

# City Pulse | Quarterly Report | April 2023



SYDNEY



ADELAIDE



MELBOURNE



BRISBANE



DARWIN



PERTH



HOBART




CANBERRA

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 Denotes that new data **has** been published since the January 2023 report

 Denotes that new data **has not** been published since the January 2023 report

# Summary

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## Personal insolvencies remain steady

- There were 164 personal insolvencies in Australia's capital cities in the October to December 2022 quarter, representing a slight increase on the previous quarter, but still substantially lower than pre-pandemic levels.

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

- Payroll jobs remain -6% below pre-pandemic levels in **Sydney**.
- Payroll jobs are +12% higher than pre-pandemic levels in **Adelaide**.

## Unemployment rates remain at historic lows

- **Perth Inner** has the lowest unemployment rate (2.7%), while **Darwin** has the highest (4.5%)
- **Perth Inner**, **Darwin**, **Adelaide** and **Brisbane** have all experienced increases in unemployment, while **Sydney**, **Melbourne**, **Hobart** and **the ACT** have all seen unemployment levels improve.

## Inbound airport passenger numbers continue to improve

- In November 2022 there were -31% international inbound passengers and -13% fewer regional and domestic inbound passengers when compared to November 2019.
- There may be improvements in coming months due to the Chinese government's reopening of borders.

## International student numbers in Australia are improving, matching 2021 levels and -13% below pre-pandemic levels

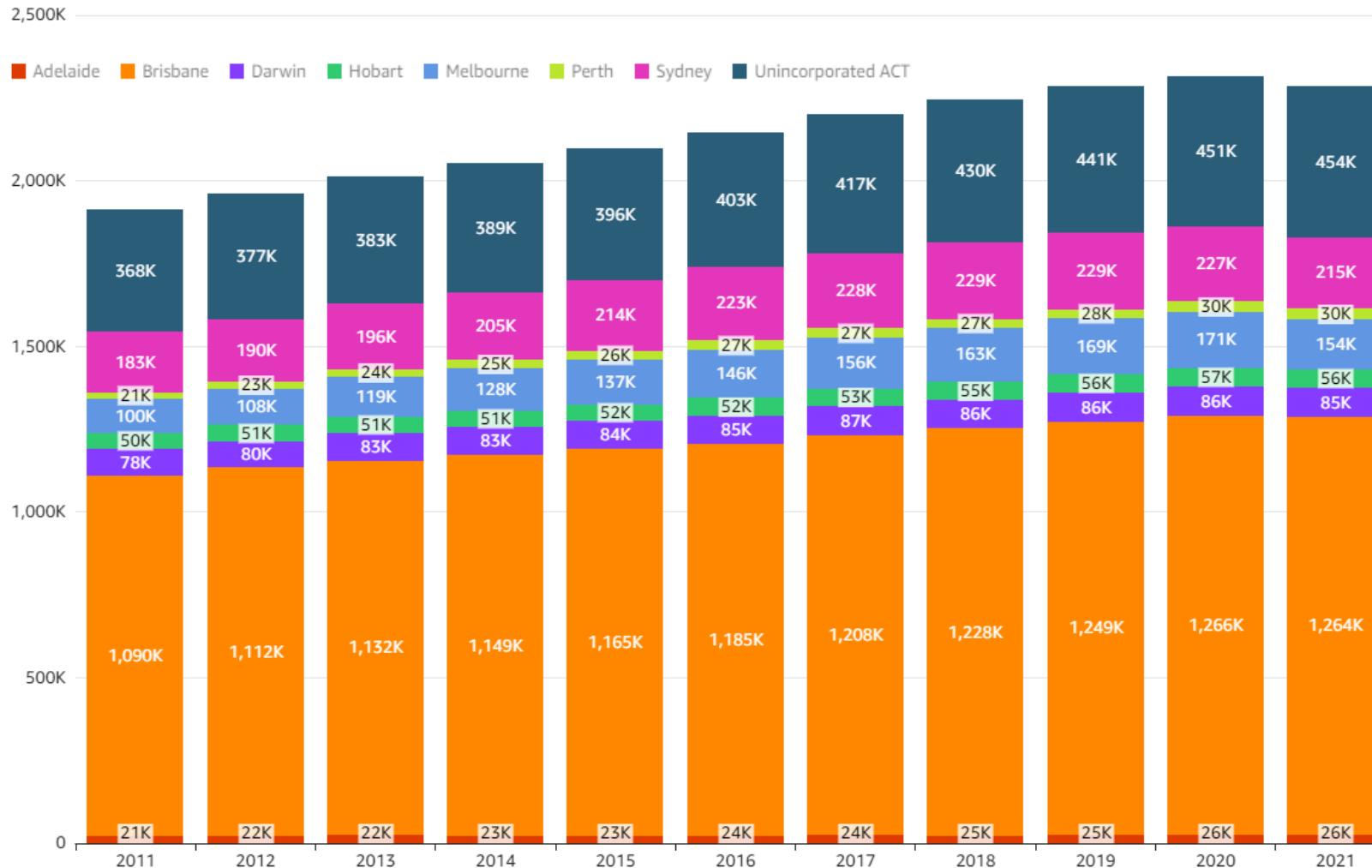
- **Queensland** and **Western Australia** have now surpassed pre-pandemic levels of international students.
- **New South Wales** has gained market share in 2023 to date.

# City Pulse – POPULATION



## Total Population by Capital City Local Government Area

[Australian Bureau of Statistics, Regional Population](#): Accessed 1 April 2023



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%).

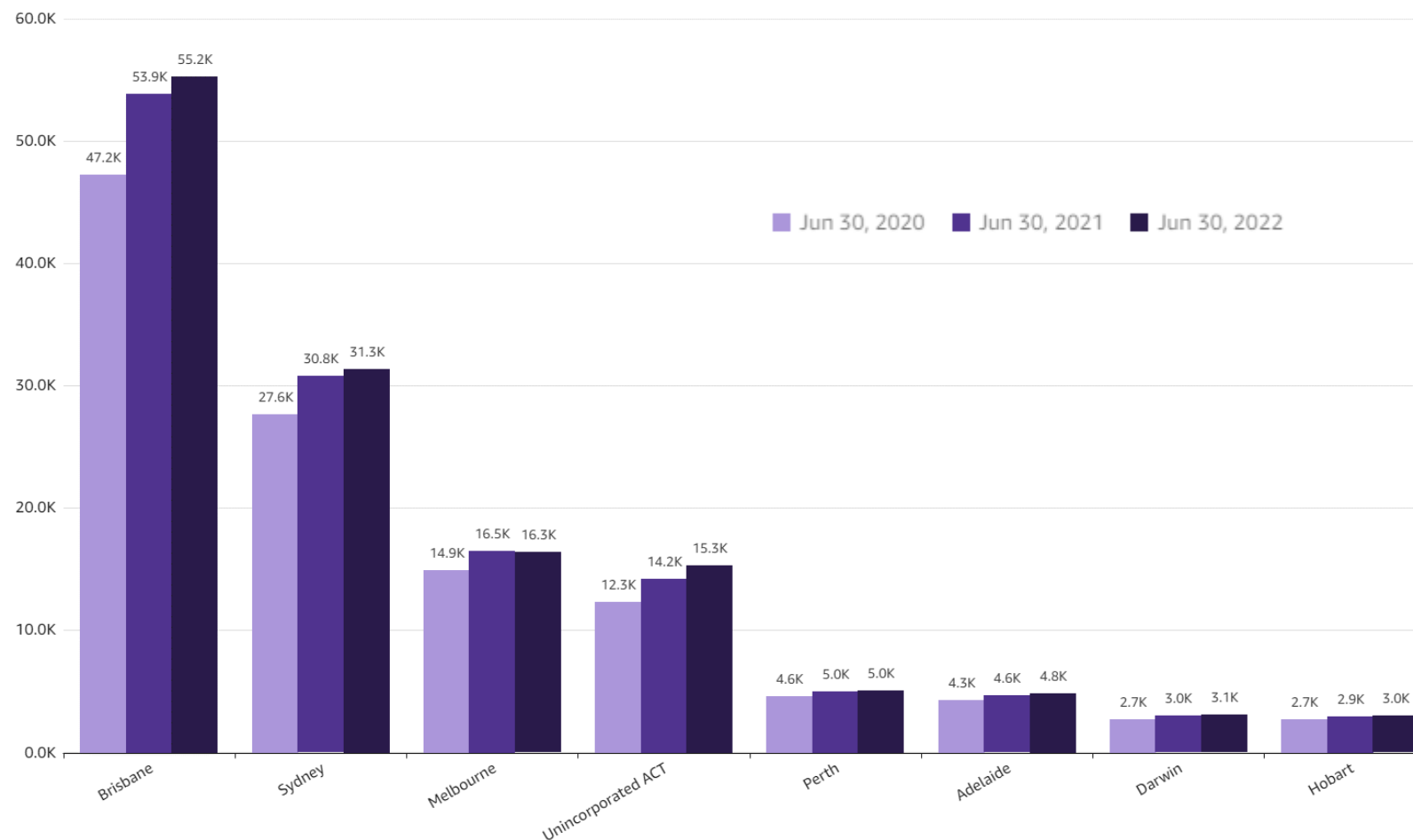
Following the onset of the pandemic, the population in Australia's capital cities fell by 1.3% between 2020 and 2021. The cities with the greatest falls in residential population between 2020 and 2021 were **Melbourne** (-10% / -17,000), **Sydney** (-5% / -12,000) and **Hobart** (-1.8% / -500). During 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 1 April 2023



On 30 June 2022 there were 330,319 actively trading businesses within Australia's capital city LGAs. Of these, only 41% had employees. Between 2021 and 2022, the number of employing business increased by 2.5% (+3,318), while the number of non-employing businesses increased by 7% (+12,000). The growth in employing business was driven by the 1-19 employee business size band (+2.5% / +2,979).

The sector with the greatest growth in employing business between 2021 and 2022 was *Professional, Scientific and Technical Services* (+847/+3%). This sector accounts for 25% of all employing business within Australia's capital cities, followed by *Construction* (10%) and *Accommodation and Food Services* (10%). With the exception of **Perth** and **Melbourne**, all capital cities experienced growth in these three sectors between 2021 and 2022, with **Melbourne** being the only city to decline overall.

The capital city with the greatest numeric growth in employing business between 2021 and 2023 was **Brisbane** (+2,785/+3%).

The capital city with the greatest percentage growth in employing business between 2020 and 2021 was **the ACT** (+2,162/+8%).

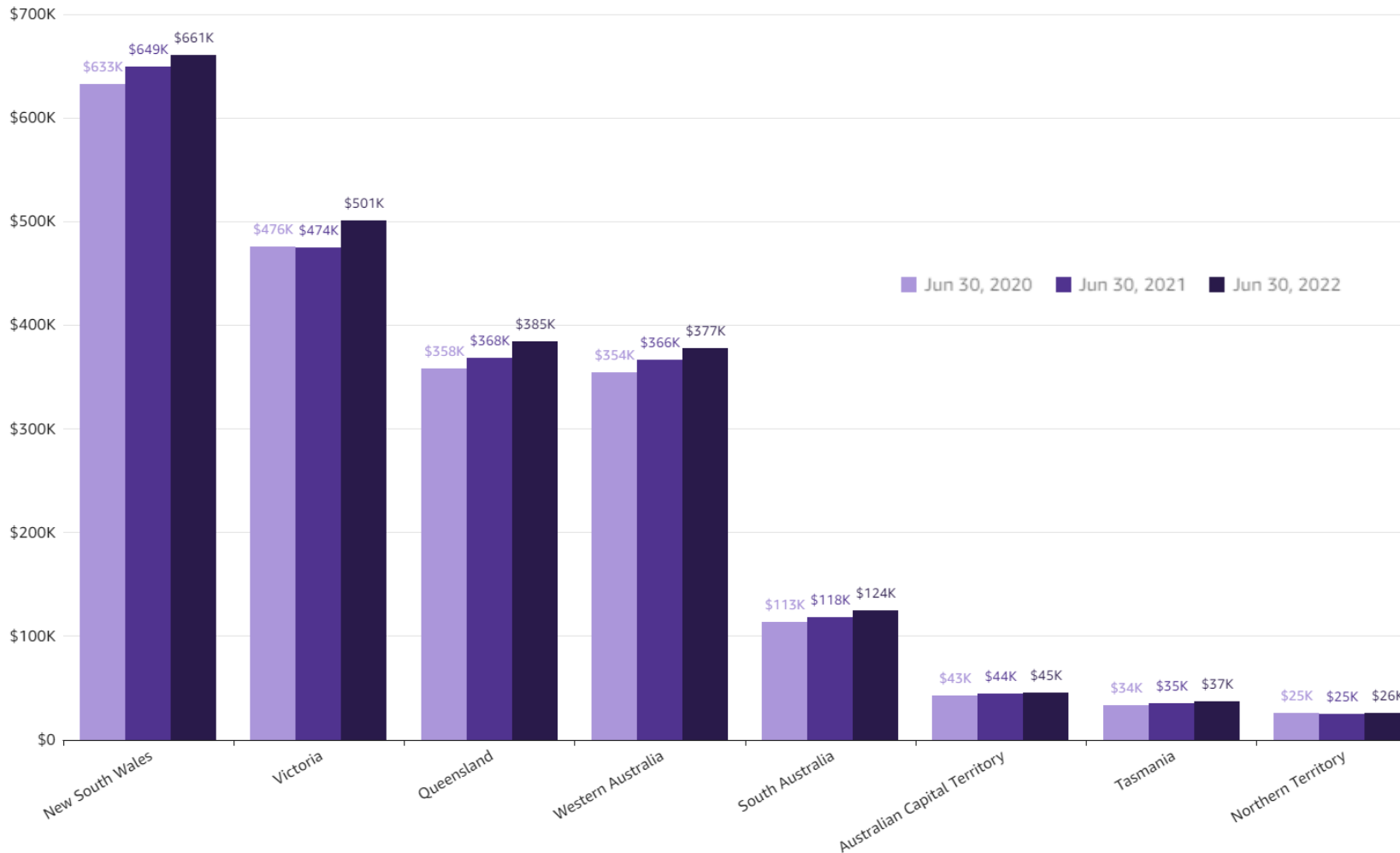


# City Pulse – ECONOMIC – Gross State Product



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

[Australian Bureau of Statistics, Australian National Accounts: State Accounts](#): Accessed 1 April 2023



Australia's economy grew by 3.5% between 2021 and 2022 – a faster rate than in between 2020 and 2021 (+2.2%). The states and territories experienced the following change in GSP between 2021 and 2022:

- **Victoria** +5.6%
- **South Australia** +5.1%
- **Northern Territory** +4.7%
- **Queensland** +4.4%
- **Tasmania** +4.3%
- **Western Australia** +3.1%
- **Australian Capital Territory** +1.9%
- **New South Wales** +1.8%

The strong growth in **Victoria** was driven by Construction, Health and Transport activities.

The growth in **South Australia** was driven by Agriculture, Construction and Manufacturing.

In the **Northern Territory** Mining was the driver behind growth in GSP, following a contraction in the previous year.

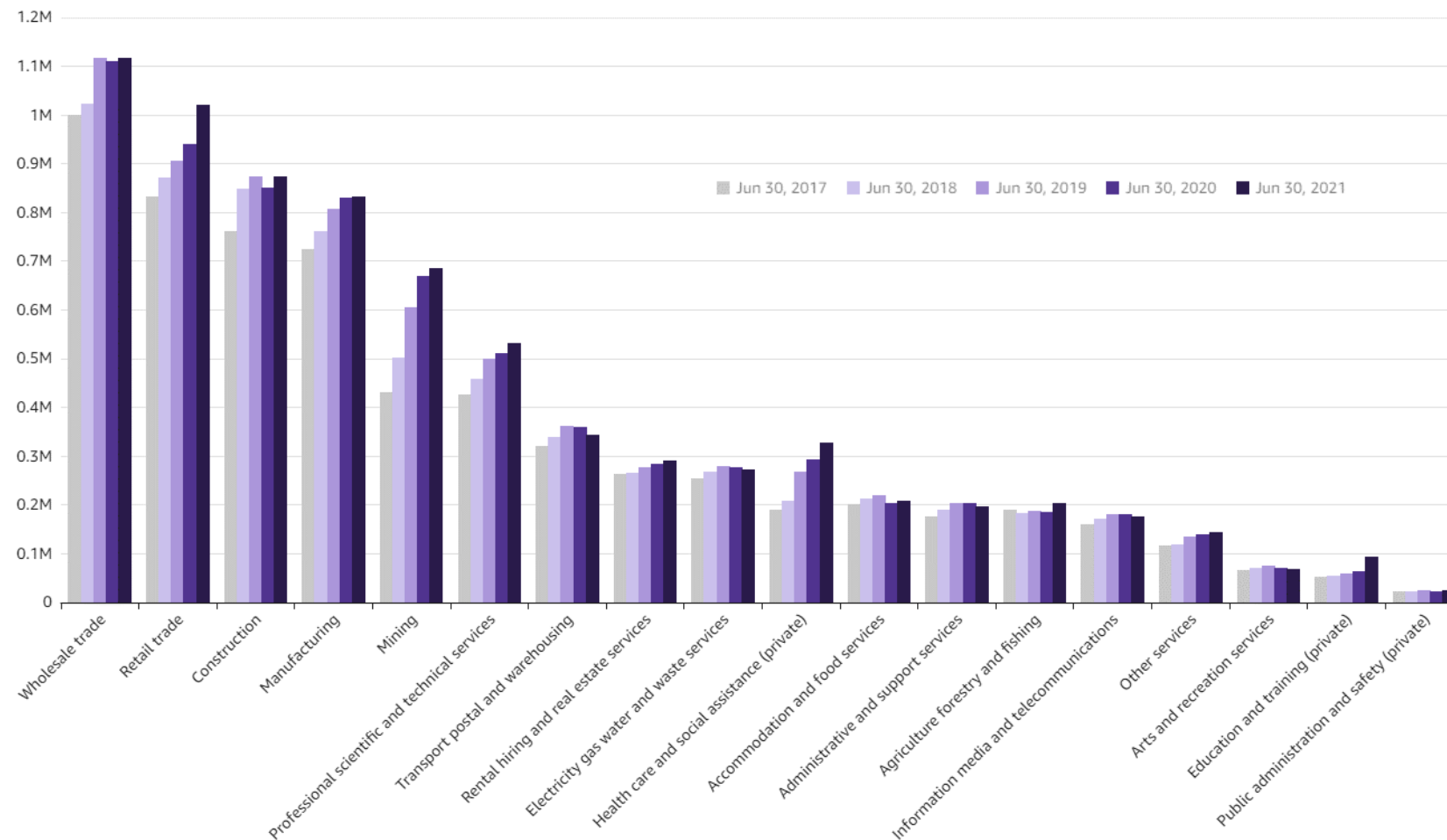
The smaller lower in **New South Wales** has been attributed to less spend on retail, Food and Accommodation during the Delta pandemic lockdowns and border closures.

# City Pulse – ECONOMIC – Sales & Service Income



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

[Australian Bureau of Statistics, Australian Industry](#): Accessed 1 April 2023



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.

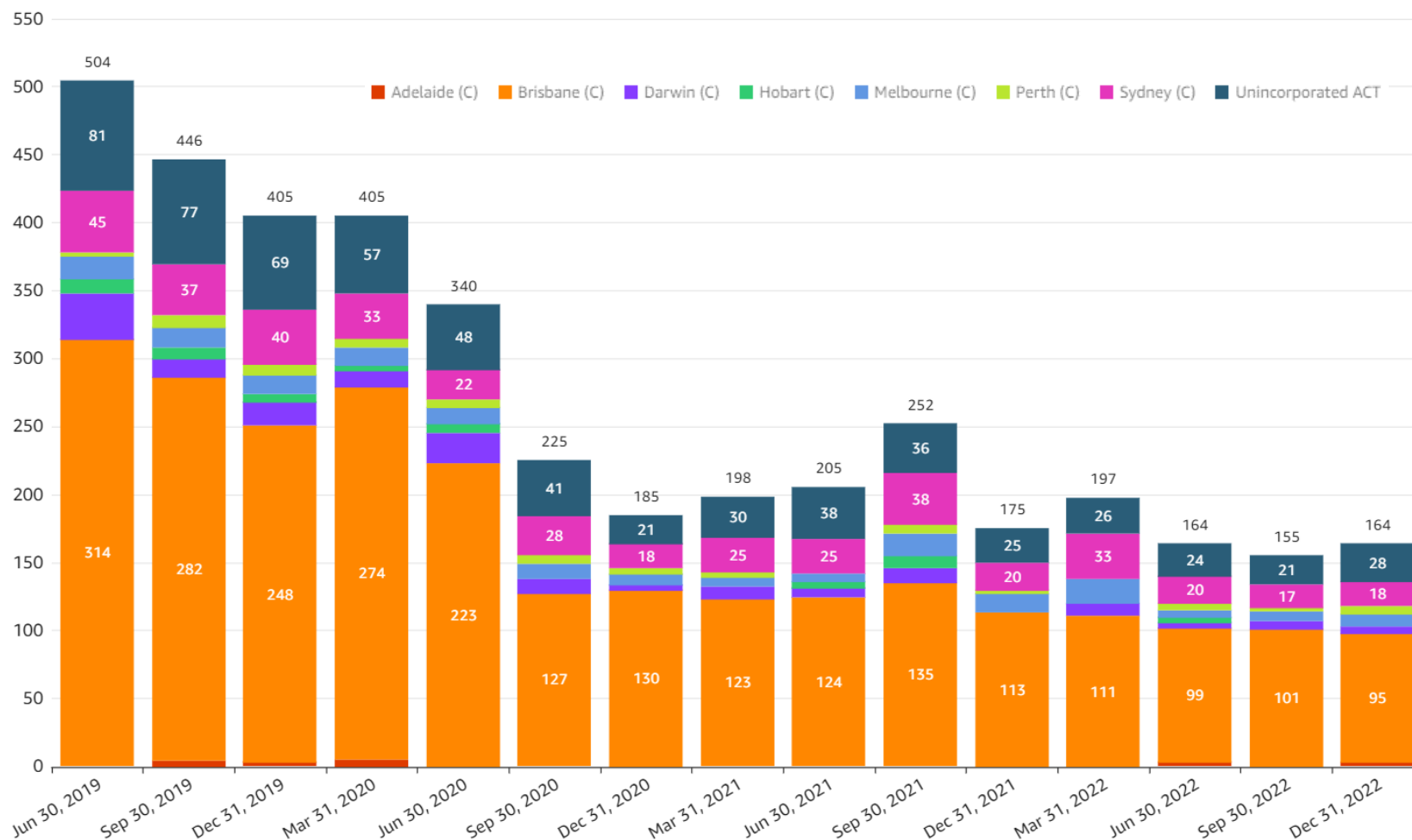
*Accommodation and Food Services* had a similar decline between June 2019 and June 2020, followed by an increase of 2.8% in the 2020/2021 financial year.

# City Pulse – ECONOMIC – Personal Insolvencies



## Personal Insolvencies by Local Government Area

[Australian Financial Security Authority, Personal Insolvency Statistics](#): Accessed 1 April 2023



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 were on a downward trajectory at the start of the COVID-19 pandemic. Over the past couple of years, the number of personal insolvencies in Australia's capital city local government areas has averaged less than 200 per quarter.

In the latest quarter for which data is available (October to December 2022) there were 164 personal insolvencies registered. This is slightly higher than the previous quarter (155).

In the October to December 2022, the majority of personal insolvencies were recorded in **Brisbane** (95), followed by **the ACT** (28) and **Sydney** (18).

There were 9 personal insolvencies recorded in **Melbourne**, 6 in **Perth**, 5 in **Darwin**, and 3 in **Adelaide**. No personal insolvencies were recorded in **Hobart** and in the most recent quarter.

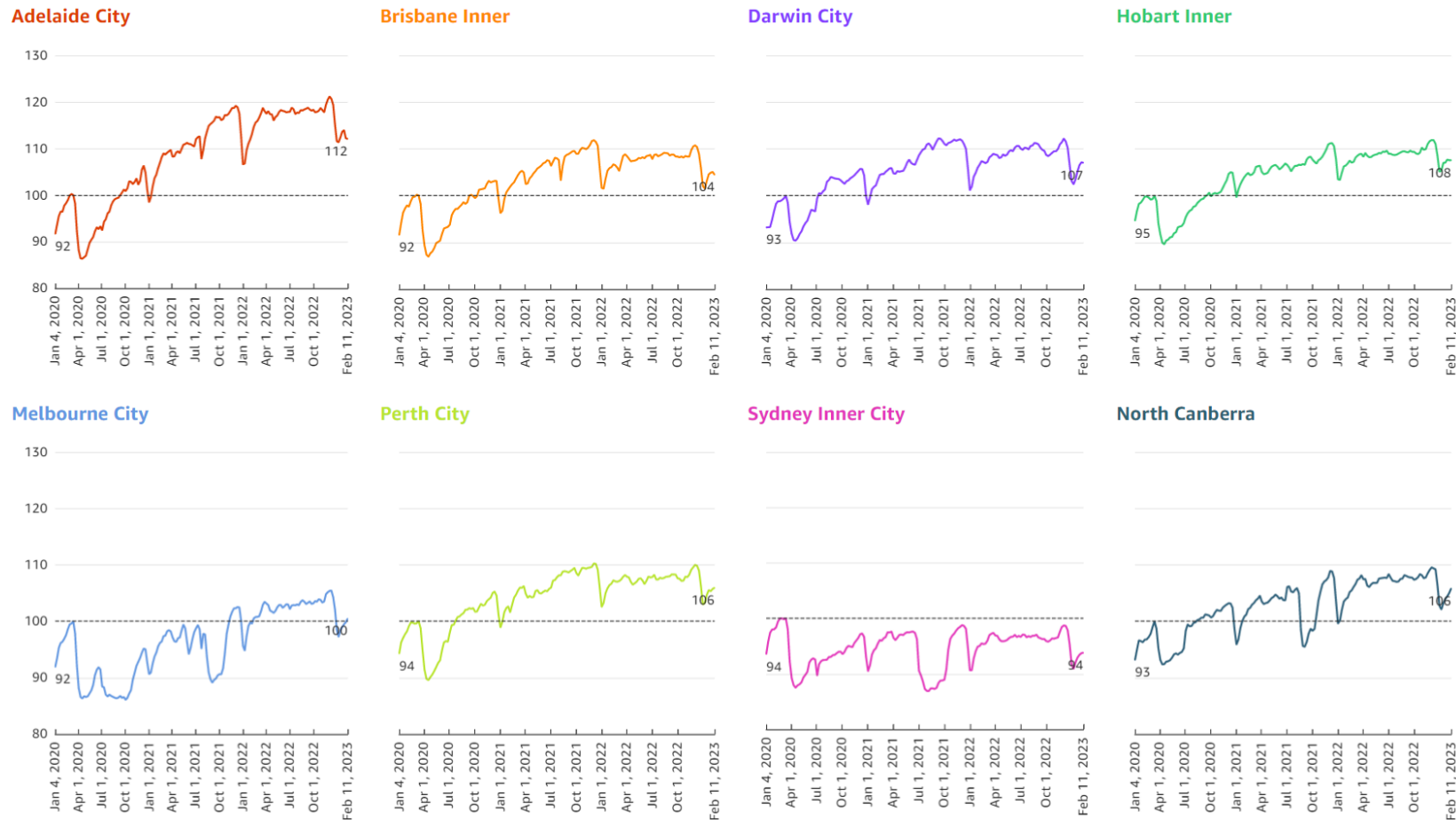


# City Pulse – LABOUR FORCE – Employment



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

[Australian Bureau of Statistics, Weekly Payroll Jobs and Wages in Australia](#): Accessed 1 April 2023



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 11 February, the capital city SA3 with the greatest percentage increase in payroll jobs recovery since the pre-pandemic baseline week was **Adelaide** (+12%), followed **Hobart** (+8%).

**Sydney** (-6%) is the only capital city continuing to record payroll jobs below the pre-pandemic baseline, while **Melbourne's** payroll jobs have returned to pre-pandemic levels, following a period of being slightly above these levels.

Across Australia, *Health Care & Social Assistance* and *Arts & Recreation* are the industries that have experienced the greatest percentage increase in payroll jobs since the pre-pandemic baseline (both +16%, as of 11 February 2023).

The ABS note that this dataset can be affected by a higher degree of reporting variability, one-off payments and seasonal employment fluctuations at the end of the calendar year/start of the new year.

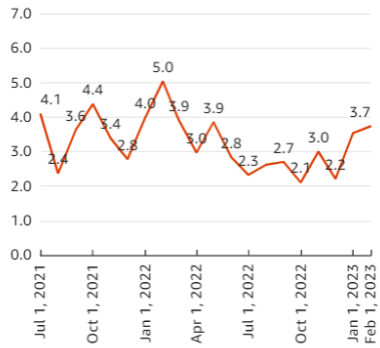
# City Pulse – LABOUR FORCE – Unemployment



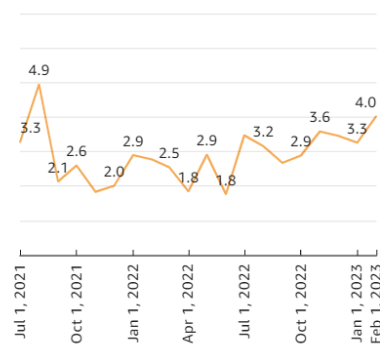
## Unemployment Rate by Statistical Area 4 (SA4)

[Australian Bureau of Statistics, Labour Force, Australia, Detailed](#): Accessed 1 April 2023

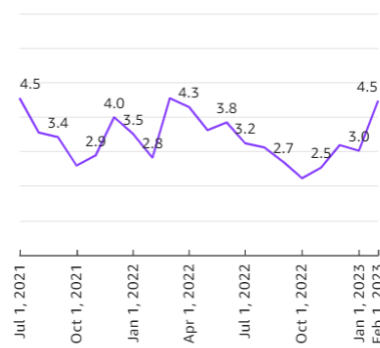
**Adelaide Central and Hills**



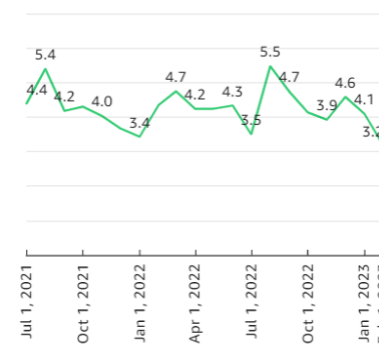
**Brisbane Inner City**



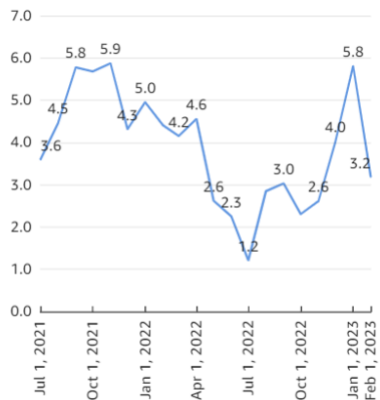
**Darwin**



**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 of 7.4% in July 2020. Since that date, it has been on a steady decline and, as of February 2023, the unemployment rate across Australia was 3.9%.

The most recent data shows that **Perth Inner** continues to be the capital city SA4 with the lowest employment rate (2.7%), although this has been increasing over the last few months. **Darwin** (4.5%) has the highest unemployment rate of the capital city SA4s and this has also increased in recent months. This trend of increasing unemployment rates is also present in both **Adelaide** (3.7%) and **Brisbane** (4.0%).

Following a period of rising unemployment rates, **Sydney – City and Inner South** (3.0%), **Melbourne Inner** (3.2%), **Greater Hobart** (3.2%) and the **ACT** (3.3%) have all experienced improvements since January 2023 – particularly **Sydney – City and Inner South** and **Melbourne Inner**.

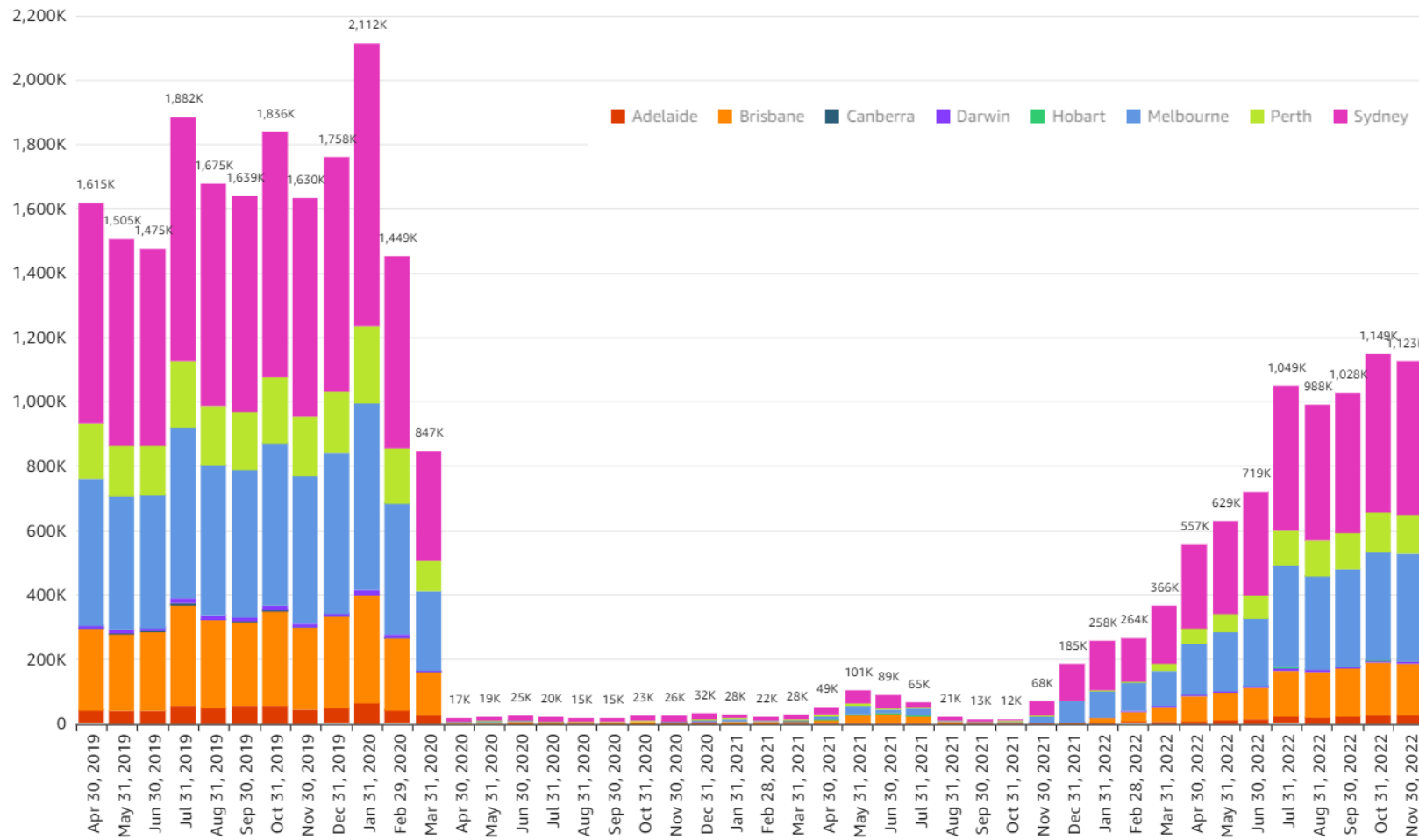
\*The ABS do not publish Hobart SA3 unemployment data and so Greater Hobart Greater Capital City Statistical Area (GCCSA) is shown instead.

# City Pulse – MOBILITY – Airport Passengers



## Inbound International Airlines Revenue Passengers by City

Bureau of Infrastructure and Transport Research Economics, Airport Traffic Data: Accessed 1 April 2023



The latest airport traffic data shows that while inbound **international** passenger numbers are increasing, they remain well below pre-pandemic levels. In November 2022, there were 1,123,000 inbound passengers; -31% fewer than in November 2019 (1,630k).

Similar to the previous update, most international passengers to the capitals in November 2022 arrived in **Sydney** (42%), followed by **Melbourne** (29%) and **Brisbane** (14%). This compared to 42%, 28% and 16% respectively in November 2019, suggesting that historical travel patterns are being observed but with a smaller volume.

The number of international passenger arrivals in **Adelaide** has improved since the previous report, although still remains 40% lower than November 2019. International arrivals have also improved in **Darwin**, which are now 22% below November 2019 performance. **Brisbane** (-37%), **Perth** (-32%), **Melbourne** (-28%), and **Sydney** (-30%) have also seen improvements but are still below November 2019 levels. International travel levels are likely to improve in future updates with Chinese border restrictions being relaxed in early January 2023.

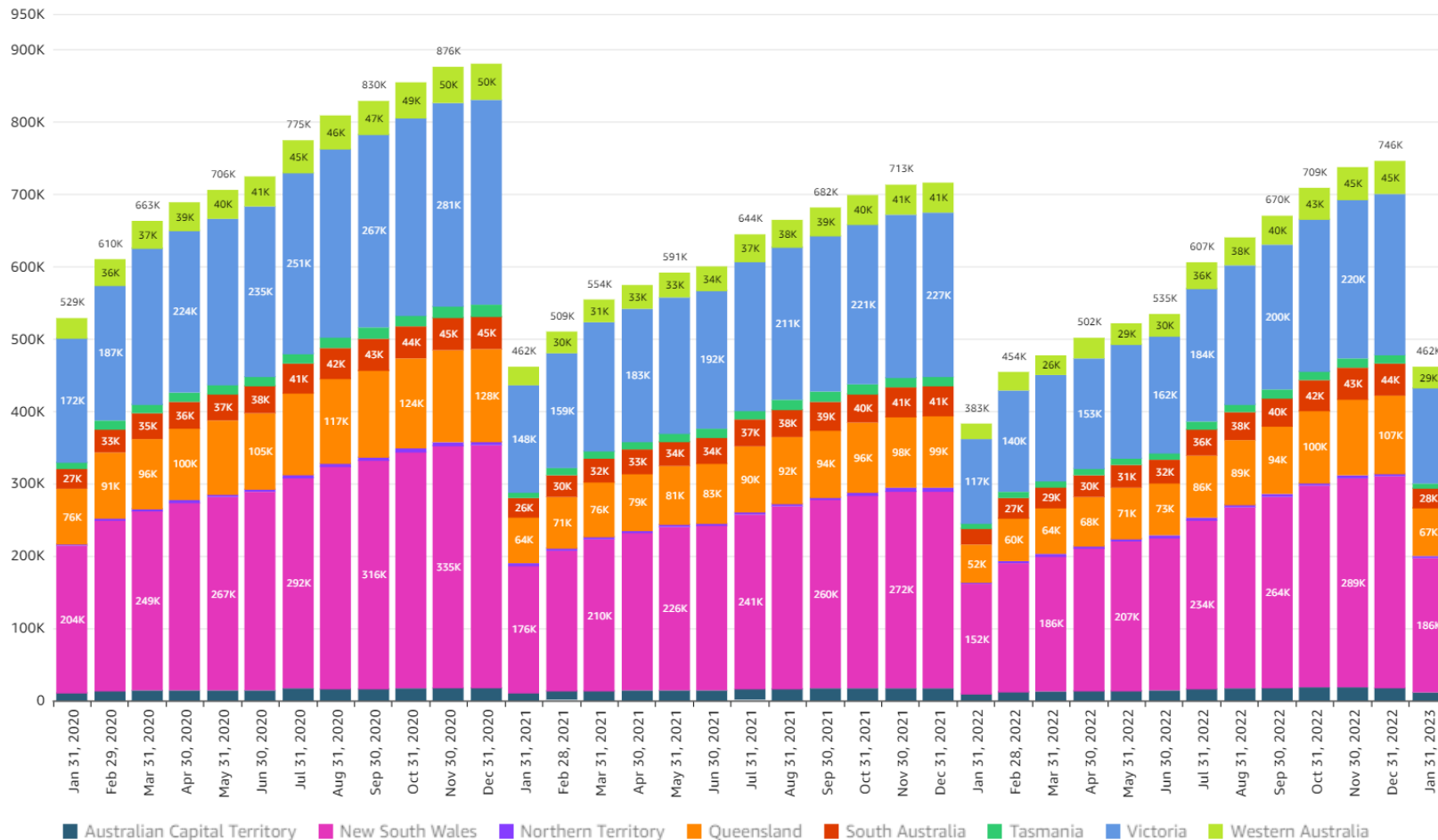
**Domestic and regional** inbound passengers have maintained their performance in recent months. In November 2022, there were 3.5m inbound domestic and regional passengers, compared to 4.1m in November 2019 (-13%). Domestic and regional inbound flights in **Sydney** and **Melbourne** drive this trend, with both being 16% and 15% (respectively) below November 2019.

# City Pulse – MOBILITY – International Students



## International Student Enrolments by State / Territory

[Australian Trade and Investment Commission, Education Data](#): Accessed 1 April 2023



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 January 2023, international student levels are similar to January 2021 at 462k and 13% below January 2020 levels. The key difference in 2023 is that **New South Wales** looks to have gained a larger market share (40%) than it did in 2021 (38%). By comparison, **Victoria's** share has declined in 2023 compared to 2021 (29% vs 32%), suggesting students are returning to **NSW** sooner. Students are also returning to **Queensland** and **Western Australia** in 2023, with both states now surpassing pre-pandemic levels.

Given the Chinese Government's recent changes to [online study](#) in overseas universities, these figures may look quite different in future updates.

In January 2023, most international students in Australia are from China (22%), followed by India (16%). There are an increasing number of students arriving from Nepal (10%), Columbia (4%) and Thailand (4%), suggesting new markets are interested in international study in Australia following the pandemic.

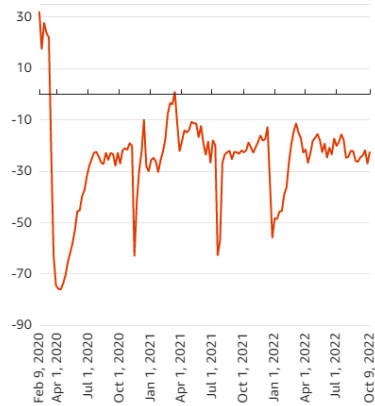
# City Pulse – MOBILITY – Retail/Recreation Visits



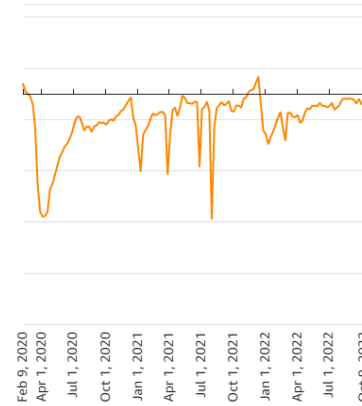
## Indexed Retail and Recreation Mobility by Local Government Area

[Google, Global Mobility Reports](#): Accessed 1 April 2023

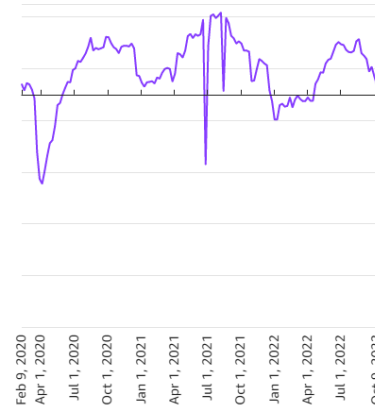
Adelaide City



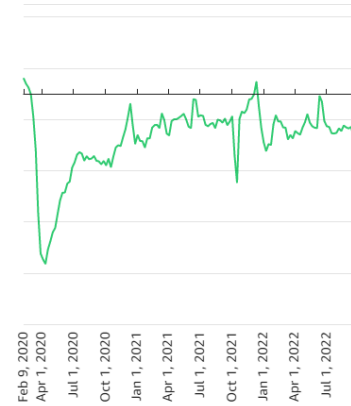
Brisbane



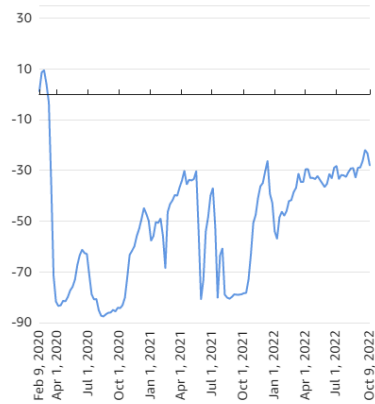
Darwin



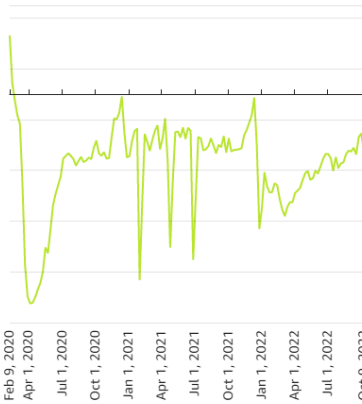
Hobart



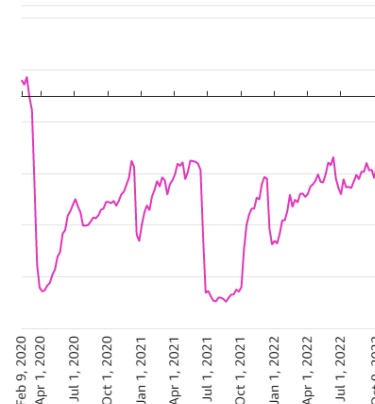
Melbourne



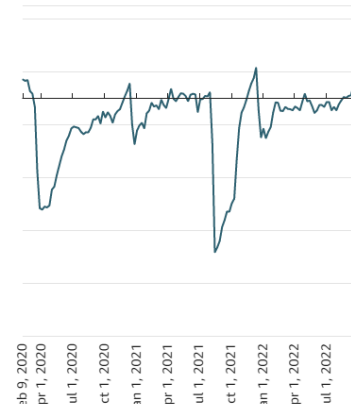
Perth



Sydney



Australian Capital Territory



From the beginning of the pandemic to 15 October 2022, Google\* provided 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 drops were experienced in **Melbourne** (-88% in August 2020), followed by **Perth** in April 2020 (-82%) and **Sydney** in August 2021 (-80%).

The latest data shows that **Darwin** continued to show the greatest recovery within these spaces (+4%), followed by **the ACT** (+2%) and **Brisbane** (-4%).

The data suggests that fewer people were using public transport, although the numbers were trending upwards. **Perth** (-1%) and **Darwin** (-13%) were showing the greatest recovery around transit stations, while **Melbourne** (-37%) and **Hobart** (-33%) were the lowest.

Many people continued to work from home. More people were identified in residential areas in **Melbourne** (+9%), **Sydney** (+8%), **Adelaide** (+7%) and **Perth** (+6%), 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** (-26%), **Melbourne** (-13%), **Brisbane** (-8%), and **Hobart** (-5%).

\* Google is no longer updating mobility data

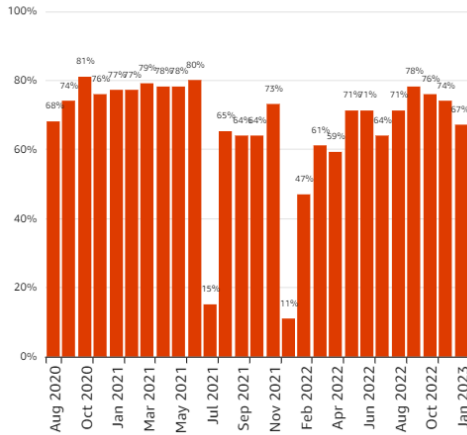
# City Pulse – ECONOMIC – Office Occupancy



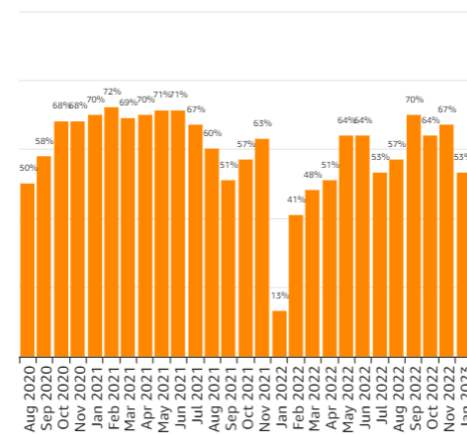
## Levels of occupancy in office buildings as a percentage of the pre-pandemic rate by city

Property Council of Australia: Accessed 1 April 2023

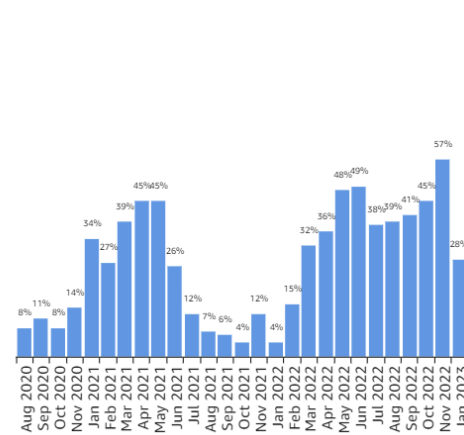
Adelaide



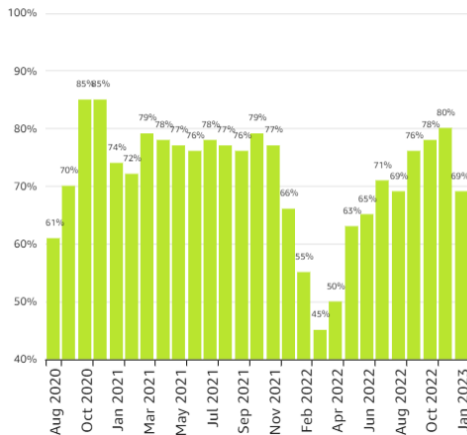
Brisbane



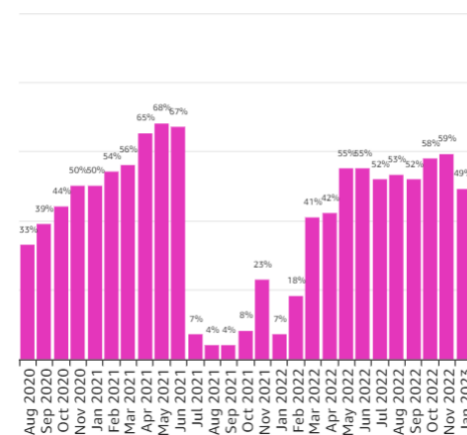
Melbourne



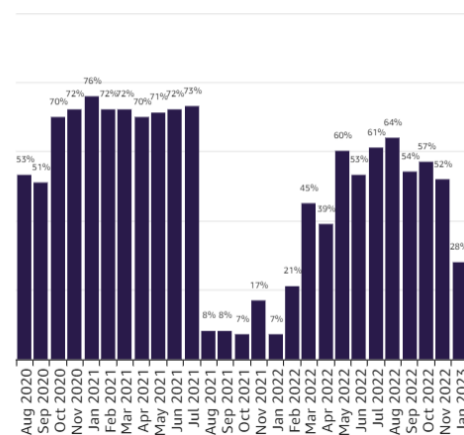
Perth



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 January 2022, the Property Council of Australia's office occupancy survey showed that the cities with the highest occupancy rates compared to pre-pandemic were **Perth** (69%) and **Adelaide** (67%).

All six cities experienced a fall in office occupancy rates between November 2022 and January 2023.

**Canberra** and **Melbourne** have the lowest rates of office occupancy in January 2023 (both 28% of the pre-pandemic office occupancy rates). Both cities experienced a period of particularly low occupancy from mid-2021, followed by good recovery until November 2022, and then a large fall occupancy in the most recent survey results.

On 6 December 2022, the Fair Work Legislation Amendment (Secure Jobs, Better Pay) Act 2022 received royal assent. Part 11 of the [Act](#), which comes into effect on 6 June 2023, strengthens the right for employees to request flexible working arrangements.

\*Data for Hobart and Darwin was not available for this report  
Please note that data is not published for December



# 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 have been 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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