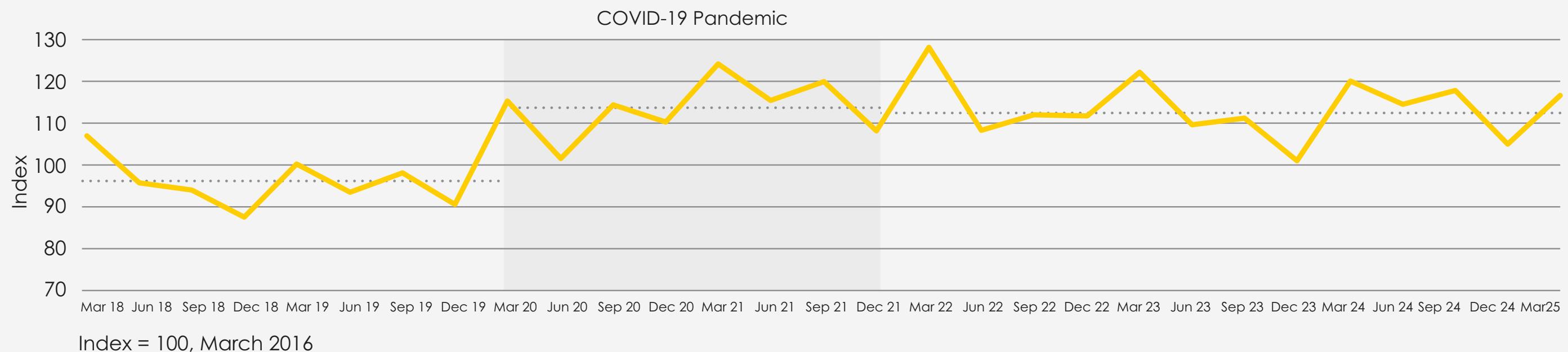
The number of capital-city people moving into Australia's regions ticked higher in the first quarter of 2025.

The Regional Movers Index (RMI) – which tracks migration from capital cities to regional areas – increased by 10.5 per cent in the March quarter of 2025.

This result is the latest in an overall trend, post COVID, of ongoing high-levels of migration flows out of Australia's capitals and into the regions.

The number of capital-city people moving into Australia's regions each quarter has remained elevated since the onset of the pandemic through to the post-COVID era; remaining around 20.5 per cent higher the pre-COVID average level of quarterly migration.

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



### Breakdown of total major relocations March Quarter 2025

From	To	
	Regional Australia	Capital Cities
Regional Australia	12.8%	9.2%
Capital Cities	11.6%	66.4%

See pg 19, Note on methodology: definitions of inter-regional, inter-capital, region-region and capital-region migration, which discusses the shares under this breakdown of total major relocations.

# Net Internal Migration to Regional Australia



## More people moving from cities to regions than from regions to cities

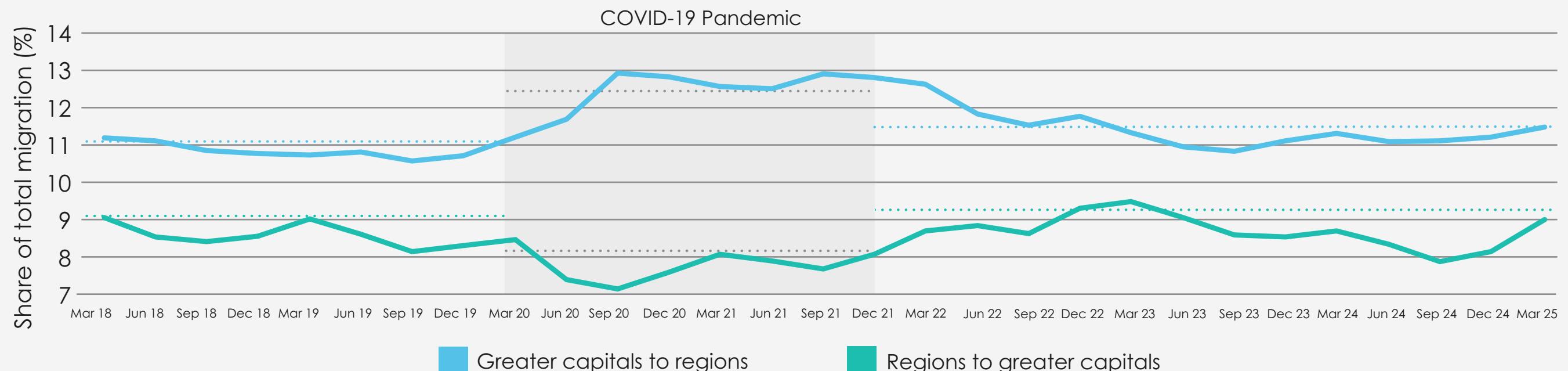
In the March 2025 quarter, capital city people moving to Australia's regions outnumbered regional people making a move in the opposite direction by 25 per cent.

Net migration to Australia's regions in the March 2025 quarter was lower than in the previous quarter (down by 7.7 per cent) but is still a significant 40 per cent higher than the prevailing level of net migration pre-COVID. This migration is a key driver of population growth in Australia's regions.

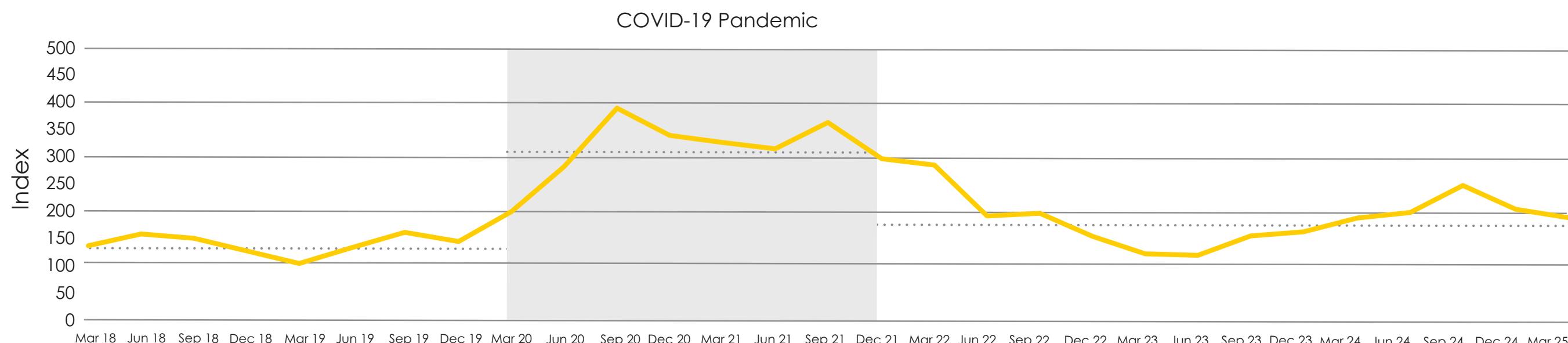
Overall, the migration flows from regions into the capitals have resumed their typical pre-COVID shares of overall migration. In the March 2025 quarter, the number of regional people moving into the capitals accounted for a 9.2 per cent share of all internal migration (see previous slide); on par with the share prevailing pre-COVID, some 9.1 per cent of all moves over that period.

Despite migration from regions to capitals returning to pre-COVID levels, migration flow from capitals to regions remains high, driving overall net migration to regions, and overall regional population growth, higher.

### Regional migration - share of all internal migration



### Net migration to regional areas – indexed



# Migration Patterns By State



## Migration from capitals channelled to regional NSW and regional Victoria

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 **net migration into regional areas**.

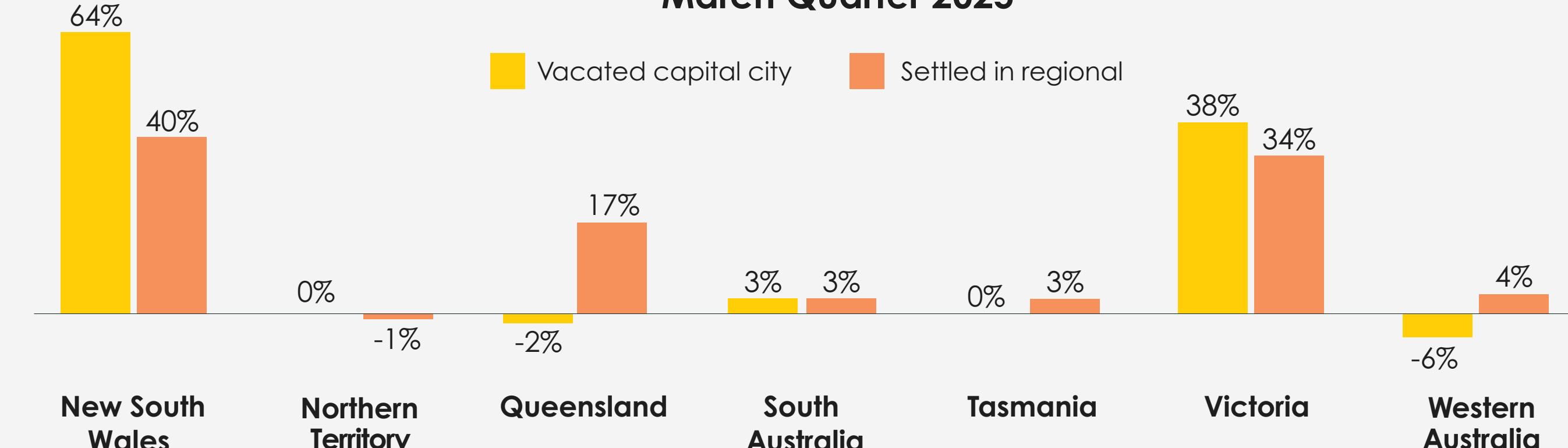
The elevated levels of net migration into Australia's regions are being driven predominantly by Sydney and Melbourne. In the March 2025 quarter Sydneysiders accounted for 64 per cent of the net outflow from all the country's capitals into regions; Melburnians accounted for 38 per cent.

The net migration from capitals into regions is being channelled predominantly into regional NSW and regional Victoria. Nearly three quarters of the total net migration to all regions was to those two states.

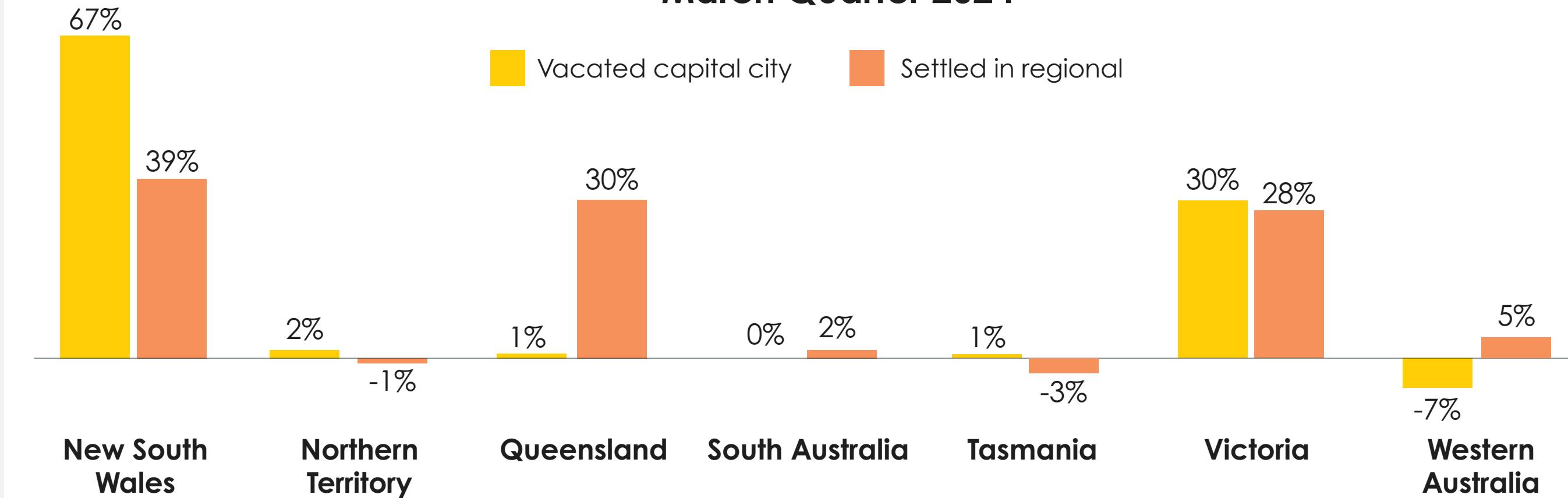
This state breakdown in migration patterns is broadly similar with a year earlier. The key difference is that regional Queensland is welcoming in a significantly smaller share of those net migration inflows, while regional Victoria has experienced an increase.

Meanwhile, Tasmania has seen a reversal of the net outflows from its regions last year to receiving net inflows in the March 2025 quarter, accounting for 3 per cent of all net inflows to regions.

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



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





# Regional Hotspots by Share

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

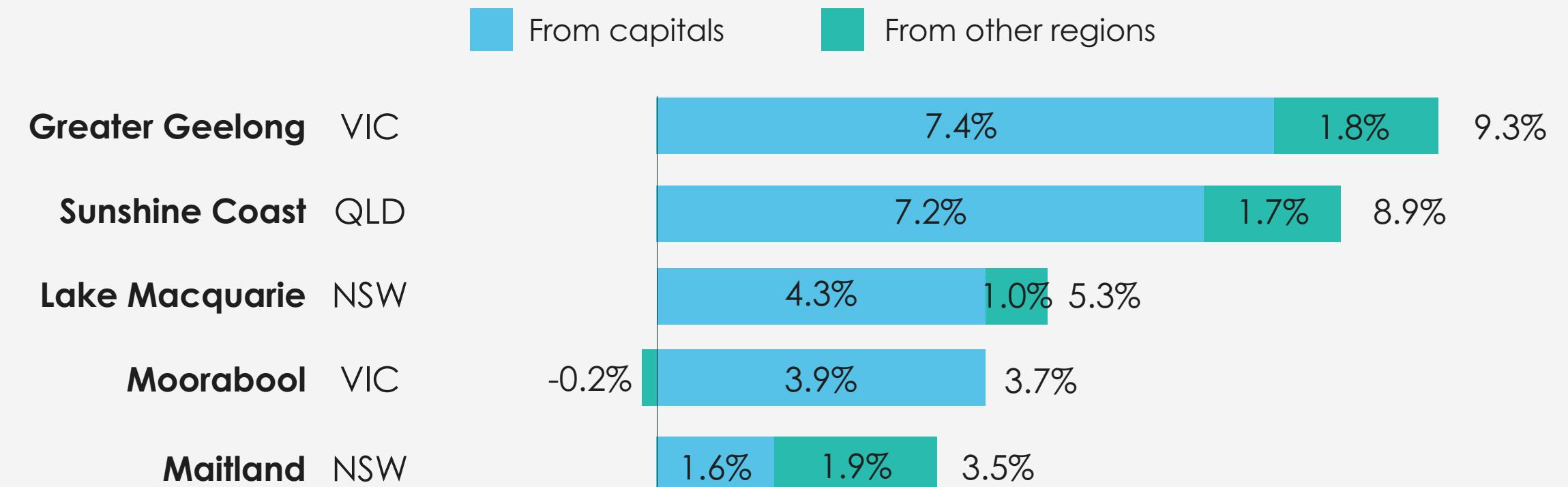
Greater Geelong has toppled the Sunshine Coast to be the LGA receiving the largest inflow of net internal migration in the 12 months to March 2025. A significant increase in net migration to Geelong during the 12 months to March 2025 saw the Cats' hometown account for 9.3 per cent of all net migration to regions.

Meanwhile the reduction in net migration to the Sunshine Coast over the same period saw it lose its top spot on the leader board.

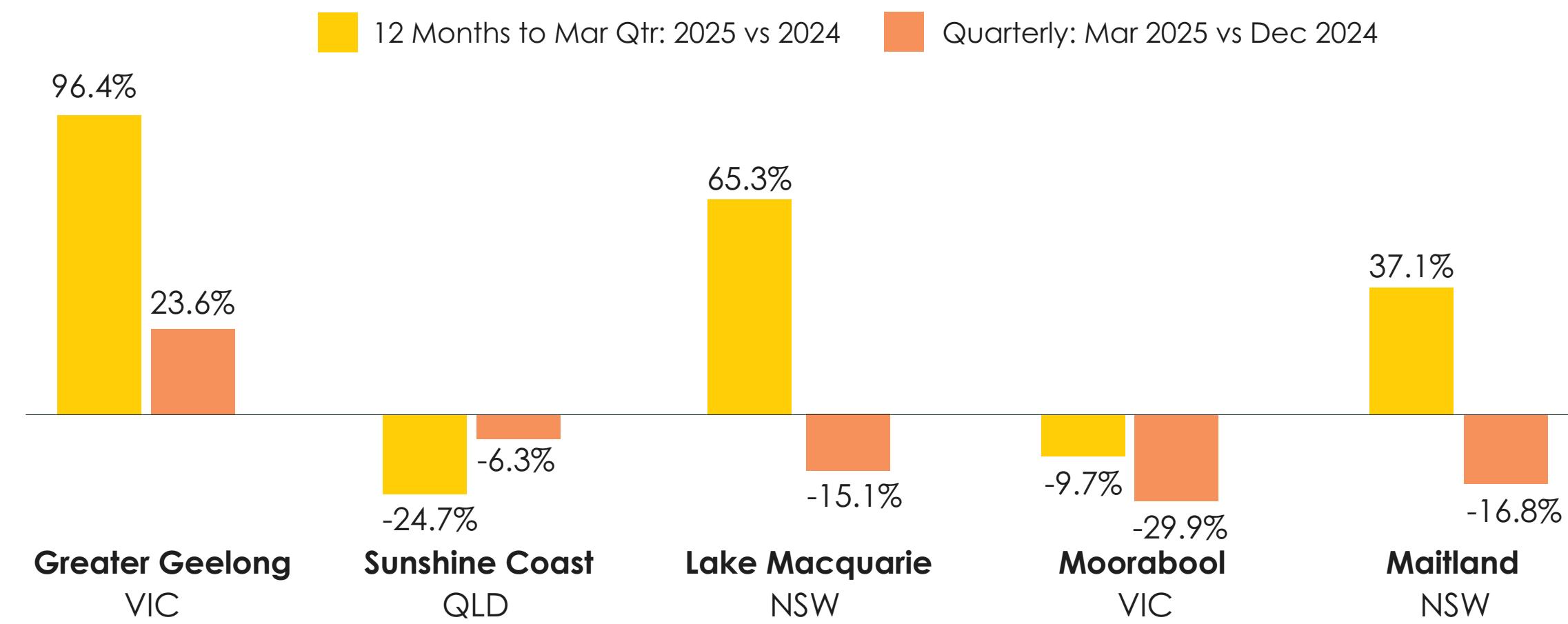
Both LGAs are gaining significant population from the capitals – this is the key driver of net internal migration, above gaining population from other regions. This is also the case for third and fourth places, Lake Macquarie and Moorabool, respectively. Moorabool lost people to other regions during the 12 months to March 2025, which weighed on the overall net migration to the LGA during that period.

In contrast, Maitland is attracting in people not only from the capitals, but also from other regions, with the latter a slightly more significant driver of overall net migration to the LGA.

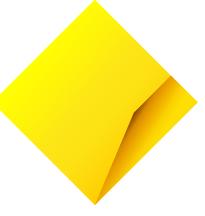
Top Five LGAs by share of total net internal migration to regional Australia, 12 months to Mar 2025



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



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



# Regional Hotspots by Growth

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

Growth hotspots of net internal migration during the 12 months to March 2025 are spread across mainly Victoria and Western Australia.

These growth hotspots – where net internal migration in the 12 months to March 2025 grew most significantly over the previous 12 months – are generally outside of the peri-urban, capital-city commuter belts.

Across Australia's regions, Latrobe in Victoria recorded the strongest annual growth in net internal migration during the 12 months to March 2025. This growth was driven fairly evenly between net migration from both capitals and other regions.

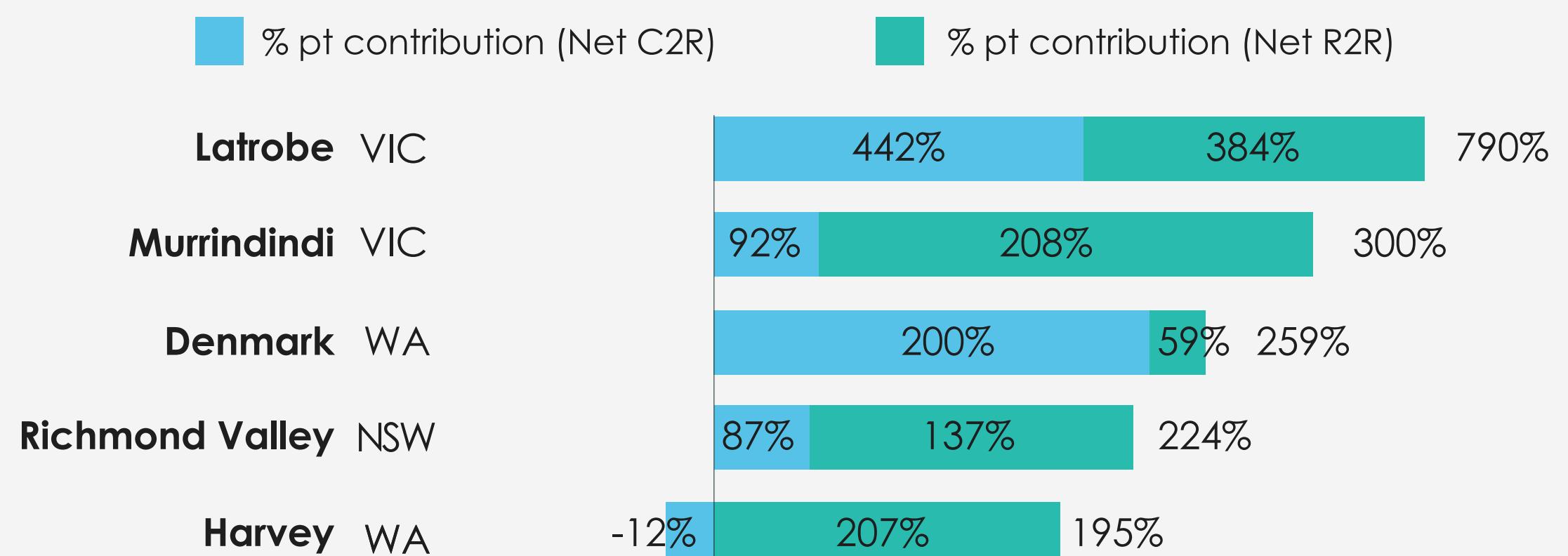
Murrindindi, at second place, while closer to Melbourne, saw net migration from other regions as the driver of strong growth in overall net migration during this period.

In third place, the remote southwestern corner of WA proved attractive to city dwellers – a significant increase in net migration from capitals drove overall growth in net migration to the LGA of Denmark.

Richmond Valley – in fourth place – is the only growth hotspot located in regional NSW, with net migration from other regions driving the strong growth over the last 12 months.

Harvey is an attractive destination for people from other regions. Net migration from other regions into Harvey has driven the overall growth in net migration during the 12 months to March 2025, while a reduction in net migration from capitals detracted from the overall growth.

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





# Most Popular Places for Capital-City People

## Top Five LGAs: largest net inflows from capitals

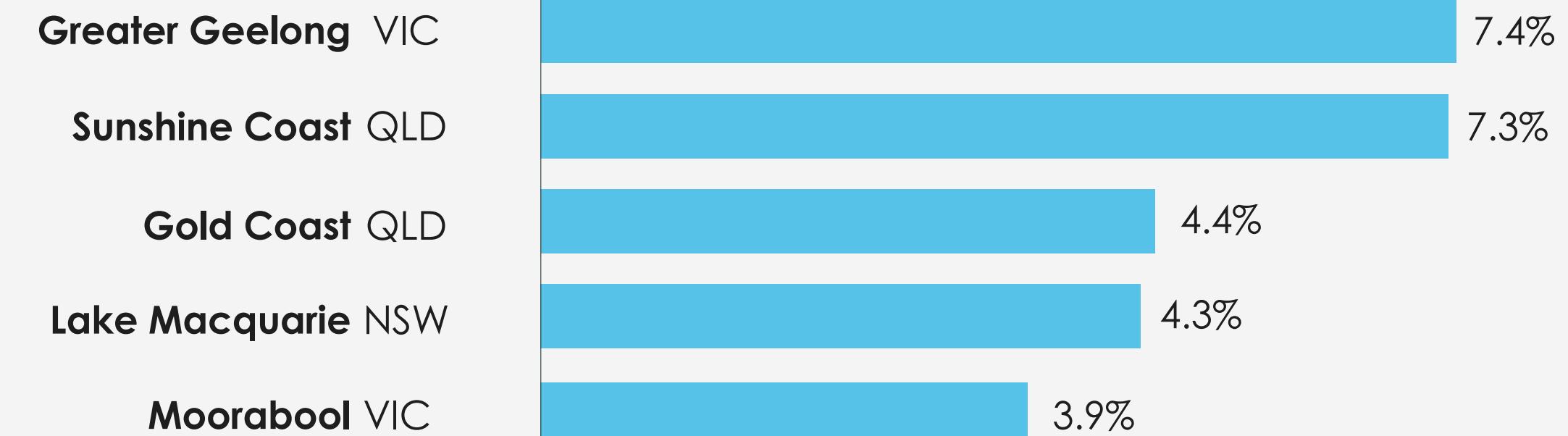
There are regions across the country gaining significant population from capitals. This list identifies the places gaining most people, in net terms.

The key result in this update is that Greater Geelong is now the number one destination accounting for a share of 7.4 per cent of net migration from capital cities.

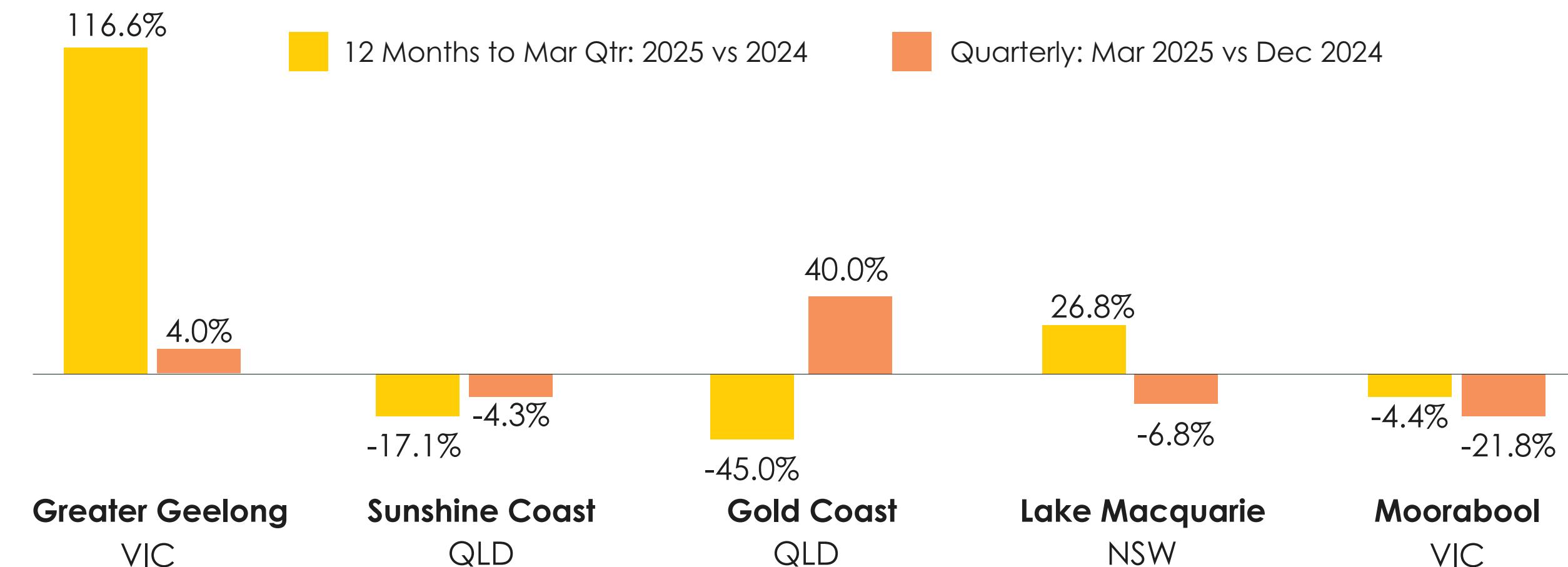
Greater Geelong unseated the Sunshine Coast – holder of the number one position for two years and now in second place with a share of 7.3 per cent.

The Gold Coast, Lake Macquarie and Moorabool round out the top five positions, accounting for 4.4 per cent, 4.3 per cent and 3.9 per cent, respectively of the net migration from capitals to regions.

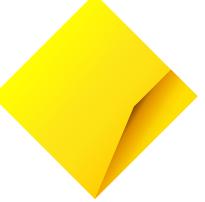
Top Five LGAs by share of net capital-regional migration  
12 months to Mar 2025



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



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



# Increasingly Popular Places for Capital-City People

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

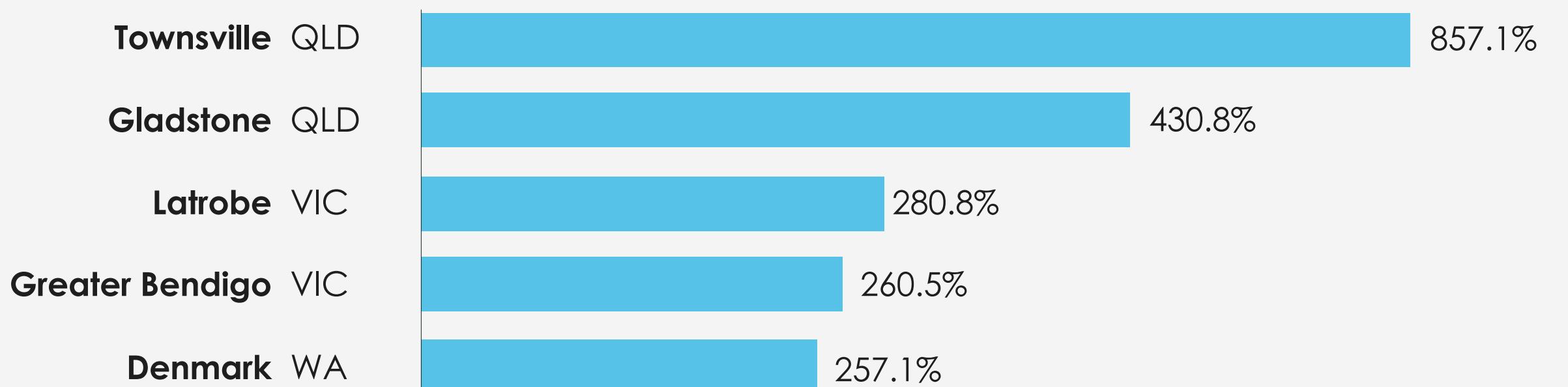
Queensland and Victoria are home to the LGAs where the net inflow from capitals in the 12 months to March 2025 has increased most significantly on the previous 12 months, with Denmark representing WA on the list.

Townsville – which typically attracts in residents from other regions – tops the list, recording the most significant growth in net migration from capitals.

Gladstone re-emerges among this group after some years, recording the second strongest growth in net migration from capitals.

Latrobe, Greater Bendigo and Denmark make up third, fourth and fifth places, respectively. Greater Bendigo in particular has previously seen strong growth in net migration driven from other regions, rather than from the capitals.

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



# Inter-Regional Migration

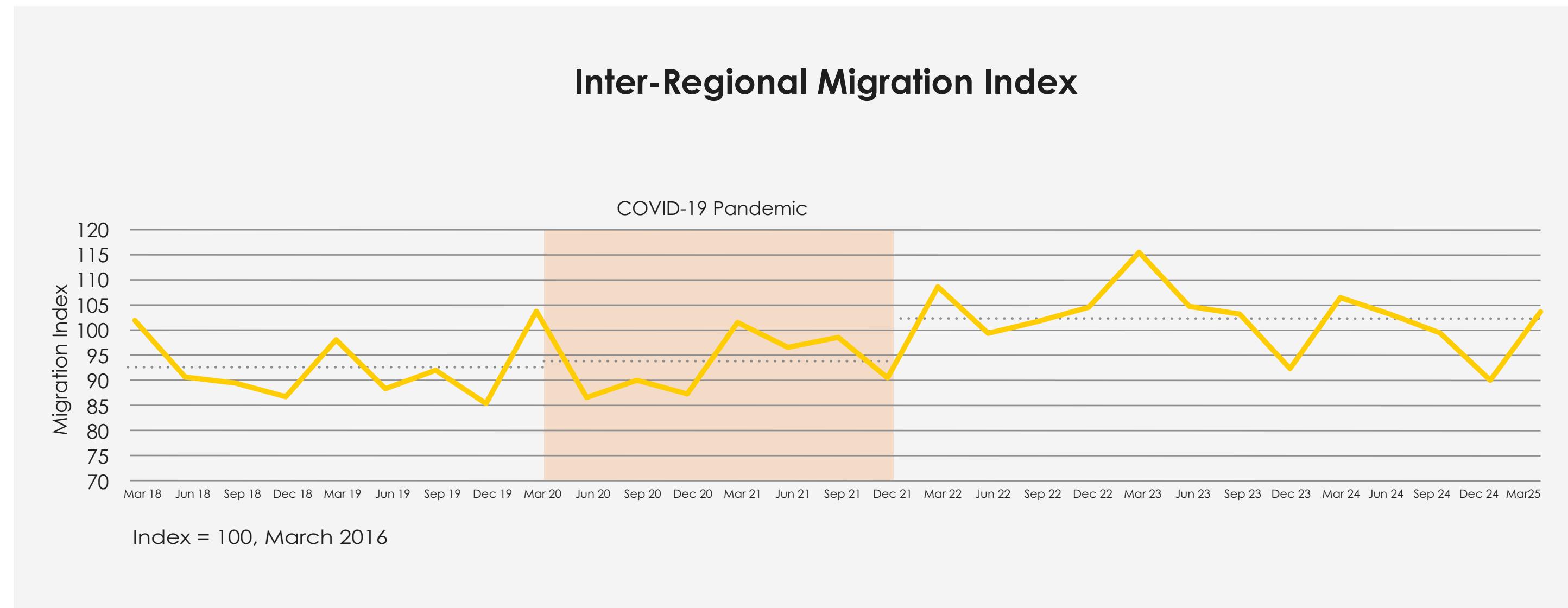


## Inter-regional migration rises to maintain elevated movement

The Inter-Regional Migration Index, which tracks region to region migration, moved higher, by 14.4 per cent in the March 2025 quarter. It reached a level indicating that inter-regional migration during the quarter remained on par with the elevated, post-COVID average.

Mobility remains high across the regions – regional people are relocating in greater numbers compared with the pandemic period, and also prior to the pandemic.

However, a moderation in regional movement may be underway, with the number of regional people making a regional move in the March 2025 quarter 2.5 per cent lower than in the March 2024 quarter. Annual declines have been recorded now for six consecutive quarters.





# Most Popular Places for Regional People

## Top Five LGAs: largest net inflows from regions

While much of this publication focuses on migration flows between capitals and regions, there are regions across the country that are gaining significant population from other regions. This list identifies the places gaining most people, in net terms. The usual suspects make up most of those places for the 12 months to March 2025.

The key result in this update is that Maitland has toppled the Sunshine Coast for top spot, the latter falling not one, but two places to third, in terms of the net gain it is receiving in people from other regions.

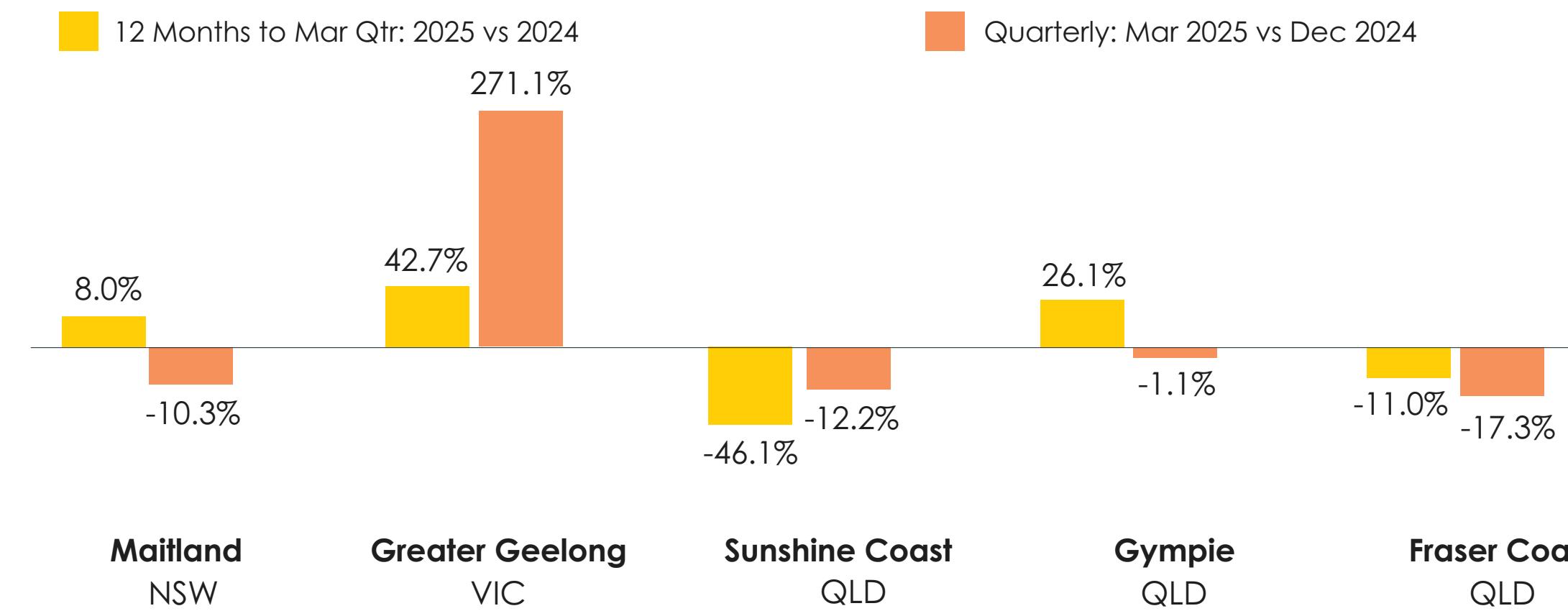
Gympie returns to the list, at fourth place, after debuting last quarter. Meanwhile Fraser Coast has traditionally been a place that receives a significant net gain in people from other regions, coming in at fifth in this update.

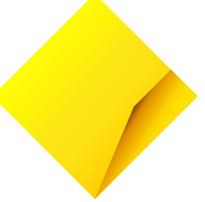
*It should be noted that the net migration inflows from regions are: inflows to a region minus the outflow to other regions.*

Top Five LGAs by share of net regional-regional migration  
12 months to Mar qtr 2025



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





# Increasingly Popular Places for Regional People

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

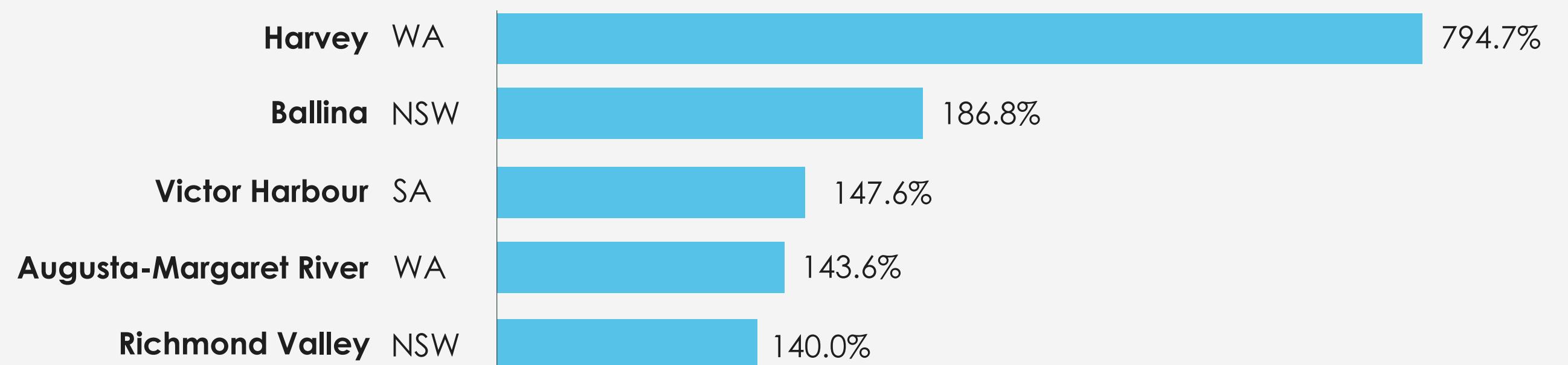
Of the regions gaining population from other regions, in net terms, these are the LGAs where the net inflow from regions in the 12 months to March 2025 has increased most significantly on the previous 12 months.

The top five LGAs are spread quite widely, spanning NSW, WA and SA.

Taking out the top spot was Harvey in WA – the massive increase in net migration from other regions, saw the LGA among the top five for overall (both capital and regional) net migration.

Ballina, Victor Harbor, Augusta-Margaret River and Richmond Valley round out the top five places experiencing the strong growth in net migration from other regions during last 12 months.

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



# Appendix



REGIONAL  
AUSTRALIA  
INSTITUTE



# 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 p 22, 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 last 12 months to March 2025 of 50 or more people.
- Have had a base of net internal migration, net capital-region or net region-region inflows in last 12 months to March 2024 of more than 10 people. This is to filter out significant outlier results associated with changes in small numbers. Significant outlier growth rates are not published or ranked.

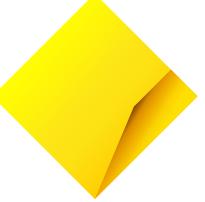
8 14 LGAs have a percentage of their constituency defined as Capital and the other percentage defined as Regional. These LGAs include Scenic Rim (R), Light (RegC), Barossa (DC), Yarra Ranges (S), Lockyer Valley (R), Kingborough (M), Murrindindi (S), Derwent Valley (M), Murray (S), Mallala (DC), Moorabool (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 The Business Banking business unit of the Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945 (Bank) has prepared this report. References to the "Group" are to the Bank and its subsidiaries (including Commonwealth Securities Limited ABN 60 067 254 300 AFSL 238814, Commonwealth Australia Securities LLC and CBA Europe Ltd) and includes the directors, employees and representatives of the Bank and its subsidiaries.

# A2: All LGAs

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



LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Mar 2025 vs 12 months to Mar 2024 (%)
Greater Geelong	VIC	<b>9.3%</b>	7.4%	5.3%	96.4%
Sunshine Coast	QLD	<b>8.9%</b>	7.3%	4.8%	-24.7%
Lake Macquarie	NSW	<b>5.3%</b>	4.3%	2.8%	65.3%
Moorabool	VIC	<b>3.7%</b>	3.9%	-0.4%	-9.7%
Maitland	NSW	<b>3.5%</b>	1.6%	5.5%	37.1%
Fraser Coast	QLD	<b>3.3%</b>	1.9%	4.1%	0.7%
Shoalhaven	NSW	<b>2.6%</b>	2.3%	0.8%	35.7%
Port Macquarie-Hastings	NSW	<b>2.6%</b>	1.9%	1.8%	18.2%
Shellharbour	NSW	<b>2.5%</b>	1.5%	3.0%	27.6%
Ballarat	VIC	<b>2.4%</b>	2.0%	1.2%	32.3%
Greater Bendigo	VIC	<b>2.4%</b>	1.7%	1.9%	85.6%
Cessnock	NSW	<b>2.3%</b>	1.5%	2.4%	-13.4%
Mid-Coast	NSW	<b>2.2%</b>	2.1%	0.2%	27.9%
Gympie	QLD	<b>2.0%</b>	0.5%	4.3%	8.1%
Tweed	NSW	<b>1.8%</b>	1.2%	1.8%	2.7%
Busselton	WA	<b>1.8%</b>	1.3%	1.4%	7.9%
Port Stephens	NSW	<b>1.7%</b>	1.4%	0.9%	-5.2%
Baw Baw	VIC	<b>1.7%</b>	2.1%	-1.3%	-21.8%
Mackay	QLD	<b>1.6%</b>	0.3%	3.6%	-9.2%
Bass Coast	VIC	<b>1.6%</b>	1.5%	0.1%	-11.0%
Livingstone	QLD	<b>1.6%</b>	0.6%	2.8%	84.4%
Toowoomba	QLD	<b>1.5%</b>	0.1%	3.9%	34.9%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Mar 2025 vs 12 months to Mar 2024 (%)
Bundaberg	QLD	<b>1.3%</b>	0.6%	2.1%	-36.5%
Townsville	QLD	<b>1.3%</b>	0.5%	2.2%	-28.6%
Ballina	NSW	<b>1.2%</b>	0.7%	1.7%	40.4%
East Gippsland	VIC	<b>1.2%</b>	1.0%	0.8%	131.2%
Albury	NSW	<b>1.2%</b>	0.7%	1.4%	190.6%
Wingecarribee	NSW	<b>1.2%</b>	1.7%	-1.4%	78.4%
Latrobe	VIC	<b>1.1%</b>	0.8%	1.1%	790.9%
Augusta-Margaret River	WA	<b>1.1%</b>	0.7%	1.1%	15.8%
Queanbeyan-Palerang Regional	NSW	<b>1.1%</b>	1.4%	-0.9%	76.3%
Gladstone	QLD	<b>1.0%</b>	0.3%	2.2%	4.7%
Gold Coast	QLD	<b>1.0%</b>	4.4%	-9.8%	-85.1%
Snowy Valleys	NSW	<b>0.9%</b>	1.1%	-0.7%	-0.4%
Harvey	WA	<b>0.8%</b>	0.2%	1.9%	194.5%
Scenic Rim	QLD	<b>0.8%</b>	0.4%	1.3%	36.9%
Whitsunday	QLD	<b>0.8%</b>	0.6%	0.5%	-22.3%
Moira	VIC	<b>0.8%</b>	0.9%	-0.3%	98.0%
Noosa	QLD	<b>0.8%</b>	1.5%	-2.2%	-24.3%
Bega Valley	NSW	<b>0.7%</b>	0.5%	0.6%	31.7%
Surf Coast	VIC	<b>0.7%</b>	1.1%	-1.1%	-34.0%
Albany	WA	<b>0.7%</b>	0.4%	0.8%	41.5%
Alexandrina	SA	<b>0.7%</b>	0.7%	0.0%	-31.7%
Victor Harbor	SA	<b>0.7%</b>	0.5%	0.6%	48.7%

\* 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 p 18 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 Mar 2025 vs 12 months to Mar 2024 (%)
South Burnett	QLD	0.7%	0.6%	0.3%	-9.1%
Eurobodalla	NSW	0.7%	0.7%	-0.3%	35.2%
Clarence Valley	NSW	0.6%	0.2%	1.4%	-57.7%
Orange	NSW	0.6%	0.8%	-0.5%	35.8%
Southern Downs	QLD	0.6%	0.5%	0.3%	-34.4%
Richmond Valley	NSW	0.6%	0.2%	1.2%	223.9%
Murray River	NSW	0.6%	0.2%	1.0%	46.5%
Strathbogie	VIC	0.5%	0.4%	0.4%	94.4%
Mid-Western Regional	NSW	0.5%	0.7%	-0.5%	-6.9%
Golden Plains	VIC	0.5%	0.2%	0.8%	-31.5%
Goulburn Mulwaree	NSW	0.5%	0.5%	-0.1%	34.3%
Greater Geraldton	WA	0.5%	0.0%	1.4%	-32.1%
Capel	WA	0.5%	0.1%	1.1%	64.9%
Barossa	SA	0.4%	0.4%	0.0%	-15.1%
Yass Valley	NSW	0.4%	0.5%	-0.3%	94.4%
Kempsey	NSW	0.4%	0.3%	0.4%	27.5%
Wellington	VIC	0.4%	0.6%	-0.7%	11.2%
Denmark	WA	0.4%	0.3%	0.2%	259.3%
Alexandrina	SA	0.7%	0.7%	0.0%	-31.7%
Bunbury	WA	0.4%	0.4%	0.1%	-17.9%
Northam	WA	0.4%	0.3%	0.2%	-22.0%
Mansfield	VIC	0.3%	0.4%	-0.2%	10.4%
Hindmarsh	VIC	0.3%	0.5%	-0.6%	5.0%
Huon Valley	TAS	0.3%	0.2%	0.3%	186.2%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Mar 2025 vs 12 months to Mar 2024 (%)
Kangaroo Island	SA	0.3%	0.2%	0.2%	28.1%
Yorke Peninsula	SA	0.3%	0.2%	0.3%	60.8%
Mount Alexander	VIC	0.3%	0.6%	-0.9%	-6.0%
Copper Coast	SA	0.3%	0.2%	0.2%	56.0%
Murray Bridge	SA	0.3%	0.2%	0.3%	-33.9%
Wangaratta	VIC	0.3%	0.3%	0.1%	41.5%
Ceduna	SA	0.3%	0.3%	0.0%	-1.3%
Mid Murray	SA	0.3%	0.2%	0.3%	-16.9%
Nambucca Valley	NSW	0.3%	0.2%	0.2%	-6.8%
Gingin	WA	0.3%	0.2%	0.2%	34.0%
Queenscliffe	VIC	0.3%	0.2%	0.3%	55.8%
Toodyay	WA	0.2%	0.2%	0.1%	-29.2%
Pyrenees	VIC	0.2%	0.2%	0.3%	47.6%
Rockhampton	QLD	0.2%	0.0%	0.8%	29.8%
Light (RegC)	SA	0.2%	0.2%	0.0%	22.4%
Dandaragan (S)	WA	0.2%	0.1%	0.3%	100.0%
North Burnett	QLD	0.2%	0.1%	0.5%	-28.9%
Exmouth	WA	0.2%	0.1%	0.2%	14.0%
Dungog	NSW	0.2%	0.2%	0.2%	107.7%
Murrindindi	VIC	0.2%	0.3%	-0.3%	300.0%
Hinchinbrook	QLD	0.2%	0.1%	0.4%	147.6%
Tablelands	QLD	0.2%	0.0%	0.7%	-57.1%
West Tamar (M)	TAS	0.2%	-0.1%	0.7%	92.3%
Donnybrook-Balingup (S)	WA	0.2%	0.1%	0.2%	47.1%

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

\* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p 18 on the Appendix A4 for definitions and methodology.

# A4: Note on methodology

## Net migration and population growth



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

Now that Australia is living with COVID and population flows from regions to capitals have resumed, the RMI publication is honing its focus to understand the **NET** migration inflows that Australia's regions are continuing to experience. That is, the RMI is now not only considering the one-way flow of population movements from capitals to regions, but it is also considering the population movements in the other direction, by focusing on net flows. The RMI publication is also now considering the breakdown

of net migration flows into the various regional LGAs: net migration from capital cities and net migration from other regions. Together, this provides an invaluable source of information on a key driver of local population changes: net internal migration.

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

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

# A4: Note on methodology

## Ranking the Top Five LGAs



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

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

# 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 them 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.