

City Pulse | Quarterly Report | July 2022



SYDNEY



ADELAIDE



MELBOURNE



BRISBANE



DARWIN



PERTH



HOBART



CANBERRA

Contents

Content	Page link	Source
Summary	3	-
Population	4	Australian Bureau of Statistics, Regional Population
Establishments	5	Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits
Gross State Product	6	Australian Bureau of Statistics, Australian National Accounts: State Accounts
Sales & Service Income	7	Australian Bureau of Statistics, Australian Industry
Personal Insolvencies	8	Australian Financial Security Authority, Personal Insolvency Statistics
Employment	9	Australian Bureau of Statistics, Weekly Payroll Jobs and Wages in Australia
Unemployment	10	Australian Bureau of Statistics, Labour Force, Australia, Detailed
Airport Passengers	11	Bureau of Infrastructure and Transport Research Economics, Airport Traffic Data
International Students	12	Australian Trade and Investment Commission, Education Data
Retail & Recreation Visits	13	Google, Global Mobility Reports
Appendix	14	-

Summary

Australia's economy (Gross State Product) grew 1.5% from 2020 and 2021, following stagnation from 2019 to 2020

- South Australia outperformed this (+3.9%) while Northern Territory contracted (-0.6%)

Employing establishments in 2021 have increased – particularly in Brisbane, Sydney and Melbourne

- This is driven by professional, scientific and technical services (+15% on 2020), construction (+10%) and accommodation and food services (+10%)

The labour force across most capital cities is now higher (+6 to 15%) than pre-pandemic, the exceptions being:

- Melbourne, where employment has only just returned to pre-pandemic levels
- Sydney, which is still 5% below pre-pandemic levels
- Across all cities, unemployment rates have been consistently declining to historic lows

Inbound international passengers are increasing, but are still 65% down on pre-pandemic levels (Apr '22 vs Apr '19)

- Much of this may be tourism and business related, with international student levels 26% down

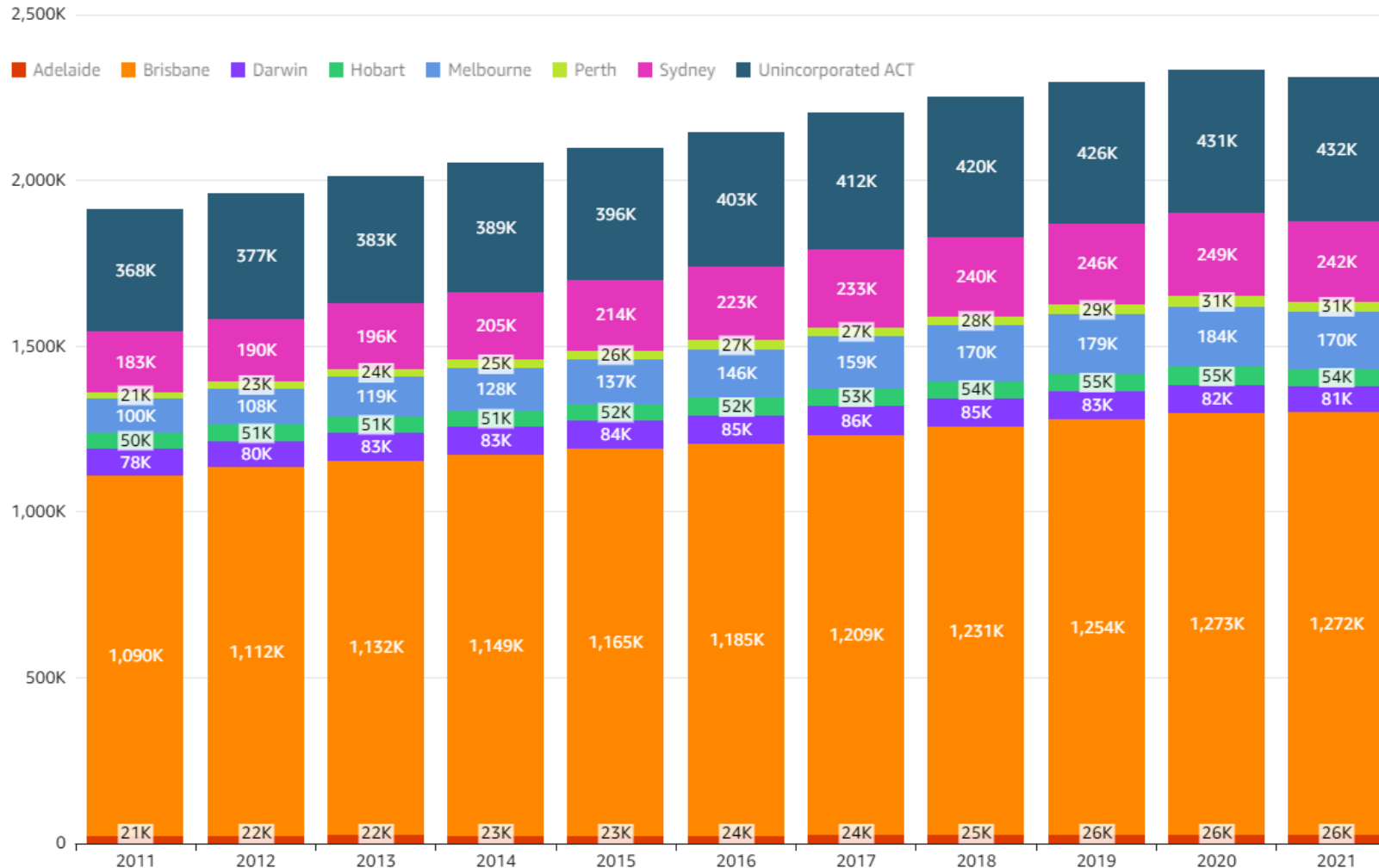
Trends in visits to retail and recreation sites are broadly in line with labour force trends, with most cities having recovered, with the exception of:

- Melbourne – where visits are 26% down compared to pre-pandemic levels (Jan 2020)
- Sydney – where visits are 46% down compared to pre-pandemic levels

City Pulse – POPULATION

Total Population by Capital City Local Government Area

[Australian Bureau of Statistics, Regional Population](#): Accessed 9 July 2022



An important consideration when comparing aggregated data in Australia's capital city Local Government Areas (LGAs) is the wide variation in the population and geographic size of each council area. For example, in 2021, **Brisbane's** population was estimated to be 1.3 million, representing 55% of the total capital city population and covering a much larger geographic area than the other capital city LGAs, while **Adelaide's** 2021 population was 26,000.

In the ten years from 2011 and 2021, the total population residing in Australia's capital city LGAs rose by 21%, growing from 1.9 million to 2.3 million. **Melbourne** experienced the greatest percentage growth in population across this time period (+69%), followed by **Perth** (+46%) and **Sydney** (32%).

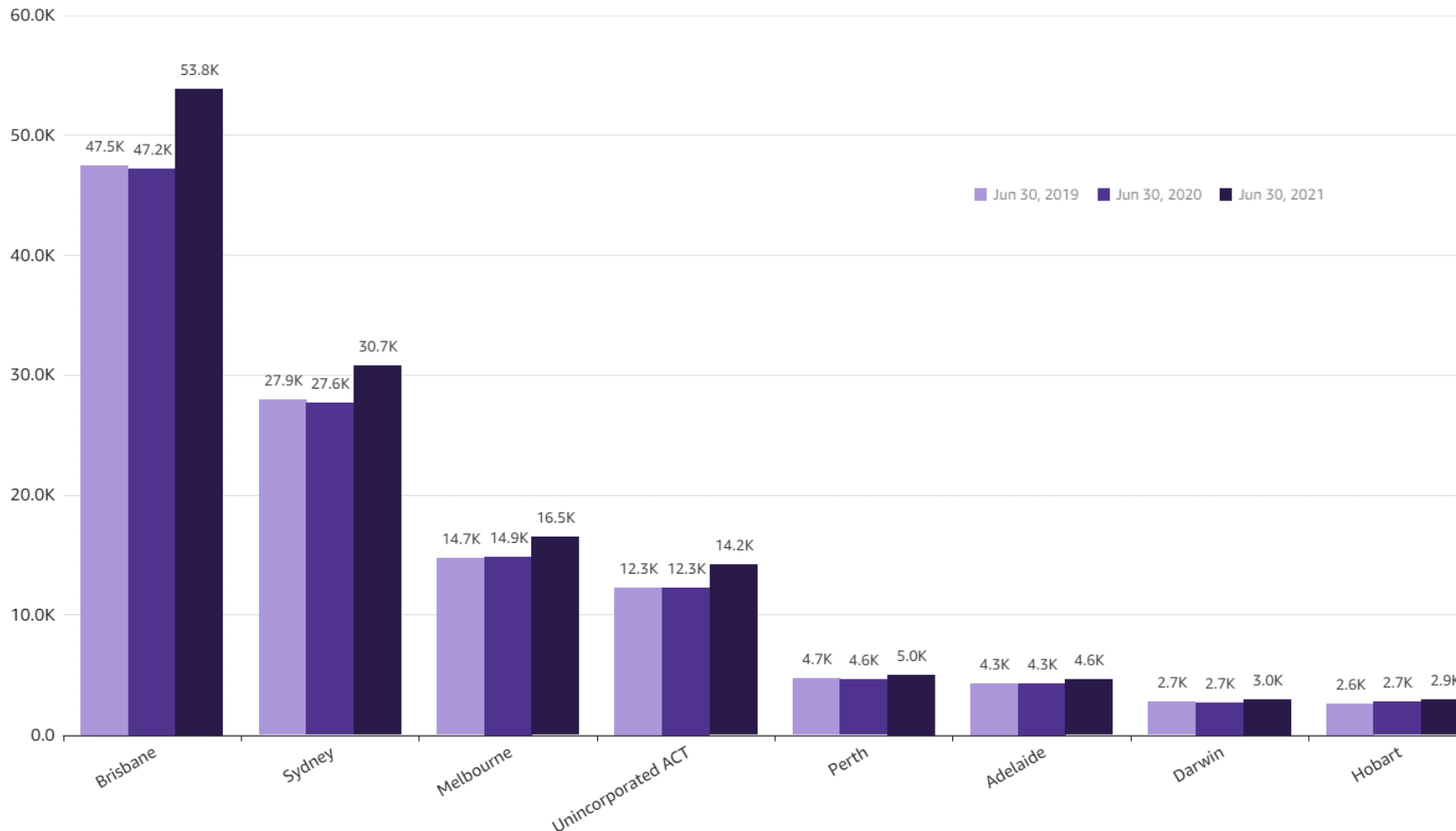
Following the onset of the pandemic, the population in Australia's capital cities fell by 1% between 2020 and 2021, with greatest falls in **Melbourne** (-7.5%), **Sydney** (-2.6%) and **Hobart** (-1.8%).

It should be noted that the ABS' regional population dataset is estimated. As such, 2021 figures differ from the 2021 Census and are likely to be revised in a future release. For example, the latest Census data shows that the 2021 population in the ACT had expanded to 453,890.

City Pulse – ECONOMIC – Establishments

Employing Establishments by Capital City Local Government Area

[Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits](#): Accessed 9 July 2022



On 30 June 2021 there were 314,352 actively trading businesses within Australia's capital city LGAs. Of these, only 42% had employees. Between 2020 and 2021, the number of employing business increased by 12% (+14,396), while the number of non-employing businesses declined by -2% (-4,599). The growth in employing business was driven by the 1-19 employee business size band (+14% / +14,268).

The sector with the greatest growth (both percentage and numeric) in employing business between 2020 and 2021 was *Professional, Scientific and Technical Services* (+4,075/+15%). This sector accounts for 25% of all business within Australia's capital cities, followed by *Construction*(10%) and *Accommodation and Food Services* (10%). All capital cities experienced growth in these three sectors between 2020 and 2021.

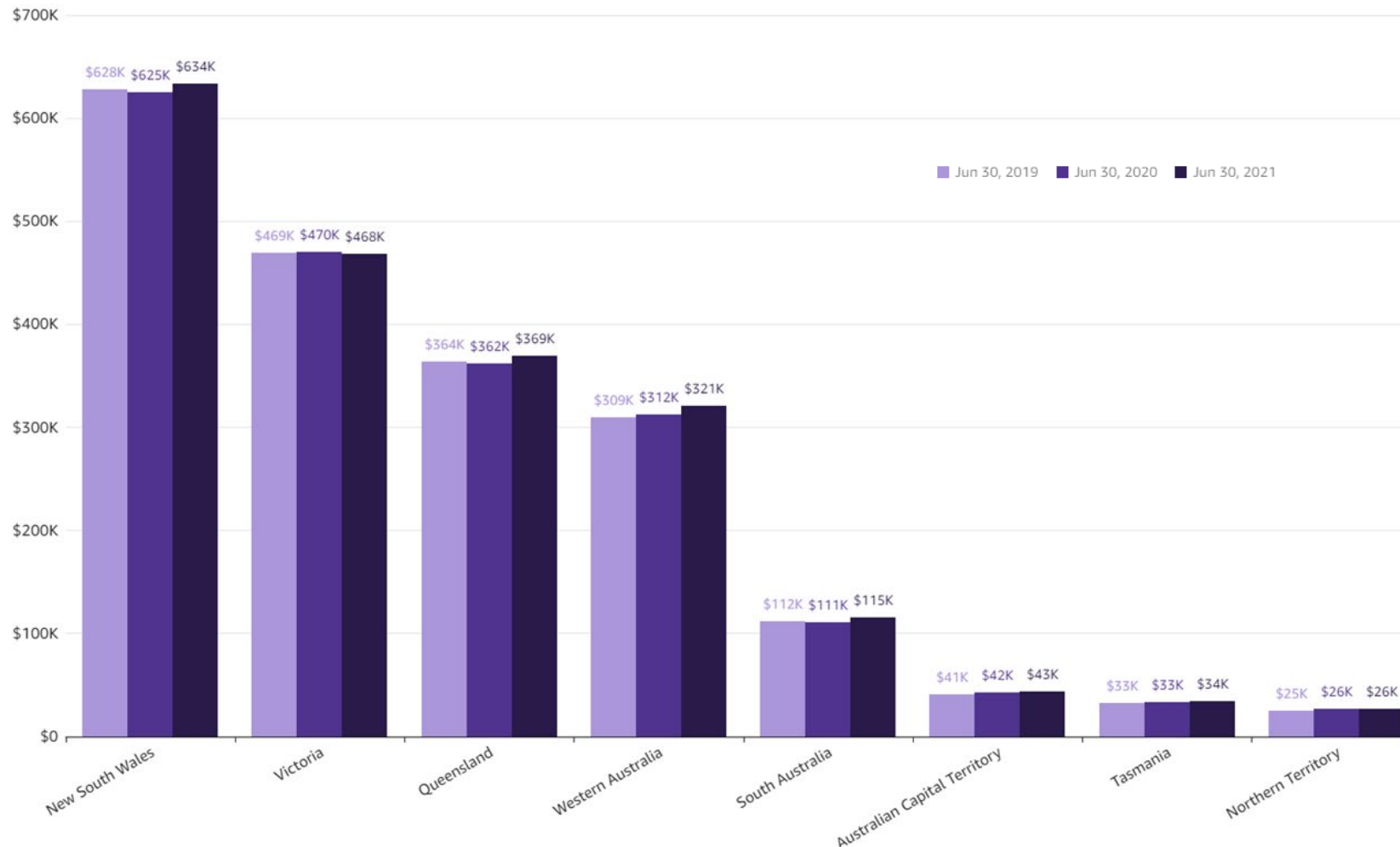
The capital city with the greatest numeric growth in employing business between 2020 and 2021 was **Brisbane** (+13,243/+14%).

The capital city with the greatest percentage growth in employing business between 2020 and 2021 was the ACT (+3,800/+15%).

City Pulse – ECONOMIC – Gross State Product

Gross State Product (\$m) – Chain Volume Measures by State / Territory

[Australian Bureau of Statistics, Australian National Accounts: State Accounts](#): Accessed 9 July 2022



Following flat growth between 2019 and 2020, Australia's economy grew by 1.5% between 2020 and 2021. The states and territories experienced the following change in GSP between 2020 and 2021:

- **South Australia** 3.9%
- **Tasmania** 3.8%
- **Australian Capital Territory** 2.8%
- **Western Australia** 2.6%
- **Queensland** 2.0%
- **New South Wales** 1.4%
- **Victoria** -0.4%
- **Northern Territory** -0.6%

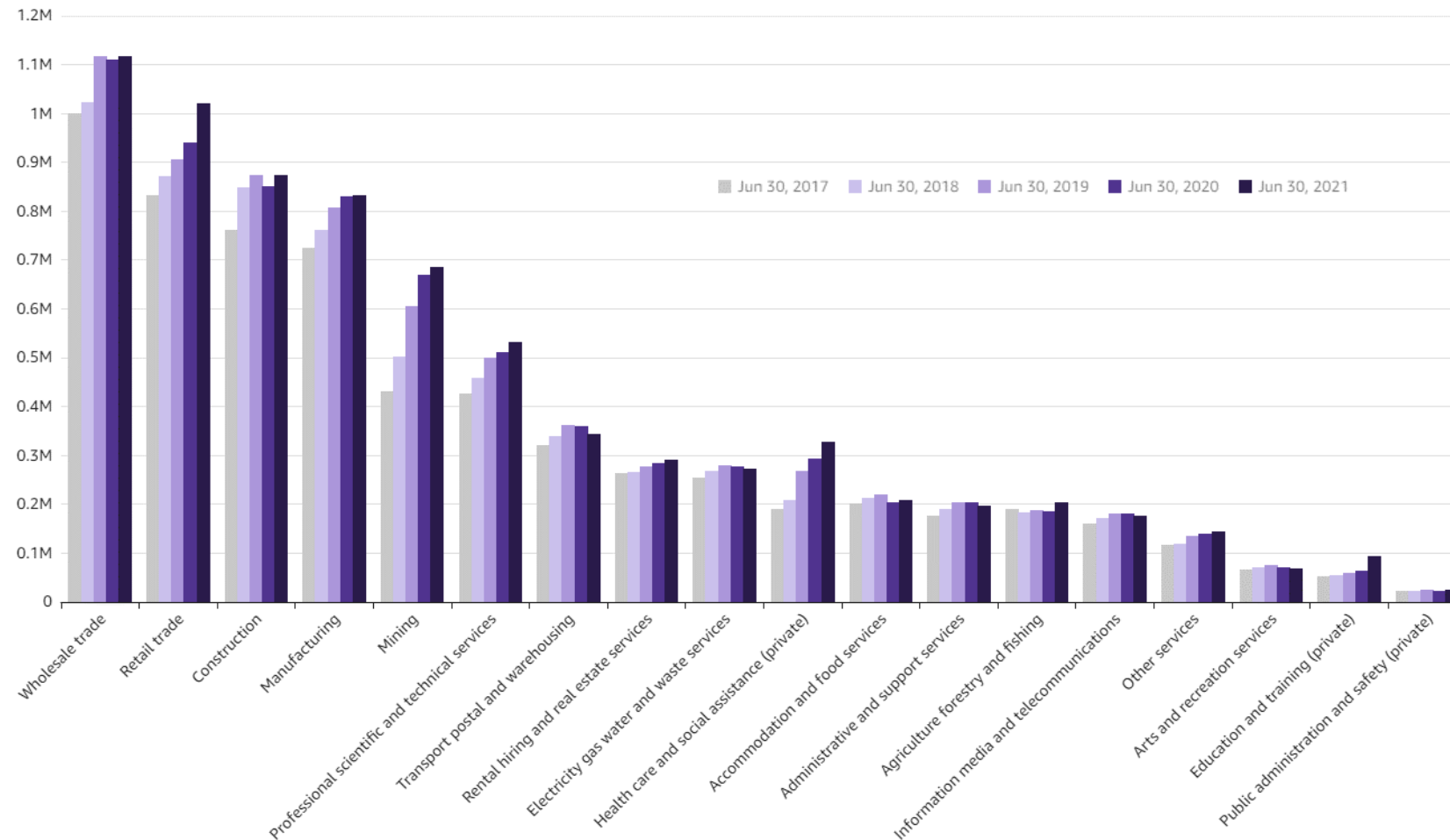
The strong growth in **South Australia** was driven by the *agriculture, forestry and fishing* sector, that experienced a -14% decline in 2019-20, followed by a rebound of 24% in 2020-21. This was a trend experienced across Australia for this sector and has been attributed to better weather and growing conditions.

In the **Northern Territory**, mining was the driver behind the contraction in 2020-21 (-12%), following strong gains in the previous year (+24%). This was due to reduced production volumes of oil and gas extraction following a fall in commodity prices.

City Pulse – ECONOMIC – Sales & Service Income

Sales and Service Income (\$m) – Australia

[Australian Bureau of Statistics, Australian Industry](#): Accessed 9 July 2022



In the ten years leading up to June 2021, the three sectors which experienced the greatest increase in sales and service income in Australia have been:

- *Mining,*
- *Retail Trade, and*
- *Construction.*

During the same period, the three sectors with the greatest percentage increase were

- *Education and Training (Private),*
- *Health and Social Assistance (Private), and*
- *Mining.*

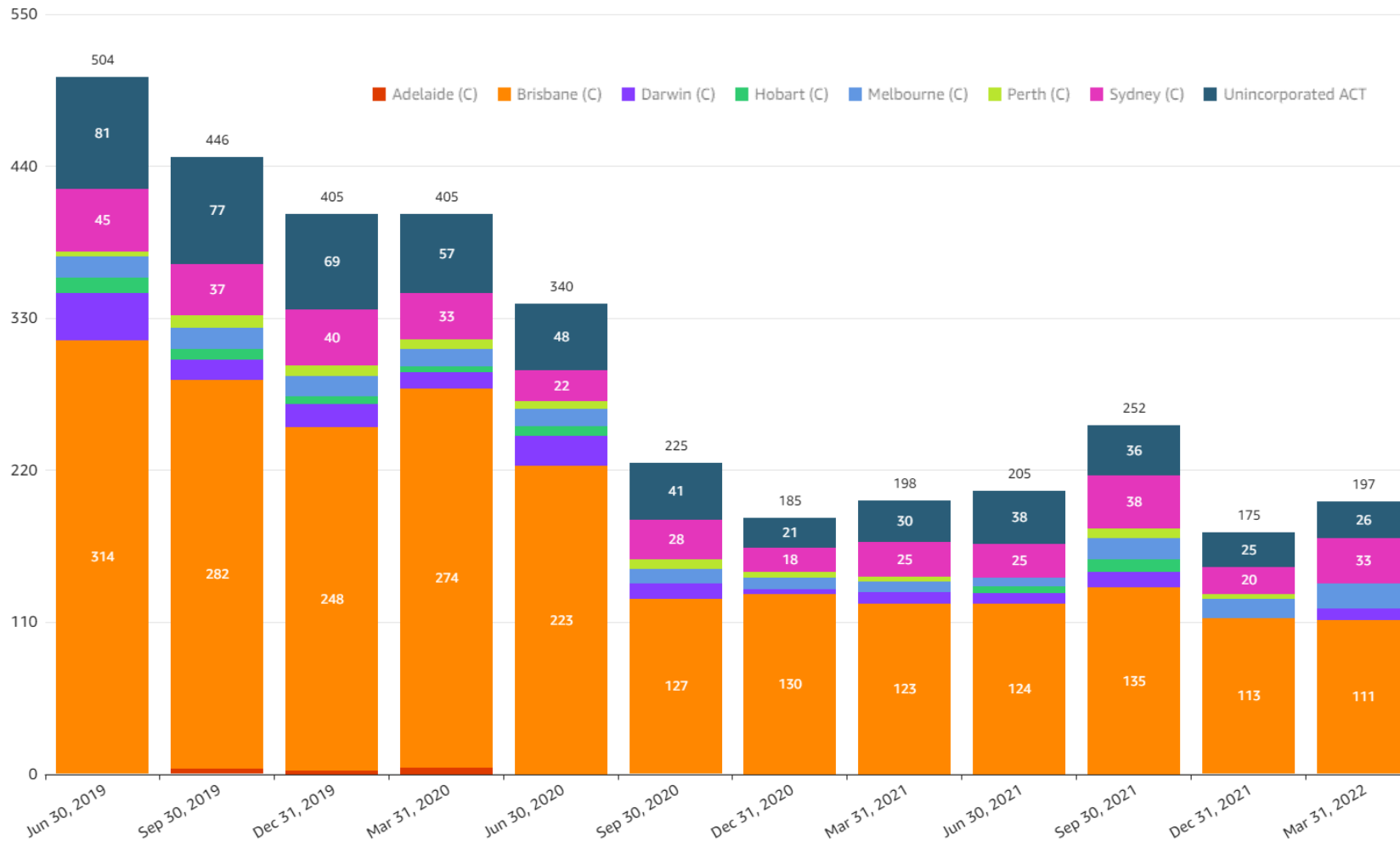
Between 2018/19 and 2019/20, *Arts and Recreation Services'* sales and service income was the sector impacted the hardest by the pandemic, with a loss of -8.8%, this was followed by a further decline of -1.9% in the 2020/21 financial year.

Accommodation and Food Services had a similar decline between June 2019 and June 2020, followed by an increase of 2.8% in the 2020/2021 financial year.

City Pulse – ECONOMIC – Personal Insolvencies

Personal Insolvencies by Local Government Area

[Australian Financial Security Authority, Personal Insolvency Statistics](#): Accessed 9 July 2022



Personal insolvencies are defined as debtors who become bankrupt or enter into a debt agreement or personal insolvency agreement.

The number of personal insolvencies in Australia's capital cities have been on a downward trajectory since the start of the COVID-19 pandemic.

In the latest quarter for which data is available (January to March 2022) there were 197 personal insolvencies registered.

The majority personal insolvencies in this quarter were reported as being business related (129), while the remainder have been recorded as not being business related (59). The data does not include corporate insolvencies.

The majority of these were in **Brisbane** (111), followed by **Sydney** (33), the ACT (26), **Melbourne** (18) and **Darwin** (9).

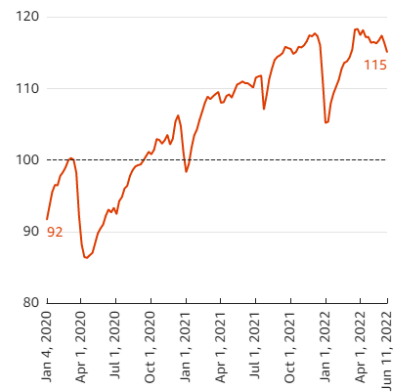
There were no personal insolvencies within **Adelaide**, **Hobart** and **Perth** during this quarter.

City Pulse – LABOUR FORCE – Employment

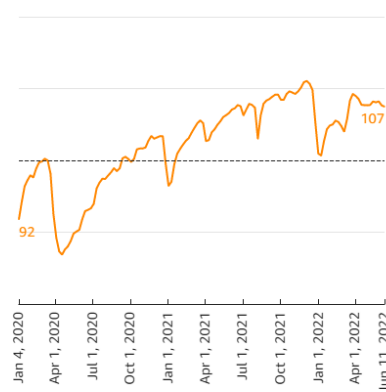
Indexed Payroll Employment by Statistical Area 3 (SA3)

[Australian Bureau of Statistics, Weekly Payroll Jobs and Wages in Australia](#): Accessed 9 July 2022

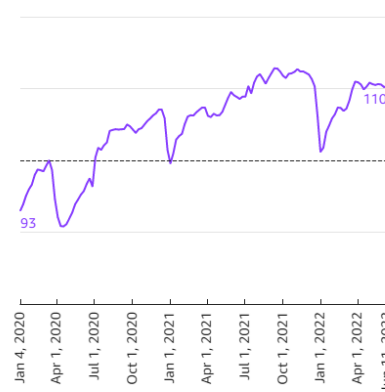
Adelaide City



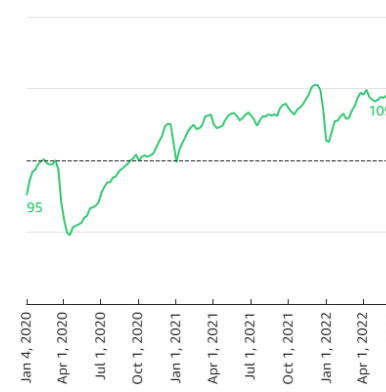
Brisbane Inner



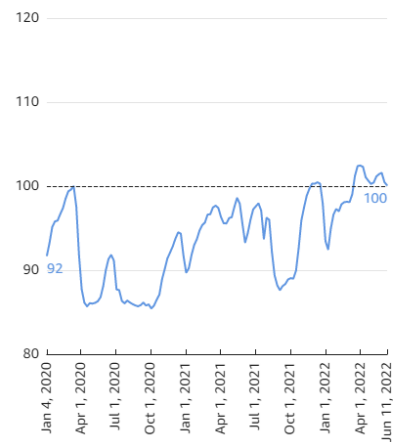
Darwin City



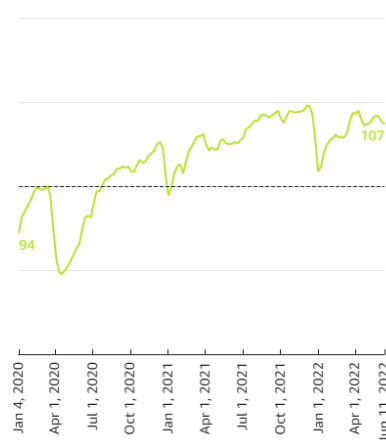
Hobart Inner



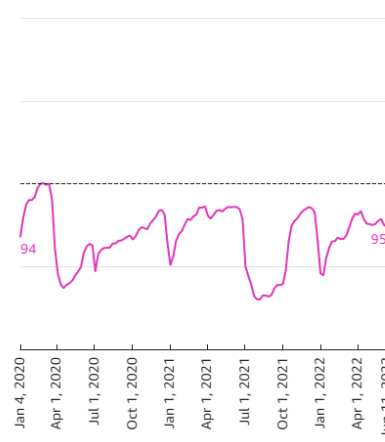
Melbourne City



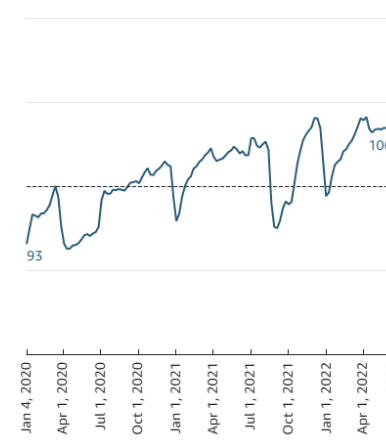
Perth City



Sydney Inner City



North Canberra



Payroll jobs as reported via Single Touch Payroll to the Australian Taxation Office. All jobholders regardless of age or residency status are included. Data is indexed to the week ending 14 March 2020 (the week of Australia's 100th coronavirus case).

On 11 June 2022, the capital city SA3s that had recorded the greatest percentage increase in payroll jobs recovery since pre-pandemic baseline week were **Adelaide** (+15%) and **Darwin** (+10%).

As the two capital cities most impacted by pandemic lockdowns, **Sydney**, continues to record payroll jobs 5% below the baseline, while **Melbourne** has also been experiencing a slower pandemic recovery having reaching March 2020 levels in the latest dataset.

Across Australia, *Health Care & Social Assistance* is the industry that has experienced the greatest rise payroll jobs since the pre-pandemic baseline (14%), followed by *Professional, Scientific and Technical Services* (+11%).

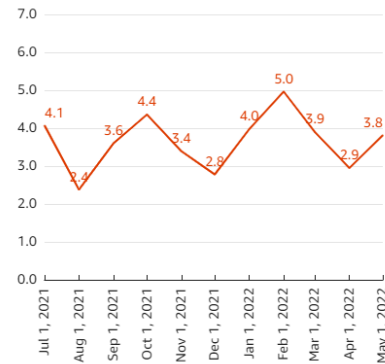
Accommodation & Food Services (-5%) and *Transport, Postal & Warehousing* (-4%) remain below pre-pandemic levels.

City Pulse – LABOUR FORCE – Unemployment

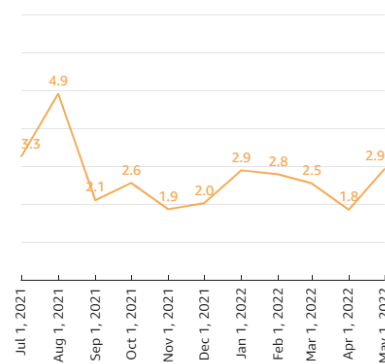
Unemployment Rate by Statistical Area 4 (SA4)

[Australian Bureau of Statistics, Labour Force, Australia, Detailed](#): Accessed 9 July 2022

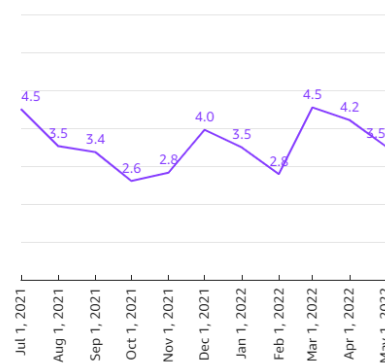
Adelaide Central and Hills



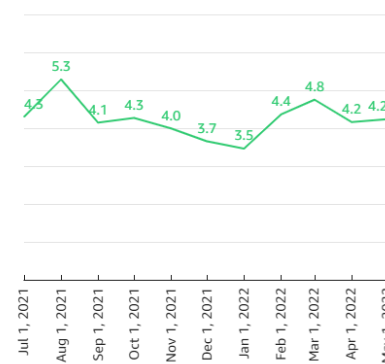
Brisbane Inner City



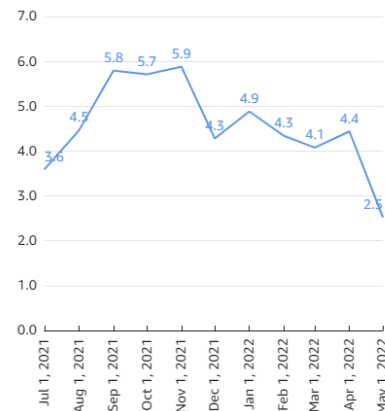
Darwin



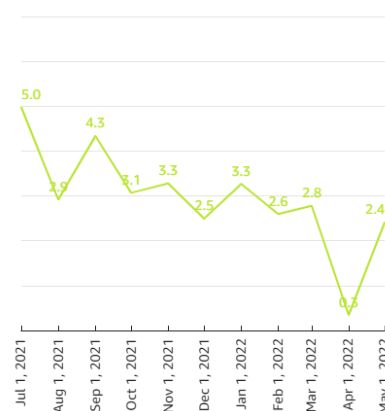
Greater Hobart (GCCSA)



Melbourne Inner



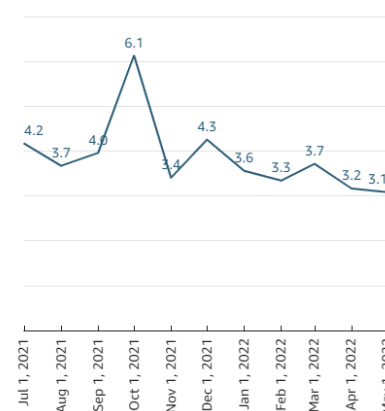
Perth Inner



Sydney - City and Inner South



Australian Capital Territory



During the pandemic, Australia's unemployment rate reached a peak in July 2020, at 7.4%. Since that date, it has been on a steady decline and, on 1 May, the unemployment rate across Australia was just 3.8%; the lowest it has been since July 2008.

The most recent data from 14 May shows that **Perth – Inner** is the capital city SA4 with the lowest employment rate (2.4%), followed closely by **Melbourne – Inner** (2.5%).

Adelaide – Central and Hills (3.8%) and **Darwin** (3.5%) have the highest unemployment rates, although these are still on par with or below the national unemployment rate.

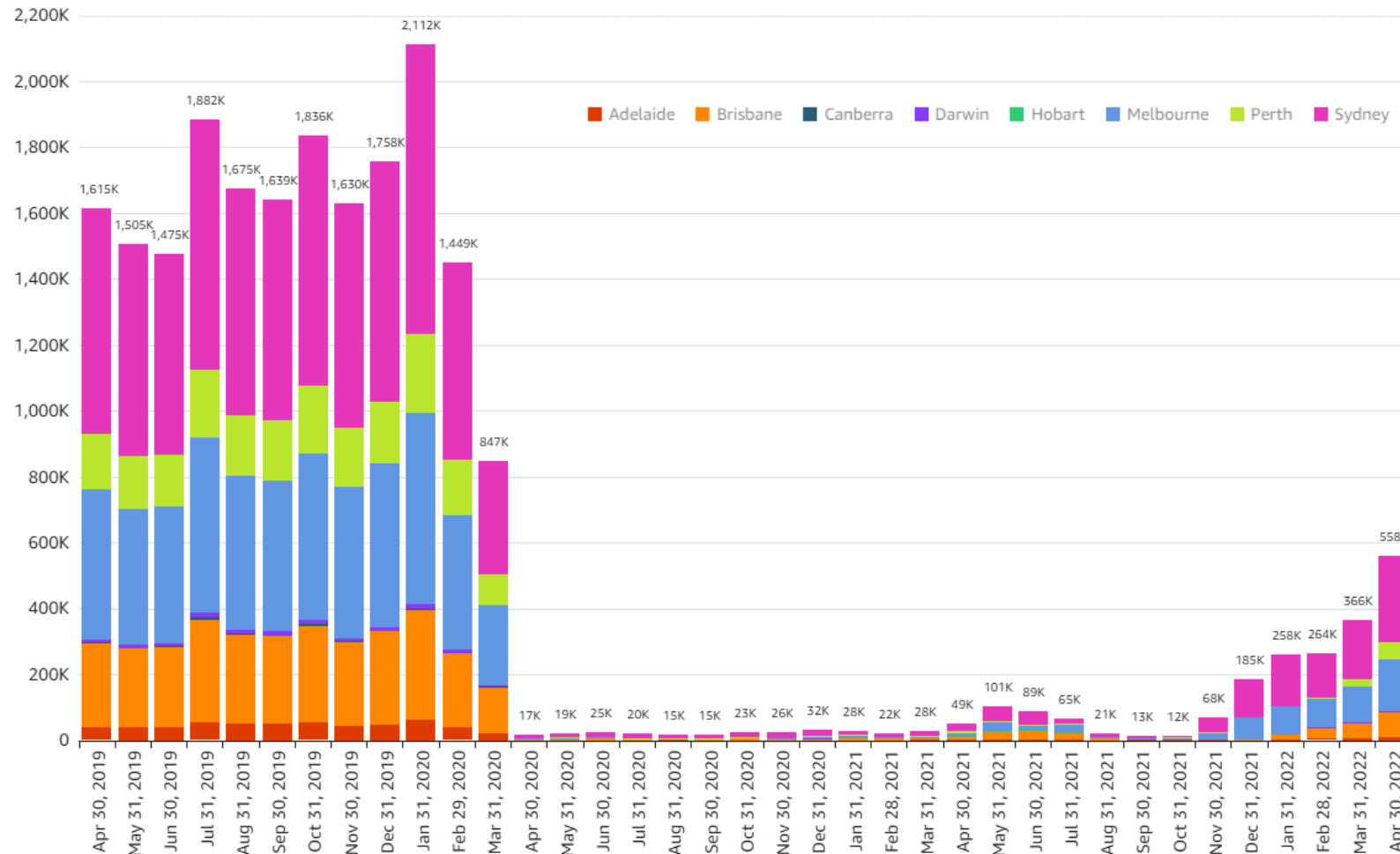
The low unemployment rates have been creating [staff shortages](#) for many businesses. Almost one third of businesses surveyed in June 2022 reported difficulties finding suitable staff. These difficulties were most common among large (66%) and medium (62%) sized businesses. A smaller proportion of small business reported challenges (29%), however, almost half (46%) of these small business reported that the staffing difficulties were impacting their business to a great extent.

*The ABS do not publish Hobart SA3 unemployment data and so Greater Hobart Greater Capital City Statistical Area (GCCSA) is shown instead.

City Pulse – MOBILITY – Airport Passengers

Inbound International Airlines Revenue Passengers by City

[Bureau of Infrastructure and Transport Research Economics, Airport Traffic Data](#): Accessed 9 July 2022



In the latest airport traffic data from April 2022 shows that while inbound international passenger numbers are increasing, they remain still well below pre-pandemic levels. In April 2022, there were just 558k inbound passengers; almost two thirds less April 2019 (1,615k).

In April 2022, almost half (47%) of international passengers to the capitals arrived in **Sydney**, followed by **Melbourne** (28%) and **Brisbane** (13%). This compared to 41%, 28% and 16% respectively in April 2019.

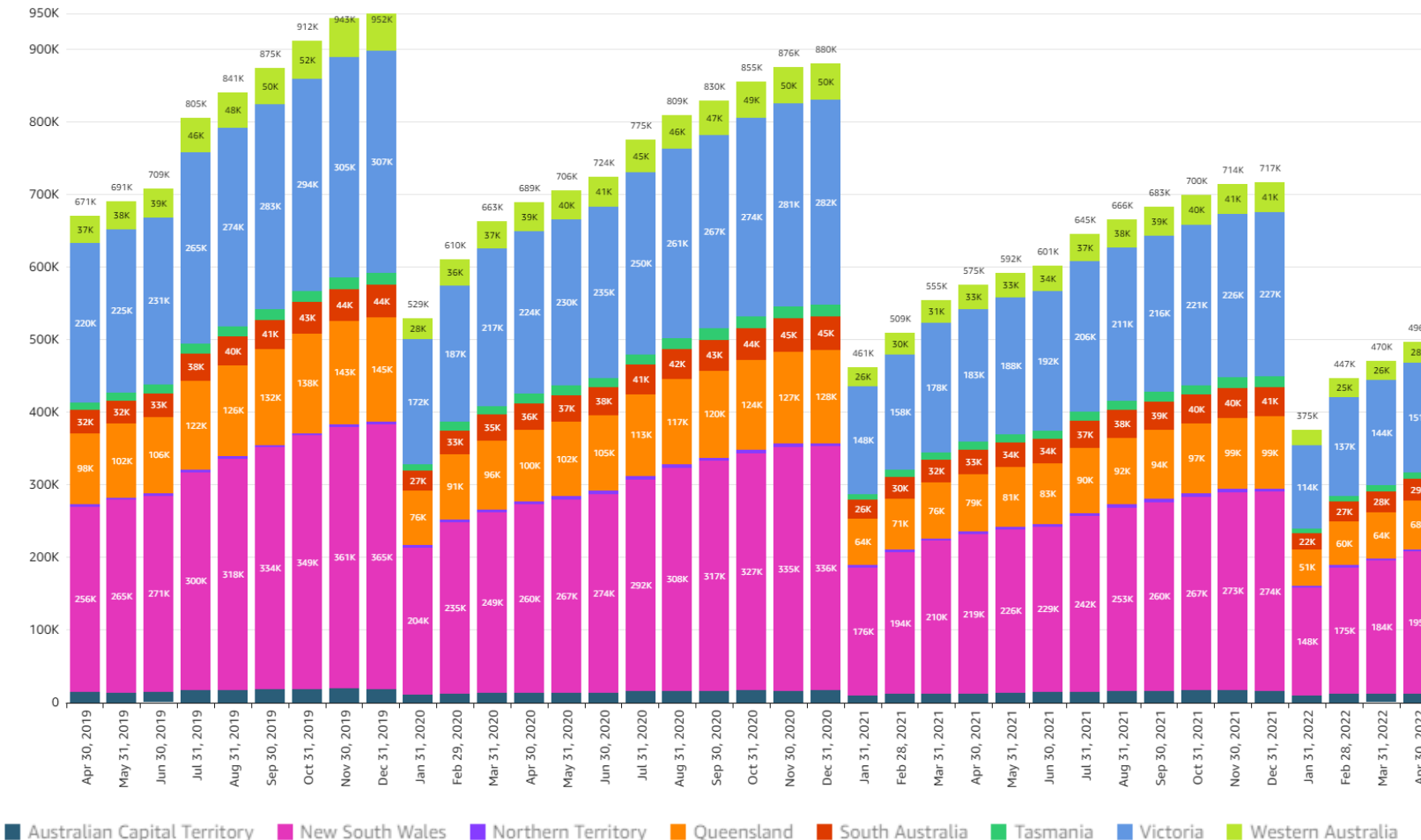
As might be expected, domestic and regional inbound passengers have made more gains towards recovery. In April 2022, there were 3.44m inbound domestic and regional passengers, compared to 3.95m in April 2019.

In April 2022, 29% of domestic and regional passengers to the capitals arrived in **Melbourne**, followed by **Sydney** (28%) and **Brisbane** (20%). **Hobart** has made the most progress towards pre-pandemic levels (-1% in April 2022 compared to April 2019), followed by **Darwin** (-4%).

City Pulse – MOBILITY – International Students

International Student Enrolments by State / Territory

[Australian Trade and Investment Commission, Education Data](#): Accessed 9 July 2022



At the height of the pandemic, international borders were closed, and international students were unable to travel to Australia, impacting the number of student enrolments (including students from schools, Vocational Education, Higher Education and ELICOS).

In April 2022, there were 496k international students enrolled and studying courses in Australia, compared to 671k in April 2019; a fall of -174,800 / -26%.

In April 2022, most students were studying in **New South Wales** (39%) and **Victoria** (30%).

Most international students enrolled in courses in March 2022 were in higher education (56%), followed by Vocational Education and Training (VET) (37%). The ACT has a particularly high proportion of its international students in higher education (68%) while in **Tasmania**, 58% of international students are in VET courses.

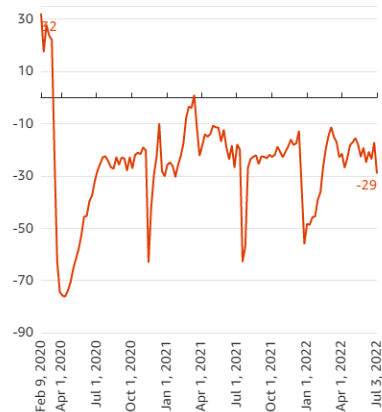
Most international students in Australia are from China (27%), followed by India (17%). Chinese students are most likely to be studying higher education courses (84%) and Indian students are most likely to be studying VET courses (55%).

City Pulse – MOBILITY – Retail/Recreation Visits

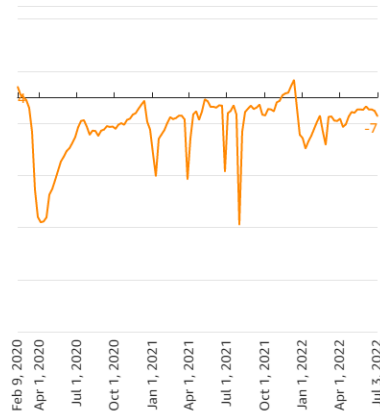
Indexed Retail and Recreation Mobility by Local Government Area

[Google, Global Mobility Reports](#): Accessed 9 July 2022

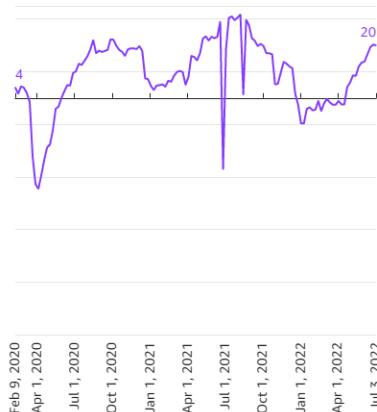
Adelaide City



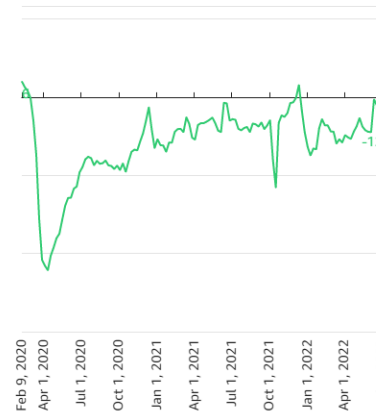
Brisbane



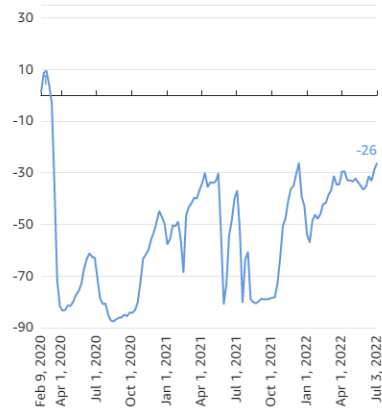
Darwin



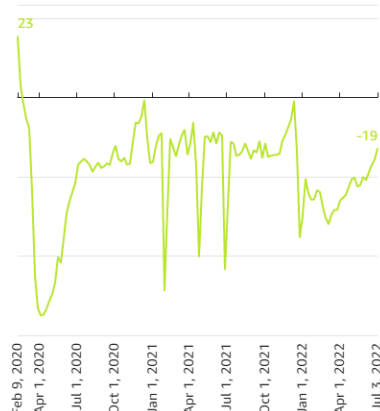
Hobart



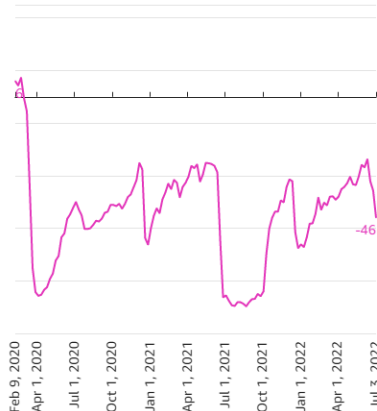
Melbourne



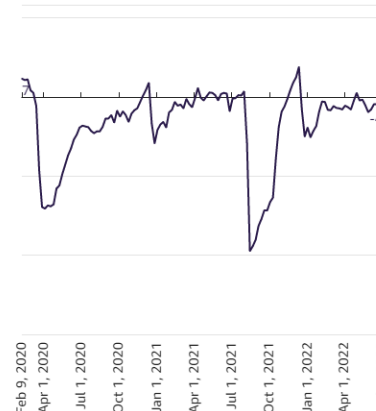
Perth



Sydney



ACT



Since the beginning of the pandemic, Google has been providing data on the number of people visiting retail and recreation sites around the world. These sites were particularly hard-hit during the pandemic, with large falls in visitor numbers.

In Australia, the greatest drop was experienced in **Melbourne** (-88% in September 2020), followed by **Perth** in April 2020 (-82%) and **Sydney** in September 2021 (-80%).

The latest data from week of 3 July 2022 shows that **Darwin** has had the greatest recovery within these spaces (+20%), followed by **the ACT** (-4%) and **Brisbane** (-7%).

In most states and territories the Google data suggests that fewer people are using public transport, although there are some signs of recovery. The exception to this is in **Darwin**, where visits to transit stations are +5% above the pre-pandemic baseline at 3 July, while **Melbourne** remains -49% below.

On the other hand, people are continuing to stay at and work from home, with 13% more people in both **Sydney** and 8% in **Melbourne** at home when compared to the pre-pandemic baseline.

City Pulse – APPENDIX

About this report

In response to a query from the Capital City Lord Mayors in late 2020 about tracking the economic impact of the pandemic, the Council of Capital City Lord Mayors (CCCLM) and its Economic Development Working Group collaborated to initiate the City Pulse project. The aim of the project is to inform decision making that supports Australian people and businesses during the COVID-19 economic response and recovery.

From April 2021, a selection of key datasets have been acquired, prepared, and shared via the CCCLM City Pulse AWS S3 Bucket and City Pulse SharePoint site, in a format that can be easily read by data visualisation software. These datasets are updated on a regular basis and available for use by all capital city council until at least March 2023. The City Pulse data can be used to track recovery and provides cities with an opportunity to benchmark against each other across key metrics.

This report draws on some of the data contained within the City Pulse portals. Quarterly updates of this report will be provided to the capital cities in July 2022, October 2022, January 2023 and April 2023.

Notes on the data and sources

- Charts in this report have been created in AWS QuickSight using the CCCLM City Pulse AWS S3 Bucket
- Links to the original source datasets are provided on each slide
- Where possible, data has been provided at a Local Government Area (LGA) geographic level. In many cases, data is not published for this geography and so the federal, state/territory, Statistical Area 3 (SA3) or Statistical Area 4 (SA4) level data has been provided in its place. To view maps that show the geographic coverage of the locations selected for each city, please see the Australian Bureau of Statistics' Maps webpage: <https://maps.abs.gov.au/>

© Council of Capital City Lord Mayors 2022