

# City Pulse | Quarterly Report | October 2022



SYDNEY



ADELAIDE



MELBOURNE



BRISBANE



DARWIN



PERTH



HOBART



CANBERRA

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 Denotes that new data **has** been published since the July 2022 report

 Denotes that new data **has not** been published since the July 2022 report

# Summary

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## Personal insolvencies continue to trend downwards

- There were 164 personal insolvencies in the capital cities in the April-June 2022 quarter, compared to 197 in the previous quarter

## Payroll jobs are higher than pre-pandemic in all but one capital city

- **Sydney** remains -2% below pre-pandemic levels, while **Adelaide** is (+16%) has the highest levels since pre-pandemic

## Unemployment rates remain at historic lows

- **Hobart** has the highest unemployment rate (5.5%), while **Sydney** has the lowest (1.6%)

## Inbound airport passenger numbers continue to recover but remain lower than pre-pandemic

- In July 2022 there were -44% international and -13% fewer regional and domestic inbound passengers compared to July 2019

## The number of international students in Australia is -25% lower than pre-pandemic

- **Victoria** has -31% fewer international students in July 2022 than in July 2019
- **New South Wales** has -22% fewer international students in July 2022 than in July 2019

## The lingering impact of the pandemic on people's behaviours continues to be highlighted in mobility data

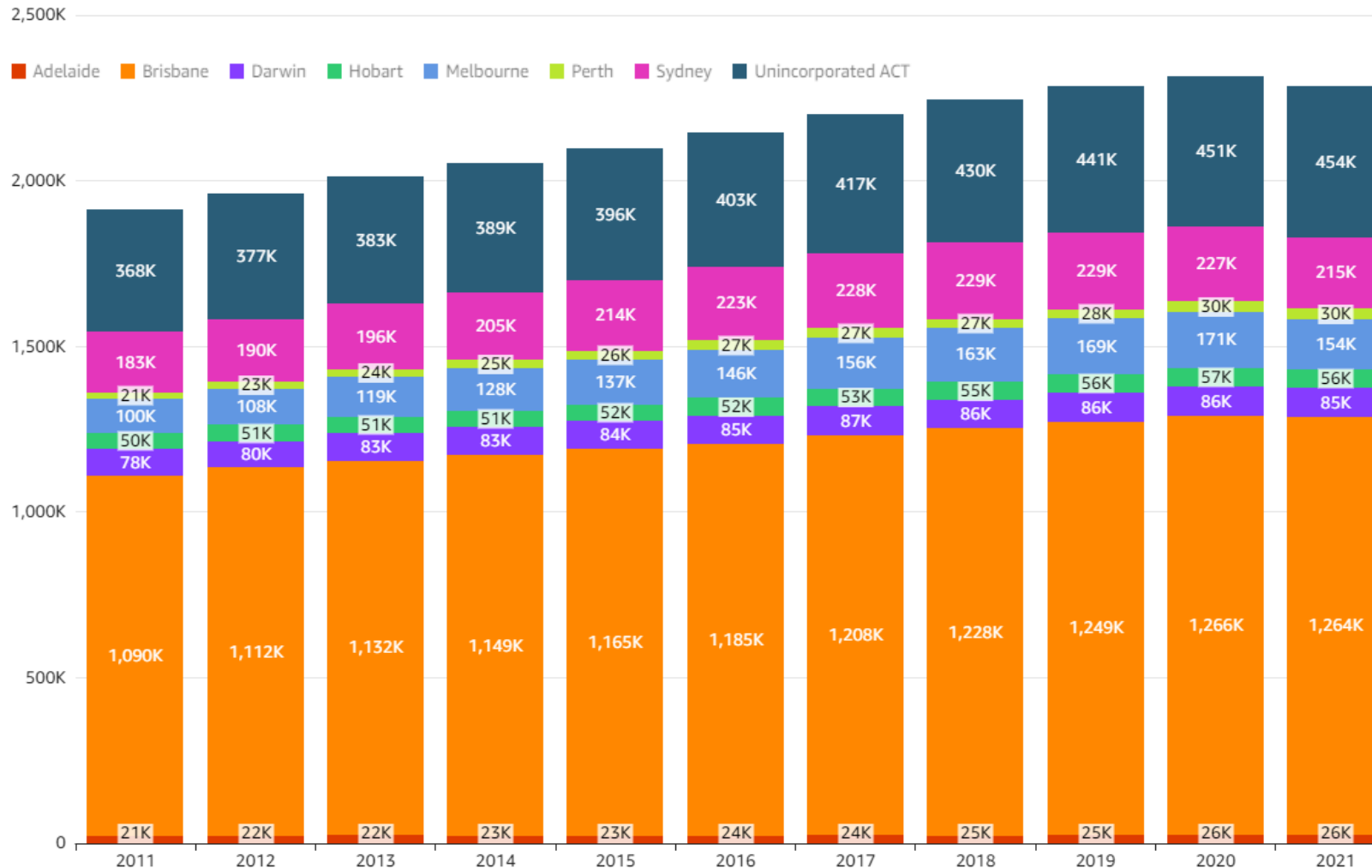
- The number of visits to retail & recreation, transit station and work locations remains lower than the pre-pandemic baseline
- At the same time, a higher number of people can be found in residential locations than pre-pandemic

# City Pulse – POPULATION



## Total Population by Capital City Local Government Area

[Australian Bureau of Statistics, Regional Population](#): Accessed 8 October 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, as of 30 June 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 19%, growing from 1.9 million to 2.3 million. **Melbourne** experienced the greatest percentage growth in population across this time period (+53%), followed by **Perth** (+39%), **the ACT** (+23%) and **Adelaide** (+22%).

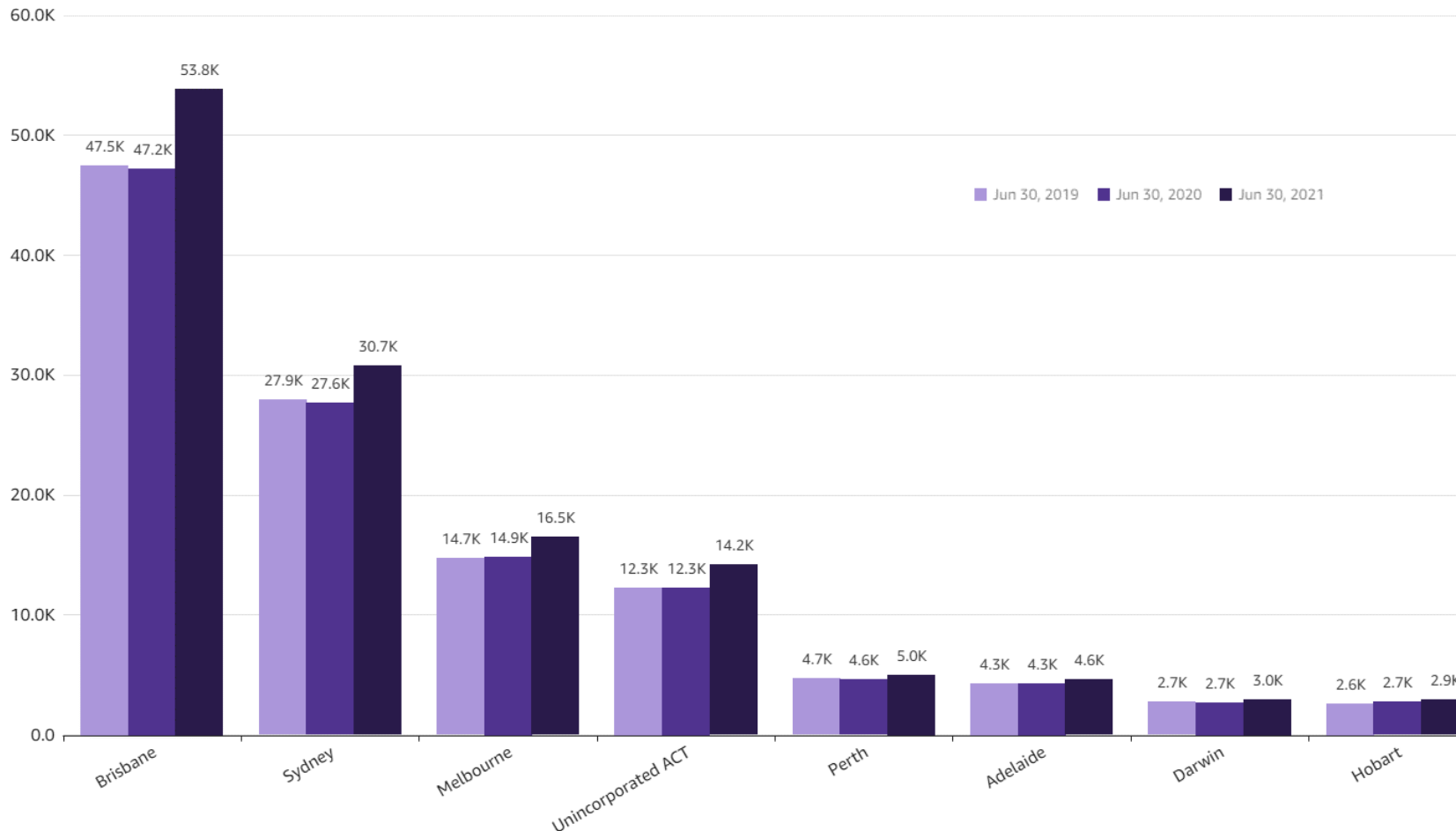
Following the onset of the pandemic, the population in Australia's capital cities fell by 1.3% between 2020 and 2021. The cities with the greatest falls in residential population between 2020 and 2021 were **Melbourne** (-10% / -17,000), **Sydney** (-5% / -12,000) and **Hobart** (-1.8% / -500). During the same period, **the ACT** experienced a small increase (+0.6% / +3,000).

# 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 8 October 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%).

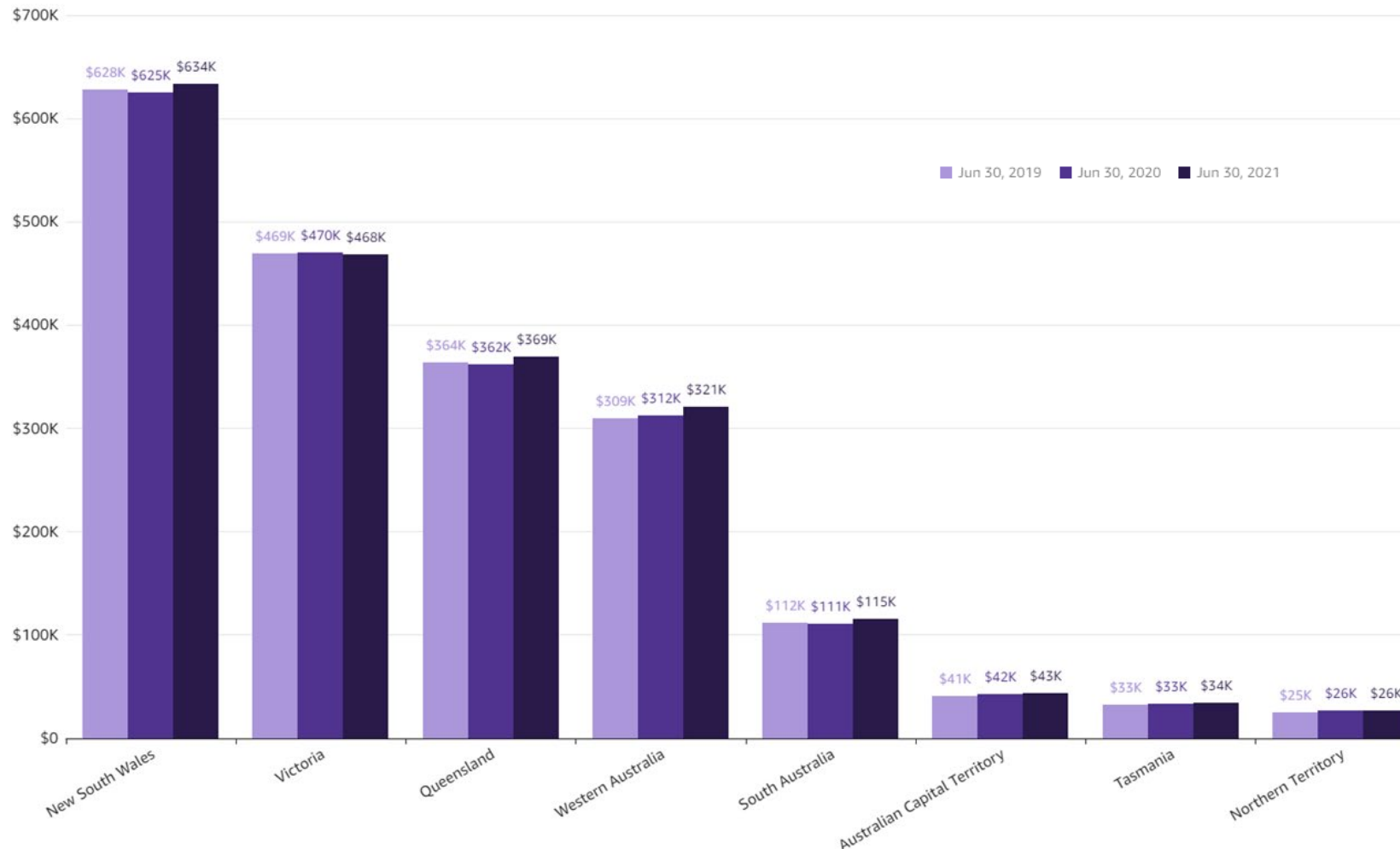


# City Pulse – ECONOMIC – Gross State Product



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

[Australian Bureau of Statistics, Australian National Accounts: State Accounts](#): Accessed 8 October 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.

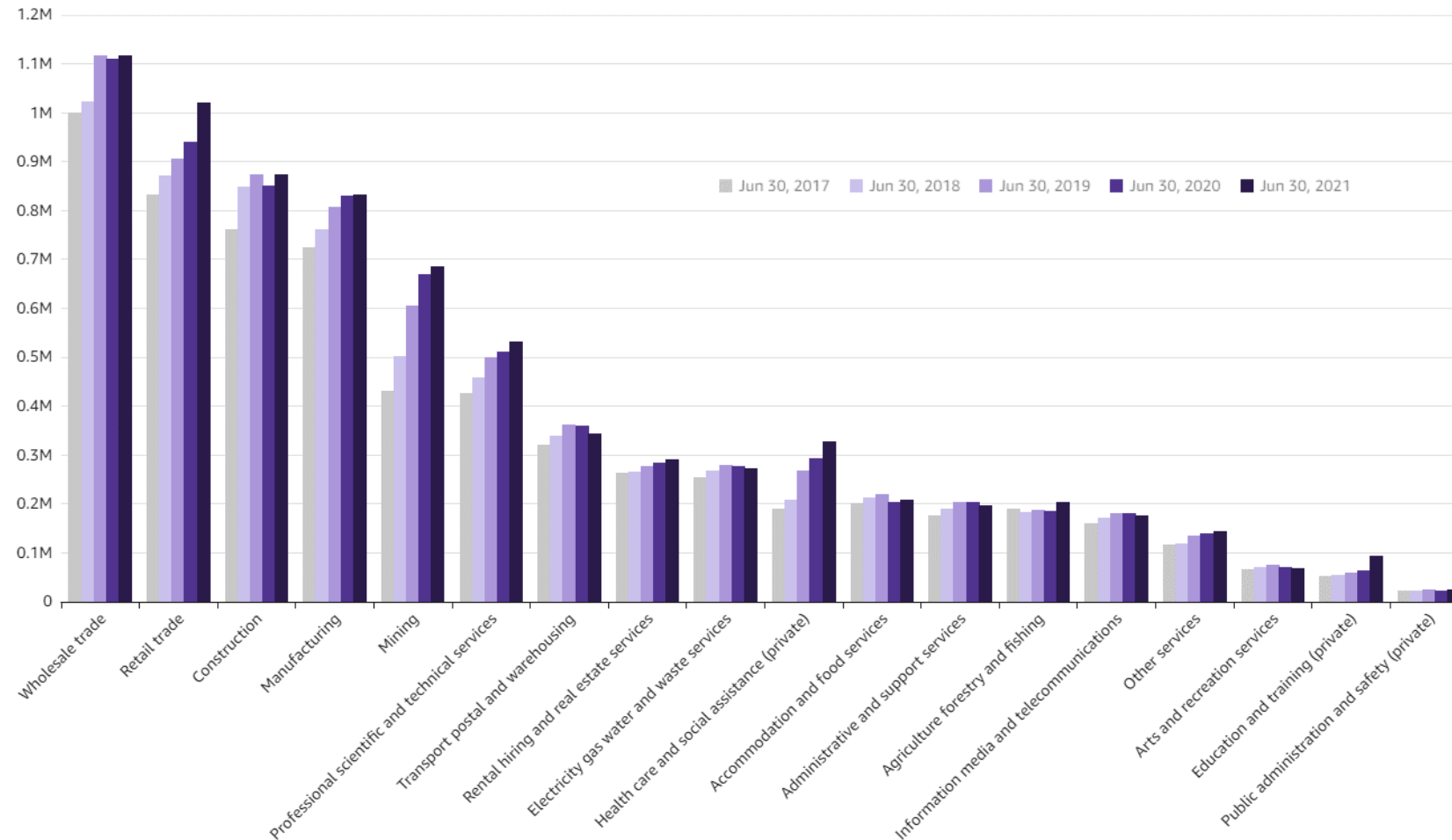
In the **Northern Territory**, mining was the driver behind the contraction in 2020-21 (-12%), following strong gains in the previous year (+24%). This was due to reduced production volumes of oil and gas extraction following a fall in commodity prices.

# City Pulse – ECONOMIC – Sales & Service Income



## Sales and Service Income (\$m) – Australia

[Australian Bureau of Statistics, Australian Industry](#): Accessed 8 October 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.

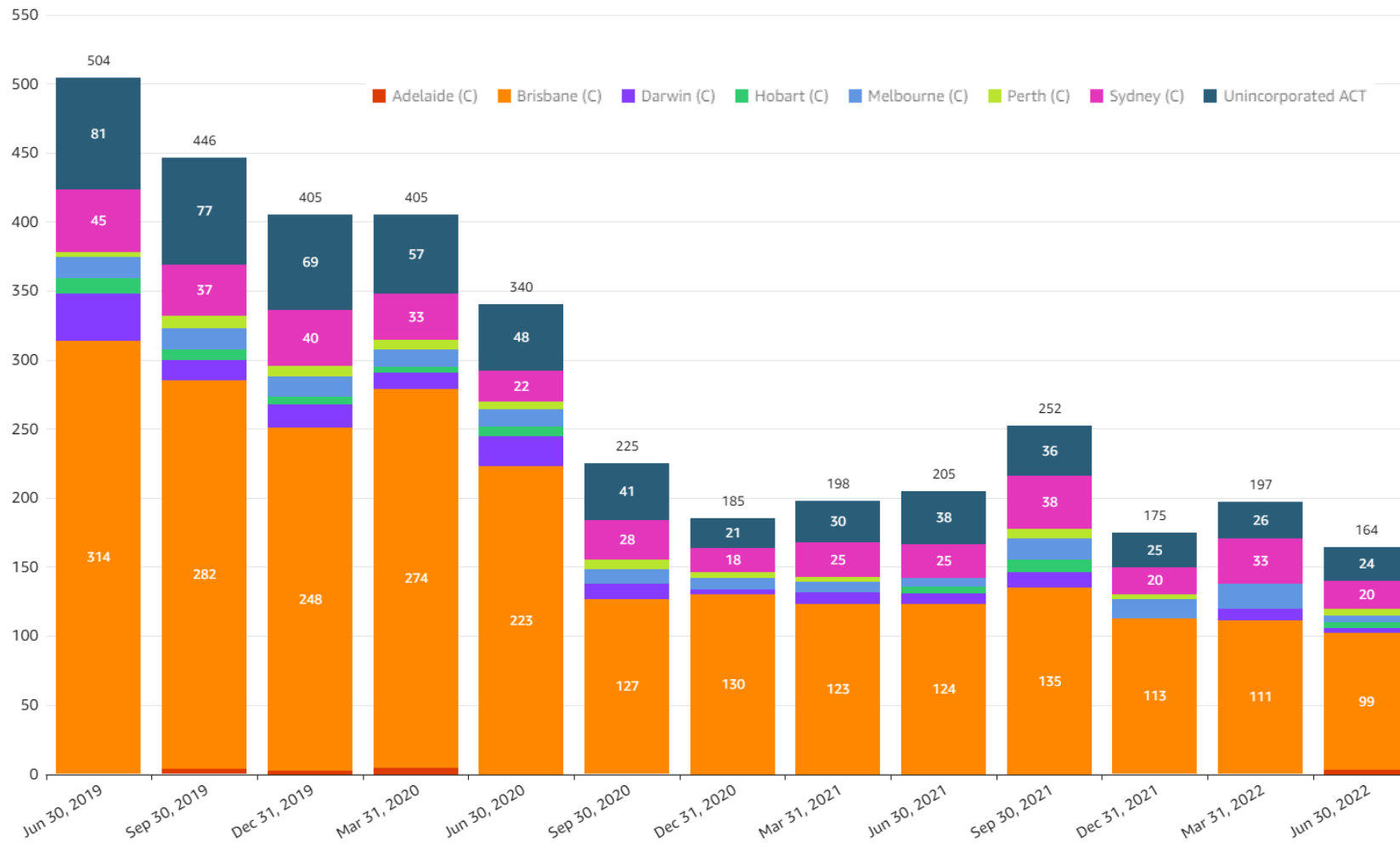
*Accommodation and Food Services* had a similar decline between June 2019 and June 2020, followed by an increase of 2.8% in the 2020/2021 financial year.

# City Pulse – ECONOMIC – Personal Insolvencies



## Personal Insolvencies by Local Government Area

[Australian Financial Security Authority, Personal Insolvency Statistics](#): Accessed 8 October 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 (April to June 2022) there were 164 personal insolvencies registered. This is lower than the previous quarter (197).

In the April to June quarter 2022, the majority of personal insolvencies were recorded in **Brisbane** (99), followed by **Sydney** (20) and **the ACT** (24).

All other cities recorded five or less personal insolvencies.



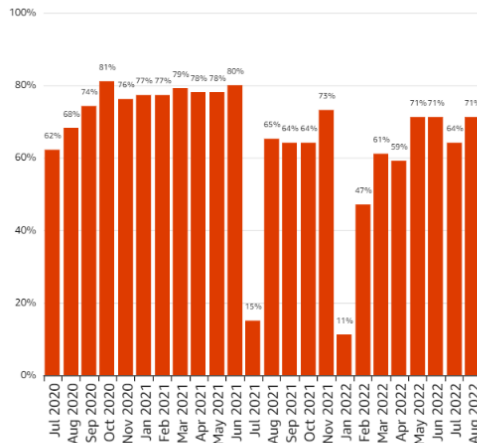
# City Pulse – ECONOMIC – Office Occupancy



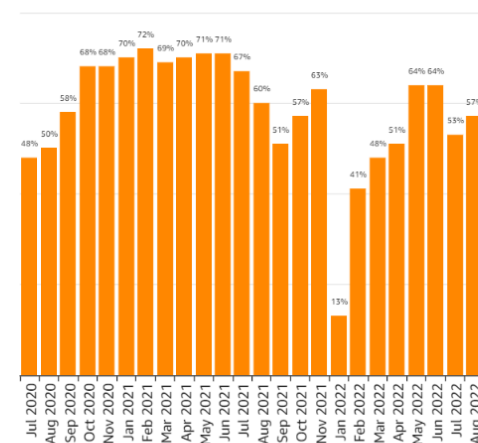
## Levels of occupancy in office buildings as a percentage of the pre-pandemic rate by city

[Property Council of Australia](#): Accessed 12 October 2022

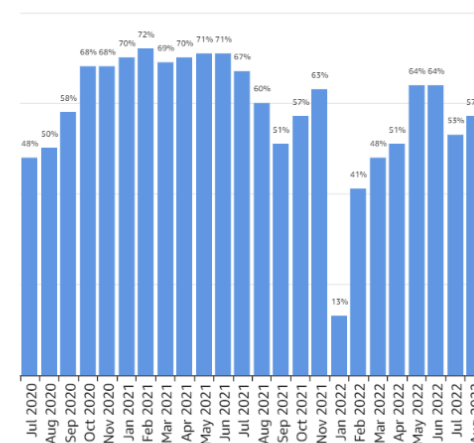
Adelaide



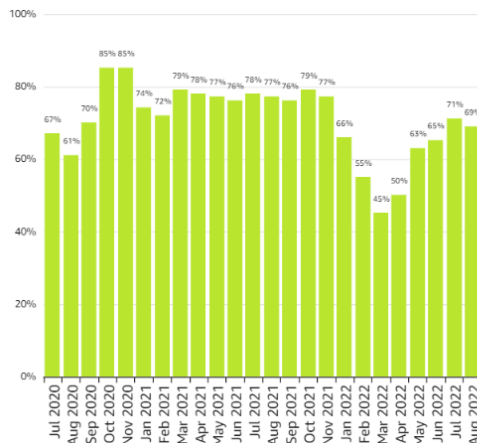
Brisbane



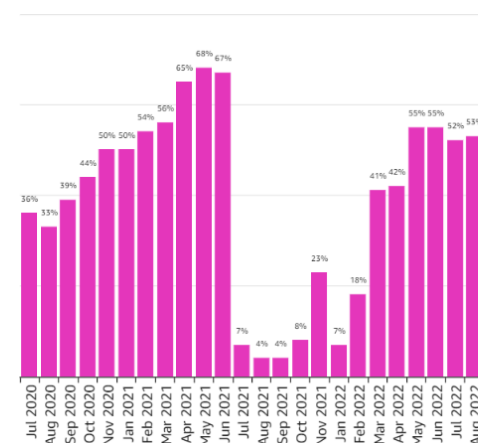
Melbourne



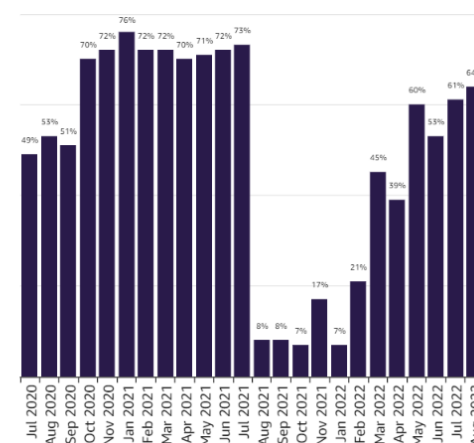
Perth



Sydney



Canberra



Pandemic lockdowns and restrictions led to more people working from home. This resulted in lower office occupancy rates across Australia's capital cities\*.

In August 2022, the Property Council of Australia's occupancy survey showed that the city with the highest post-pandemic occupancy rate was **Adelaide** (71%), while the lowest was **Sydney** (53%).

**Sydney** and **Canberra** experienced periods of particularly low office occupancy from mid-2021, but have made good progress towards recovery since then.

The Transport Opinion Survey conducted by the University of Sydney's Institute of Transport and Logistics Studies found that in September 2022, Australians spent 26% of their working time at home. This compares to 43% in March 2022, indicating a return to the office. In September 2022, people in **South Australia** spent the least time working from home (17% of working time) while people in **New South Wales** spent the most time working from home (31%). These findings are in line with office occupancy rate data.

\*Data for Hobart and Darwin was not available for this report

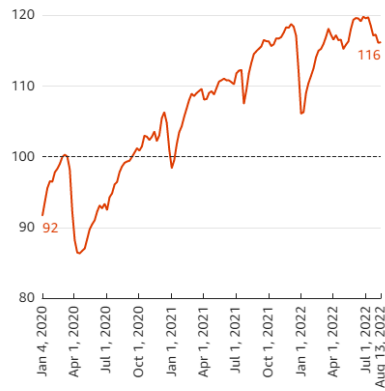
# City Pulse – LABOUR FORCE – Employment



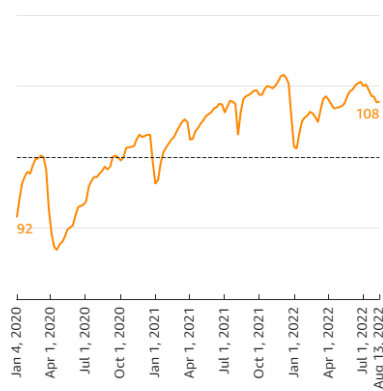
## Indexed Payroll Employment by Statistical Area 3 (SA3)

[Australian Bureau of Statistics, Weekly Payroll Jobs and Wages in Australia](#): Accessed 8 October 2022

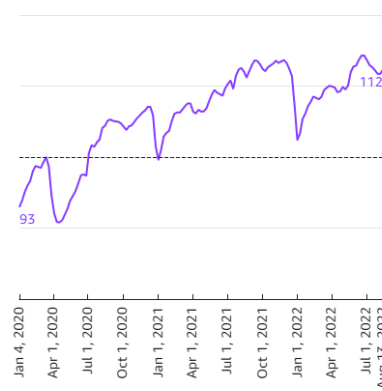
Adelaide City



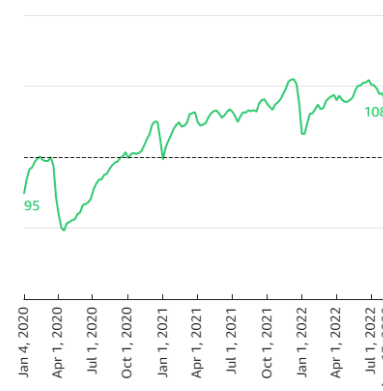
Brisbane Inner



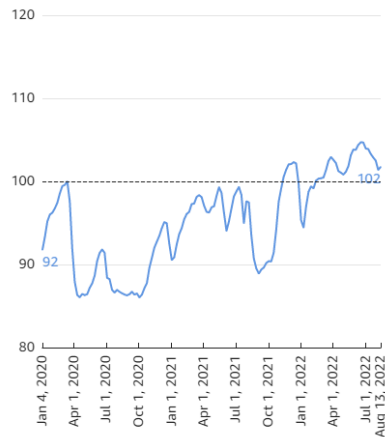
Darwin City



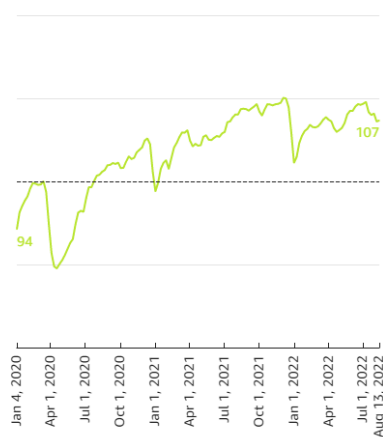
Hobart Inner



Melbourne City



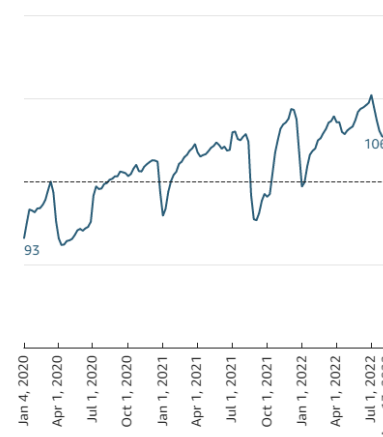
Perth City



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.

On 13 August 2022, the capital city SA3s that recorded the greatest percentage increase in payroll jobs recovery since pre-pandemic baseline week were **Adelaide** (+16%) and **Darwin** (+12%).

**Sydney** (-4%) is the only capital city continuing to record payroll jobs below the pre-pandemic baseline, while **Melbourne's** payroll jobs are just above pre-pandemic levels (+2%).

All capital city areas experienced a peak in payroll employment around the end of June/early July 2022, followed by a small decline between that point and 13 August 2022.

Across Australia, *Health Care & Social Assistance* is the industry that has experienced the greatest rise payroll jobs since the pre-pandemic baseline (+15%), followed by *Professional, Scientific and Technical Services* (+13%). *Accommodation & Food Services* (-3%) and *Transport, Postal & Warehousing* (-3%) remain below pre-pandemic levels.

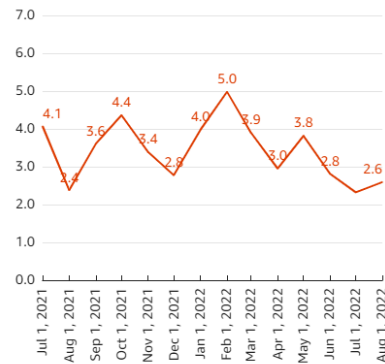
# City Pulse – LABOUR FORCE – Unemployment



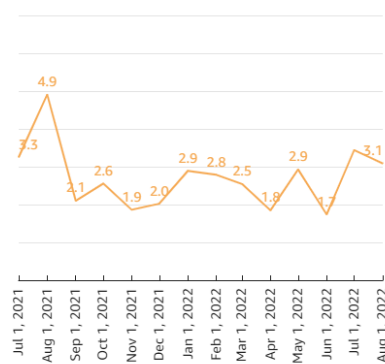
## Unemployment Rate by Statistical Area 4 (SA4)

[Australian Bureau of Statistics, Labour Force, Australia, Detailed](#): Accessed 8 October 2022

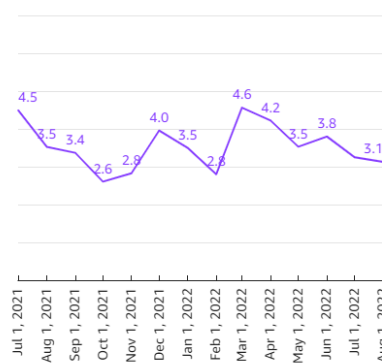
Adelaide Central and Hills



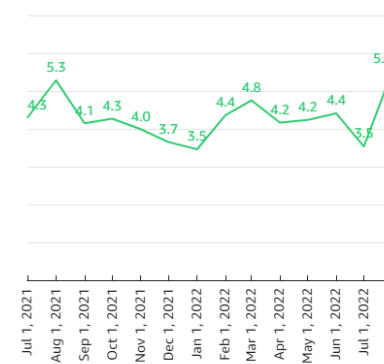
Brisbane Inner City



Darwin



Greater Hobart (GCCSA)



During the pandemic, Australia's unemployment rate reached a peak of 7.4% in July 2020. Since that date, it has been on a steady decline and, on 1 August 2022, the unemployment rate across Australia was just 3.5%.

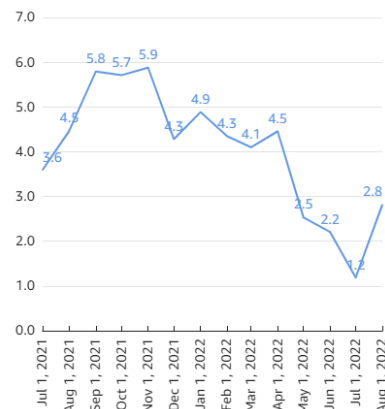
The most recent data shows that on 1 August 2022 **Sydney** is the capital city SA4 with the lowest employment rate (1.6%), followed closely by **Perth Inner** (1.7%).

**Greater Hobart GCCSA** (5.5%) has the highest unemployment rate; an increase from 3.5% on 1 July 2022.

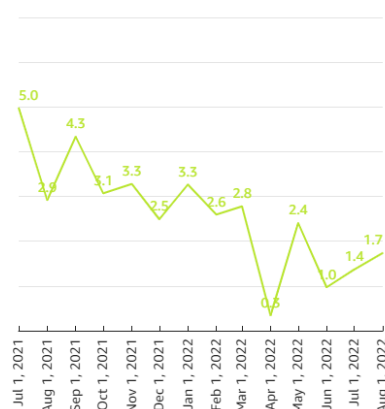
The low unemployment rates continue to contribute to [high job vacancy rates](#). This is particularly evident in the, following sectors, which have all experienced particularly large percentage increases in job vacancies between February 2020 and August 2022:

- *Accommodation and Food Services* (+300%)
- *Arts and Recreation Services* (+232%)
- *Renting, Hiring and Real Estate Services* (+217%)

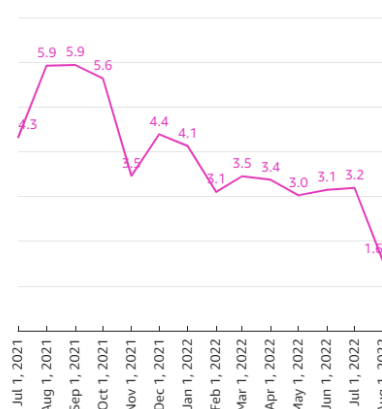
Melbourne Inner



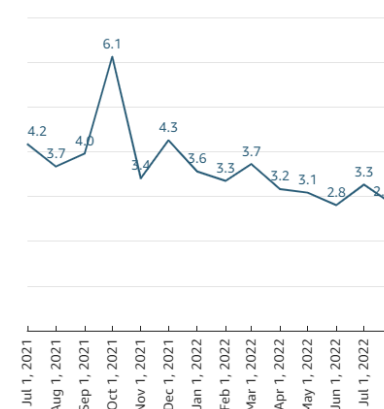
Perth Inner



Sydney - City and Inner South



Australian Capital Territory



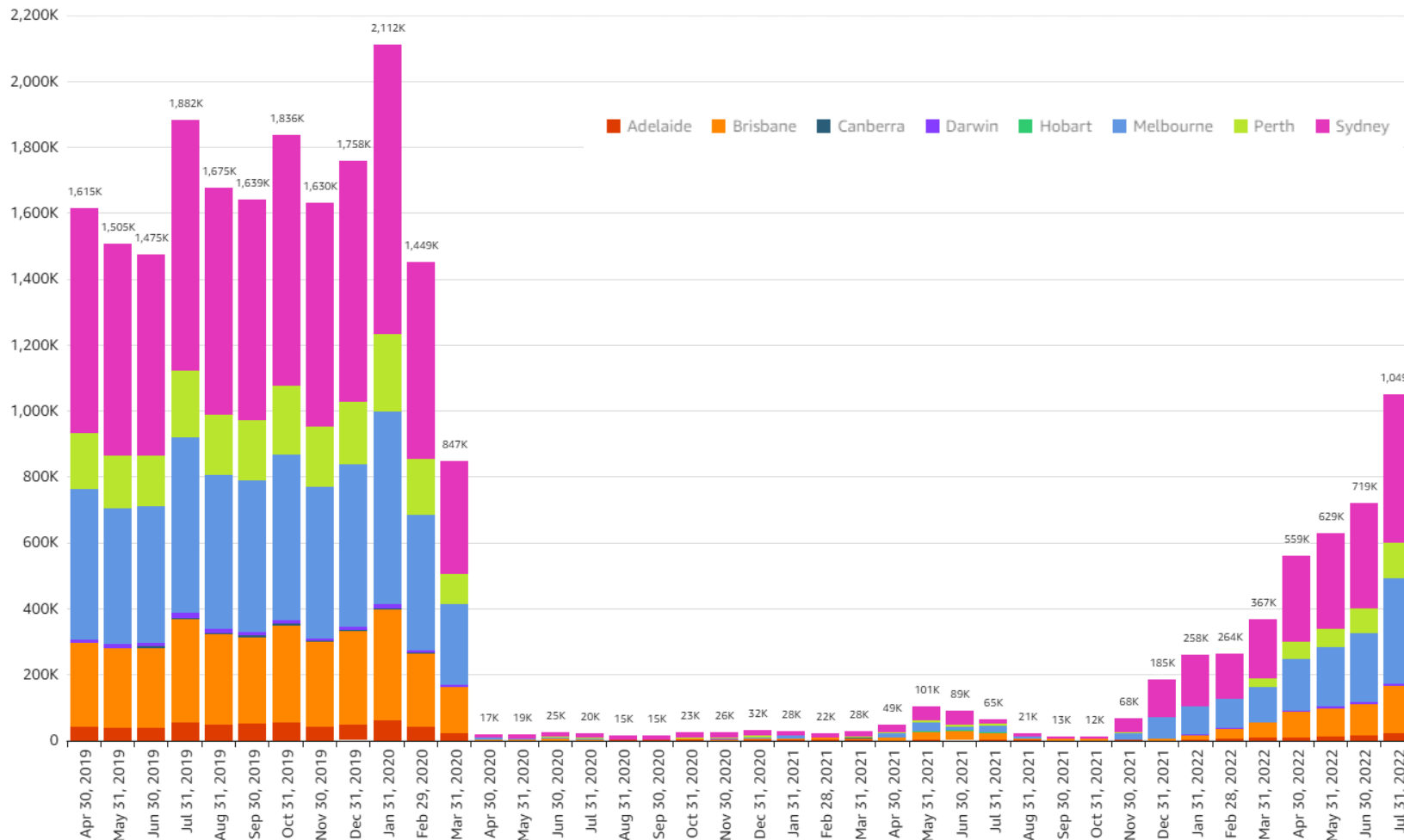
\*The ABS do not publish Hobart SA3 unemployment data and so Greater Hobart Greater Capital City Statistical Area (GCCSA) is shown instead.

# City Pulse – MOBILITY – Airport Passengers



## Inbound International Airlines Revenue Passengers by City

[Bureau of Infrastructure and Transport Research Economics, Airport Traffic Data](#): Accessed 8 October 2022



The latest airport traffic data shows that while inbound **international** passenger numbers are increasing, they remain well below pre-pandemic levels. In July 2022, there were 1,049k inbound passengers; -44% fewer than in July 2019 (1,882k).

In July 2022, most international passengers to the capitals arrived in **Sydney** (43%), followed by **Melbourne** (30%) and **Brisbane** (14%). This compared to 40%, 28% and 17% respectively in July 2019.

In Canberra, international inbound flights remain paused until December 2022. The number of international passenger arrivals in **Adelaide** was 60% lower in July 2022, compared to July 2019, while international arrivals to **Brisbane** (-55%), **Perth** (-47%), **Sydney** (-41%) and **Darwin** (-39%) also remained lower than in July 2019.

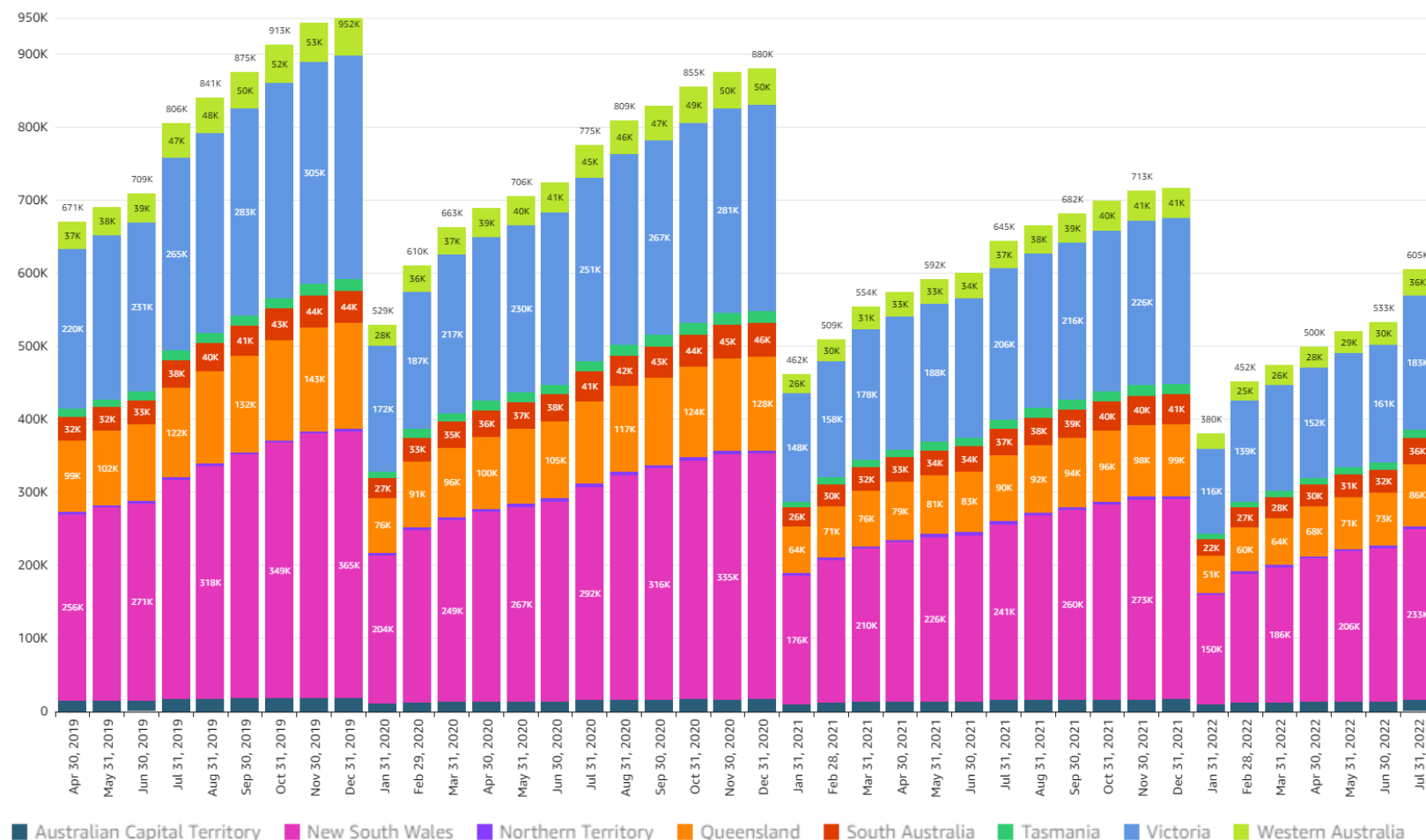
**Domestic and regional** inbound passengers have continued to make more gains towards recovery. In July 2022, there were 3.6m inbound domestic and regional passengers, compared to 4.2m in July 2019 (-13%). In July 2022, 74% of domestic and regional passengers to the capitals arrived in **Sydney** (28%) followed by **Melbourne** (27%) and **Brisbane** (19%).

# City Pulse – MOBILITY – International Students



## International Student Enrolments by State / Territory

[Australian Trade and Investment Commission, Education Data](#): Accessed 8 October 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).

Most Australian international students enrolled in courses in July 2022 were in higher education (53%) or vocational education and training (37%).

In July 2022, there were 605k international students enrolled in Australian courses. This compares to 806k in July 2019; a fall of -200k / -25%. A strong increase from June to July 2022 (+14%) suggests a return to pre-pandemic behaviour that was last seen in June to July 2019 (+14%).

**New South Wales** (38%) and **Victoria** (30%) host the largest share of international students. The number of international students in these states fell by -22% and -31% respectively, between July 2019 and July 2022.

Most international students in Australia are from China (26%), followed by India (17%). Between July 2019 and July 2022, the number of international students from China studying in Australia fell by -32% (-72k), while the number from India fell by -13% (-15k).

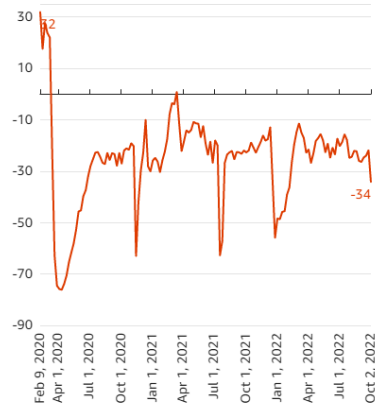
# City Pulse – MOBILITY – Retail/Recreation Visits



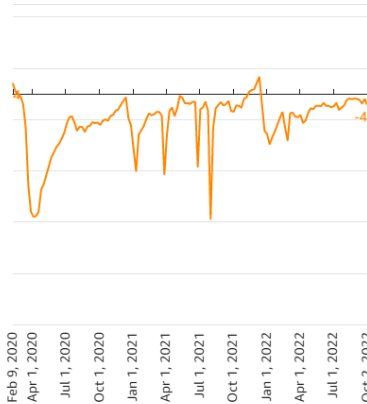
## Indexed Retail and Recreation Mobility by Local Government Area

[Google, Global Mobility Reports](#): Accessed 8 October 2022

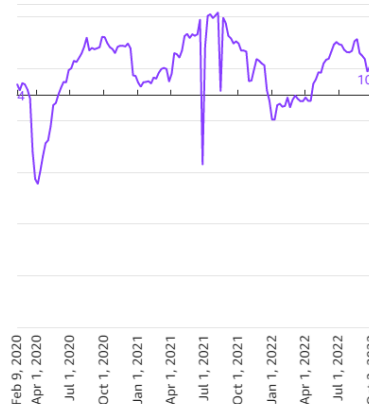
Adelaide City



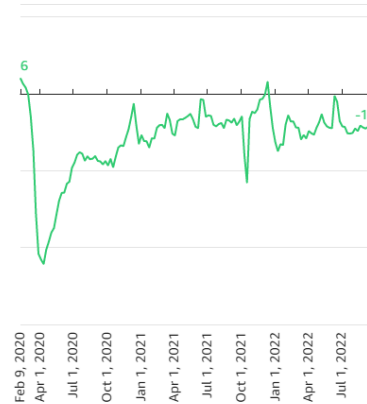
Brisbane



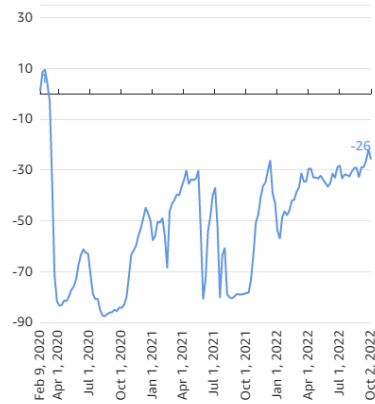
Darwin



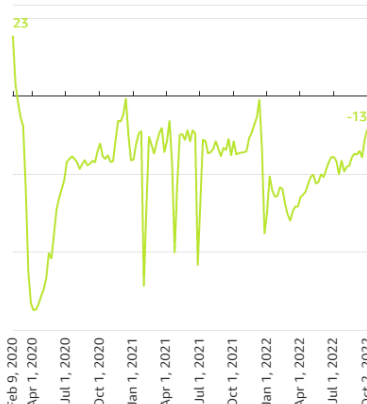
Hobart



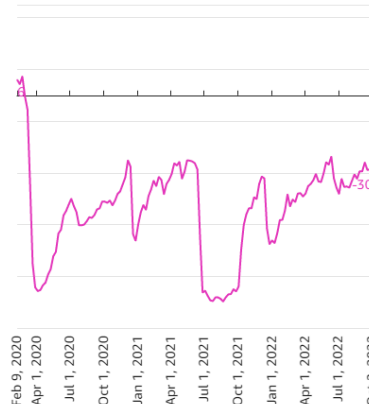
Melbourne



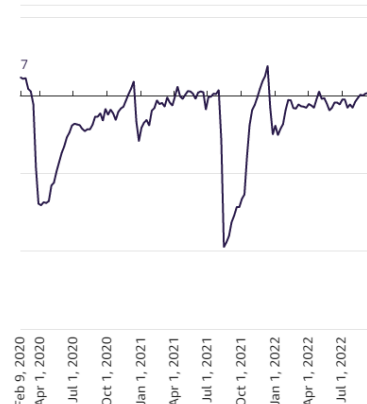
Perth



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 ending 2 October 2022 shows that **Darwin** continues to show the greatest recovery within these spaces (+10%), followed by the **ACT** (+4%) and **Brisbane** (-4%).

The data suggests that fewer people are using public transport, although the numbers are trending upwards. **Perth** (-5%) and **Darwin** (-6%) are showing the greatest recovery around transit stations, while **Adelaide** (-45%) and **Brisbane** (-38%) are the lowest.

Many people are continuing to work from home. More people were identified in residential areas in **Adelaide** (+8%), **Sydney** (+9%), and **Brisbane** (8%) **Melbourne** (+7%), for example, when compared to the pre-pandemic baseline. At the same time, fewer people were identified in work-based locations, such as in **Sydney** (-43%), **Brisbane** (-34%), the **ACT** (-31%) and **Adelaide** (-15%).



# City Pulse – APPENDIX

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## 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/>

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