



Australian Government
The Treasury



Ministerial Submission

MS25-002005

FOR ACTION – Your Cities Agenda

TO: Minister for Housing, Minister for Homelessness, Minister for Cities - The Hon Clare O'Neil MP

s 22



Recommendations

s 22



- That you agree to the handling approach for the State of the Australian Cities Report, s 22



Approved / Not approved

Signature

Date: / /2025

The SoAC remains unpublished and is an outstanding 2022 election commitment

- As part of the 2022 election, the Government committed to deliver a State of Australian Cities Report (SoAC) as *an accurate and up-to-date picture of life in our big cities*.
- The SoAC was finalised in November 2024 and provides a comprehensive report as an evidence base to the NUP but remains unpublished. A copy of the final SoAC is at **Attachment C**.
- As the SoAC is currently written, there is limited opportunity to leverage the report to align with your portfolio responsibilities and the Government's current housing agenda. Re-drafting and updating the report would require funding or a re-prioritisation of the department's resources. As such, the department recommends you do not publish the report.
- Instead, the department recommends you incorporate a revised SoAC into the National Housing and Homelessness Plan following the 2026-27 Budget.
- Repurposing the SoAC through this lens emphasises the importance of well-located and affordable housing within our cities should be close services, jobs, green spaces and essential services.

s 47E(d)

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5 September 2025

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B The State of Australian Cities Report

s 22



Australian Government

State of Australian Cities 2024



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Acknowledgement of Country

The Australian Government acknowledges the Traditional Owners and Custodians of the lands on which our cities stand. We pay our respects to First Nations people whose continuous connection to Country spans over 60,000 years, sustaining hundreds of distinct Nations with sophisticated knowledge systems, languages and cultures.

We acknowledge First Nations people's enduring stewardship of Country, which ensured millennia of sustainability and prosperity. Traditional knowledge and understanding of Country continues to offer vital wisdom for creating sustainable, inclusive cities.

We pay our respects to Elders past and present, and to emerging leaders who carry forward this legacy of knowledge and connection to Country. The Australian Government commits to genuine partnership with First Nations people in planning and shaping our cities and suburbs as places of belonging for all.

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Foreword

Nearly 80% of Australia’s population lives in one of our 20 largest cities, making Australia a predominantly urban nation. For many Australians, ‘the city’ represents a place of opportunity, connection and transformation—a destination for life’s significant moments and milestones.

Our cities are more than population centres; they are the foundation of our national prosperity and wellbeing. They contribute over 75% of our Gross Domestic Product (GDP) and serve as gateways to the dynamic Indo-Pacific region. Our cities’ world-leading research institutions and unique natural assets position them to be powerhouses of industry and innovation.

However, the basic building blocks of urban life—affordable housing, accessible services, nearby employment and education—remain fundamental to reaching our collective potential. Strategic government investment has consistently shown its power to catalyse change: relatively modest public funding often leverages significant private investment to transform urban areas.

Our cities also stand at the frontline of climate change response. Urban areas must build resilience to things like extreme heat and disasters while seizing opportunities to reduce emissions through more sustainable buildings and transport practices. This is not just about managing risk—it is about creating more liveable, sustainable communities with greater amenity and lower costs.

In December 2022, the Prime Minister, the Hon Anthony Albanese MP, announced the Australian Government would publish a National Urban Policy and reinstate the State of Australian Cities report series as part of a renewed focus on cities.

Since the last State of Australian Cities report in 2015, we have seen significant shifts in how we use and experience our cities. The COVID-19 pandemic has reshaped working patterns, while housing affordability challenges have become more acute. Economic disparities and social inequalities require renewed attention, and the urgency of climate action has intensified.

This report provides an analysis of the current state of our cities. It will inform the serious task of finding solutions that can make a real difference in Australians’ lives—from infrastructure and housing to sustainability and economic opportunity. Understanding these challenges is essential as we work to align policy vertically and horizontally across different portfolios and levels of government.

Through this report and the National Urban Policy, the Australian Government is committed to active engagement in urban policy. We recognise that reaching our individual and collective potential requires collaboration between government, industry, workers, experts and communities. Together, we can build cities that support a vibrant, successful, multicultural social democracy—one that harnesses our diversity and interconnectedness to drive creativity, collaboration and innovation.

Senator the Hon Jenny McAllister

Minister for Emergency Management and Cities

Introduction

Purpose

The *State of Australian Cities 2024* analyses the factors that shape Australia's 20 most populated cities and offers comprehensive insights into life in Australia's cities.

This report marks the reintroduction of the State of Australian Cities series. It is built on a foundation of data from Australia's 2021 Census, providing a consistent and nationally representative dataset. Where available and relevant, updated or additional data has been incorporated to enrich the analysis.

Central to this report is the recognition of cities' vital role in the nation's social, economic, environmental and cultural wellbeing. By identifying key data points that can establish benchmarks, this report enables tracking and measuring of progress over time.

The report is framed around the three interconnected goals of the National Urban Policy, which aim to ensure Australia's urban places are:

- liveable and equitable
- productive and innovative
- sustainable and resilient.

The report analyses these goals, using better practice case studies to provide qualitative insights and highlight innovative solutions already underway.

This report acknowledges First Nations' urban experiences, highlighting both historical impacts and contemporary achievements. Data is presented through a strengths-based lens that recognises First Nations leadership and self-determination.

Australia's urban governance system involves various layers of federal, state, territory and local governments, each with distinct responsibilities and frameworks. This report aims to support decision making across governments, industry, academia and private sectors by providing a data-driven overview of Australian cities, so that decision makers can develop targeted urban policies that promote sustainable and prosperous urban environments.

This report should be read in conjunction with the National Urban Policy. For a broader understanding of the national context, the *State of Australia's Regions 2024* report, *Australia State of the Environment 2021* report, *State of the Housing System 2024*, *State of the Climate 2024* report, *National Agreement on Closing the Gap* and *Measuring What Matters* are also recommended reading.

City definitions

A city is commonly defined by population size and extent of urbanisation.¹

As Australia's cities and urban places continue to grow, the Organisation for Economic Co-operation and Development (OECD) uses the term 'functional urban areas' to define cities and their surrounding areas based on population density and cell contiguity. This definition of cities expands the city boundaries to include areas economically connected through workplace commuting.²

Capital and non-capital cities

This report mainly uses capital and non-capital city categories due to the data generated through the Australian Bureau of Statistics (ABS) and the boundaries used. Capital cities insights are developed using the Greater Capital City Statistical Area (GCCSA) data. Non-capital cities insights are developed using the

Significant Urban Area (SUA) data. This makes them easier to compare. However, it should be recognised that the two are different and provide different functions.

Australia's 20 most populated cities

Australia's population has been steadily growing by around 1.4% a year on average over the last 30 years.³ From around 27 million today, Australia's estimated resident population is projected to grow 1.1% for each of the next 40 years and is expected to reach 40.6 million in 2062–63.⁴

Table 1 and Figure 1 show Australia's 20 largest cities by population. These cities are the focus of the data and insights in this report.

Table 1: Australia's 20 largest cities by population size

City	Population as at 2023	City	Population as at 2023
Sydney	5,450,496	Geelong	302,046
Melbourne	5,207,145	Hobart	253,654
Brisbane	2,706,966	Townsville	186,734
Perth	2,309,338	Cairns	160,933
Adelaide	1,446,380	Darwin	150,736
Gold Coast–Tweed Heads	735,213	Toowoomba	149,817
Newcastle–Maitland	526,515	Ballarat	116,390
Canberra	466,566	Bendigo	104,883
Sunshine Coast	407,859	Albury–Wodonga	100,095
Wollongong	313,745	Launceston	93,364

Source: [ABS] Australian Bureau of Statistics. Australian Government. (2024). *Regional population 2022–23*. <https://www.abs.gov.au/statistics/people/population/regional-population/latest-release>, accessed 27 June 2024.

Figure 1: Map showing Australia's 20 largest cities



City ring classifications

Australia has large cities, emerging cities and significant regional centres, which are interdependent and interconnected regardless of their size and location. Historically, larger cities have typically been structured in three rings:

- inner-city ring areas, which host the central business district (CBD) and densely populated mixed-use neighbourhoods
- middle-city ring areas, which enjoy good access to the CBD and services
- outer-city ring areas, which have long commute times and poor access to services.⁵

In Australia, cities have often expanded outwards from the centre.

City ring classifications have been used by the Bureau of Communications, Arts and Regional Research (BCARR) and the Bureau of Infrastructure and Transport Research Economics (BITRE) for 10 years. They divide the five largest capital cities into three sectors around the central business district. The cities are:

- Sydney
- Melbourne
- Brisbane
- Perth
- Adelaide.

The Sydney, Melbourne, Perth and Adelaide rings are constructed from Statistical Area Level 2 (SA2s) within their GCCSA boundaries. However, a narrower definition is used for Brisbane (including 3% less population than the GCCSA) due to lower population density differences.⁶ The Glossary has more city ring information. Figures 58 to 62 show the 2021 boundaries used throughout this report.

Australia’s major cities

Australia’s cities are the primary population centres and economic hubs of the nation. They provide essential services including healthcare, education and transport networks and communication systems that service both urban populations and surrounding regions.

This section gives a comprehensive snapshot of Australia’s 20 largest cities—referred to in this report as ‘Australia’s major cities’. It gives insights into their current state and the challenges and opportunities they face.

This section examines the 20 cities using the National Urban Policy goals of ‘liveable and equitable’, ‘productive and innovative’, and ‘sustainable and resilient’.

The data from these cities shows both achievements and challenges, particularly in areas of housing affordability, socio-economic equity and a changing climate.

Data points

This report uses a set of data points (Table 2) to measure aspects of progress. These data points provide a holistic view of urban life, encompassing social, cultural, economic and environmental aspects of city living.

The data points are designed to:

- give an objective review of urban conditions
- create benchmarks that can measure and compare aspects of urban development and change over time
- capture lived experience in cities across domains.

The National Urban Policy goals are interrelated, with measurable connections between social, economic and environmental indicators.

The Australian Bureau of Statistics 2021 Census was conducted during the COVID-19 pandemic, and that may have skewed some metrics used in the report. In particular, data on work patterns, commuting and use of public spaces may not represent typical behaviour. In many of these instances 2016 Census data is used as a better proxy for typical behaviour.

Data is not currently available at the city level for many of the data points for each goal. However, this data is expected to become available in future, which will provide improved insights into how Australian cities are performing.

Table 2: National Urban Policy goals and related data points

Goal	Data points	Context
Liveable and equitable	City population growth	Population growth data helps planners anticipate future infrastructure and service needs for sustainable urban expansion.
	Demographics: <ul style="list-style-type: none"> • First Nations • Age • Language spoken at home (other than English) 	Demographic data shows city diversity, informing tailored services, housing, and urban design.
	Household income	Income data identifies economic disparities, guiding policies on housing, social services, and development.

Goal	Data points	Context
	Housing: <ul style="list-style-type: none"> • Dwelling stock • Housing affordability • First Nations home ownership • Average household size • Social housing • Homelessness • First Nations homelessness 	Housing data points assess access, affordability, and equality across demographic groups, including First Nations.
	People’s attitudes to liveability	Data on people’s attitudes to liveability shows the lived experience in cities to balance the statistical data.
	Index of Relative Socio-Economic Disadvantage	The Index of Relative Socio-Economic Disadvantage summarises economic and social conditions to determine advantage or disadvantage levels within cities.
	Access to services: <ul style="list-style-type: none"> • Healthcare access • First Nations access • Disability access • Education access • First Nations education access • Child care access • Open public space • Culture and leisure access • Event attendance and participation • Community and sport infrastructure 	Access to services data measures the accessibility and proximity of essential services for city residents.
	Movement: <ul style="list-style-type: none"> • Commuting distance • Car dependency • Public transport use • Active travel • Walkability 	Movement data captures commuting patterns, transport preferences, and urban design effectiveness. This information is key to understanding urban mobility and accessibility and the environmental impact of travel choices.
	Safety	Safety data reflects security levels and perceptions within cities.
	Productive and innovative	Economy: <ul style="list-style-type: none"> • Gross Domestic Product • Gross Regional Product
Labour force data: <ul style="list-style-type: none"> • 3-year employment growth • Working age population • Unemployment • Underemployment • Underutilisation • Proportion of First Nations persons aged 25–64 who are employed 		Labour force data, including employment growth and working age population, illustrate the use of available labour pools within cities and their post-COVID-19 recovery.

Goal	Data points	Context
	Major industries of employment: <ul style="list-style-type: none"> • Health care and social assistance • Information technology • Tourism • Knowledge-based industries • Culture • Sport • New industries (like net zero) 	Major industries of employment data reveal labour market diversity and job concentration, which can inform targeted investment decisions.
	Business innovation	Business innovation metrics indicate economic growth potential and adaptability.
	Education attainment: <ul style="list-style-type: none"> • Year 12 attainment • Certificate III+ • University • Vocational attainment • First Nations education 	Educational attainment data points help identify skill gaps within cities and inform education investment for future job markets.
	Spatial distribution of jobs (employment precincts)	Spatial distribution of jobs maps employment precincts and common transport modes used by employees.
	Night-time economy revenue	Night-time economy revenue indicates city liveliness and post-COVID nightlife recovery.
	Physically connected: <ul style="list-style-type: none"> • Freight • Passenger kilometres • Road congestion 	Physically connected data measures freight movement, passenger travel, and road congestion. This data point reflects economic activity, infrastructure efficiency, and quality of life issues related to travel time and accessibility.
	Digital connectivity	Digital connectivity data measures the extent and quality of digital infrastructure, including internet access and usage across different urban areas.
	Population dynamics: <ul style="list-style-type: none"> • Overseas migration • Internal migration • Natural population increase 	Population dynamics data tracks overseas and internal migration patterns, as well as natural population increase, showing how urban populations change over time.
Sustainable and resilient	Disaster impacts: <ul style="list-style-type: none"> • Disaster activations • Funding support provided • Insurance costs 	Disaster impact measures, including activations, funding support and insurance costs, reveal disaster costs and the effectiveness of resilience practices.
	Energy resilience	Energy resilience metrics indicate the robustness of power supply systems.
	Emissions reductions	Emissions reduction data measures cities' progress in lowering carbon footprints and meeting emissions targets.
	Heat-Health Index exposure	Heat-Health Index exposure indicates how urban areas are impacted by higher temperatures associated with climate change.
	Population-weighted density	Population-weighted density captures city density and urban spread.

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Goal	Data points	Context
	Nationwide House Energy Rating Scheme (NatHERS) and National Australian Built Environment Rating System (NABERS) building energy efficiency ratings	NatHERS and NABERS ratings measure energy efficiency in new residential and commercial buildings, impacting comfort, health, costs, emissions and energy infrastructure needs. NABERS also measures existing commercial buildings.
	Transport emissions	Transport emissions data is used to measure progress in reducing transport-related emissions across different transport modes.
	Electric vehicle uptake	Electric vehicle uptake data shows progress towards a more sustainable transport system.
	Resource use, waste disposal and reuse (circular economy)	Resource use, waste disposal and reuse data demonstrate the integration of circular economy principles in cities.
	Urban biodiversity levels, including tree canopy coverage	Urban biodiversity levels show the variety, abundance and health of flora and fauna ecosystems within cities.

Liveable and equitable

Australia’s population

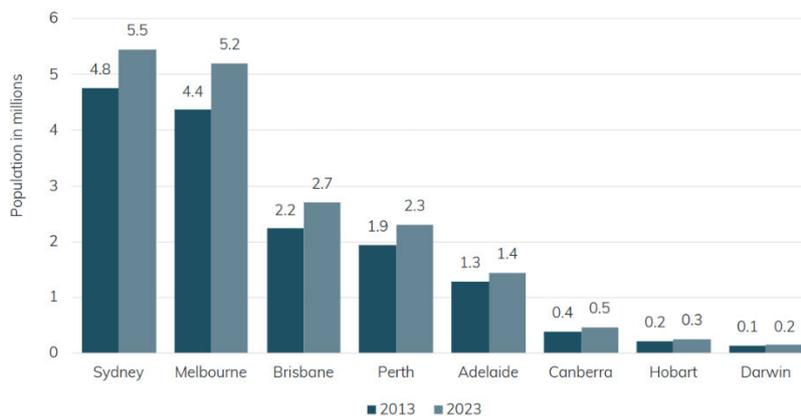
Between 2013 and 2023, Australia’s population grew at an average annual rate of 1.4%. This growth has been predominantly in urban areas. As of 2023, nearly four out of five Australians (79.5%) live in the 20 largest cities, up from 78.1% in 2013. Approximately 40% of the entire population resides in just 2 cities: Sydney and Melbourne.

In 2019, 87% of Australia’s population lived within 50 kilometres of the coast,⁷ in both urban and regional areas. The population in these areas continues to increase, and those living in regional and remote areas often need to link with cities to access services.

The largest capital cities continue to absorb most population growth (Figure 2):

- As of June 2023, Sydney has the largest population (5.5 million), followed by Melbourne (5.2 million) and Brisbane (2.7 million).
- The largest absolute growth was in Melbourne. Melbourne’s population increased by 837,078 between 2013 and 2023, followed by Sydney (693,132), Brisbane (465,022), Perth (365,483) and Adelaide (156,684).

Figure 2: Capital city population growth, 2013 and 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Population: Population Count [Data Set].

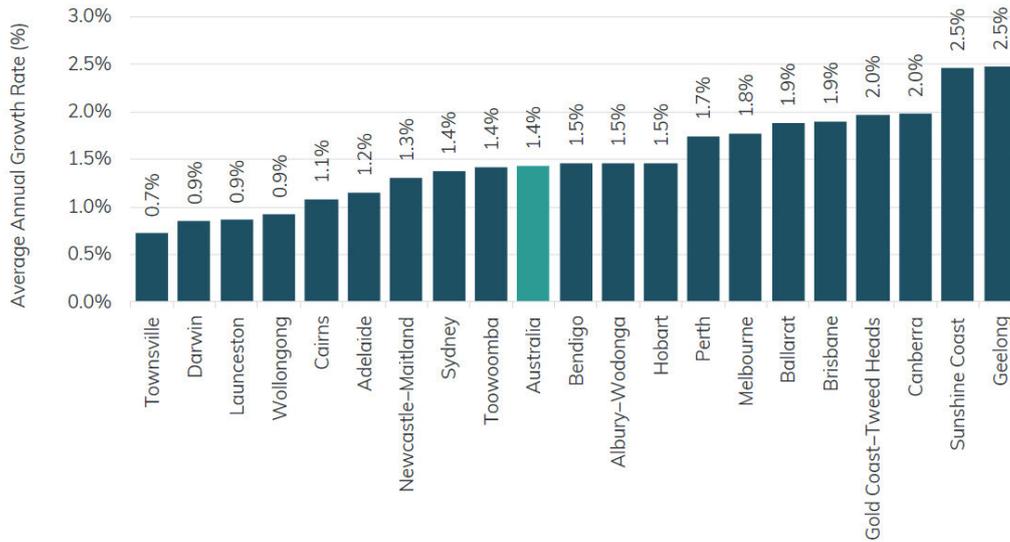
Several smaller cities, particularly those near large capital cities, have shown significant growth between 2013 and 2023:

- Gold Coast–Tweed Heads added 130,629 people.
- Sunshine Coast added 88,290 people.
- Canberra added 83,309 people.

Regional populations grew faster than capital cities during 2020–21. However, this was influenced by COVID-19 and is not the usual trend. Past trends have indicated that most capital city populations generally grow faster than their respective regional areas.⁸

Overall, the average annual growth rate (AAGR) across the major cities shows great diversity between 2013 and 2023. This reflects changing natural, internal and international migration patterns and lifestyle choices.⁹ Geelong had the highest AAGR at 2.5%—well above the national AAGR of 1.4%.

Figure 3: Average annual growth rate, 2013 to 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Population: Population Count [Data Set].

Population growth within Australia’s five largest capital cities has been mainly in the outer-city ring areas. However, population growth within cities is not uniform. For example, between 2013 and 2023:

- The most rapid growth has been in the outer-city ring area of four of the largest capital cities.
- Melbourne’s outer-city ring area grew at 2.6% per annum, and Brisbane and Perth’s outer-city ring areas grew at 2.3% and 2.2% per annum respectively. Sydney’s outer-city ring grew at 1.7% per annum.
- Brisbane’s inner-city ring area is the exception, growing strongly at 2.6% per annum, reflecting significant infill development. However, Brisbane’s outer-city ring area still added more new residents than its inner-city ring area.

At a more granular level:

- Newly developing suburbs on the outer fringes of the largest capital cities dominate recent growth. For example, between 2013 and 2023, Schofields East on Sydney’s north-western fringe and Mickleham–Yuroke and Wollert on Melbourne’s northern fringe each added over 27,000 people.
- Exceptions include greenfield development on Gold Coast–Tweed Heads and Sunshine Coast; and infill development, including in Wentworth Point–Sydney Olympic Park in Sydney’s middle-city ring area and in Melbourne’s central business district (CBD), each adding more than 10,000 people.

Outer-urban growth is set to continue. The outer-city ring areas of the five largest cities are expected to have the highest proportion of people by 2036.

Overseas and internal migration patterns

Migration patterns play an important role in shaping Australia’s population distribution:

- In 2023, net overseas migration was the primary source of growth for all capital cities.
- Brisbane has the highest net internal migration (15,300 persons), followed by Perth (10,700).
- Sydney (–38,400) and Melbourne (–6,700) had the highest negative net internal migration.
- There has been a consistent net migration outflow from capital cities to regional Australia—a trend that increased significantly during the COVID-19 pandemic.

It should also be noted that many migration trends are age specific. The 15 to 24 year age group is the only category showing positive net migration into capital cities, likely because of the education and early career opportunities (Table 3).

Table 3: Comparison of age profiles across capital and non-capitals cities, 2022

Highest proportion of children aged 0–14	Highest proportion of working age population aged 15–64	Highest proportion of retirement age population aged 65 and over
Capitals: <ul style="list-style-type: none"> • Darwin 20.2% • Brisbane 19.2% • Perth 18.9% 	Capitals: <ul style="list-style-type: none"> • Darwin 69.8% • Canberra 68.2% • Melbourne 67.1% 	Capitals: <ul style="list-style-type: none"> • Hobart 18.7% • Adelaide 18.5% • Perth 15.7%
Non-capitals: <ul style="list-style-type: none"> • Toowoomba 19.8% • Albury–Wodonga 19.4% • Townsville 19.4% 	Non-capitals: <ul style="list-style-type: none"> • Townsville 66.9% • Cairns 65.8% 	Non-capitals: <ul style="list-style-type: none"> • Sunshine Coast 21.9% • Bendigo 19.5%

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Population by Age [Data Set].

Australia’s population is set to continue to grow

Australia’s urban landscape is set to evolve further:

- The combined population of Australian capital cities is expected to reach 21.4 million by 2034, up from 17.9 million in 2023.¹⁰
- Brisbane’s population is expected to exceed the rest of Queensland combined by 2027–28.¹¹
- Among non-capital cities, Gold Coast–Tweed Heads is projected to remain the most populous urban area by 2036, followed by Newcastle–Maitland and Sunshine Coast.

First Nation populations

In 2021 First Nations people comprised 3.8% of Australia’s total population (983,700 people).¹² First Nations population growth was consistent between 2011 and 2021, averaging 2.0% annually.¹³ Cities are important centres for First Nations communities:

- In 2021, while over half (51.6%) of First Nations people lived in Australia’s 20 largest cities, this is notably lower than the 80.3% of non-First Nations people residing in urban areas.
- Similarly, the proportion of First Nations people living in capital cities was 37.2% in 2021, which contrasts with the 68.4% of non-First Nations people who lived in capital cities.
- Brisbane is projected to have the highest First Nations population average annual growth rate (2.8% over 2021–2031) and the largest projected increase in First Nations population from 2021 to 2031 (30,401).
- Canberra has the smallest First Nations population of the capital cities (9,525). However, it is projected to have the second highest average annual growth rate between 2021–2031 (2.7%).
- Darwin has the highest proportion of First Nations people (13.2%) but the lowest projected growth rate (0.8% over 2021–2031).

Changes in the First Nations population can occur through changes in self-identification as a First Nations person, as well as through births, deaths and migration.

Australia’s population is ageing

Over the 10 years to 2022, the proportion of people aged 65 years and over increased at a faster rate than other age groups, representing a significant demographic shift with a 10-year average annual growth rate of 3.3%. The growth for this cohort substantially outpaced other age cohorts (around 1% for 0–14 years and 15–64 years). As of 2022, 17.1% of the population is of retirement age (65 years and over), compared to 64.6% of working age (15–64 years) and 18.3% of children (0–14 years).

From 2012 to 2022, the 65 and over age group was the fastest growing demographic in all capital cities. Average annual growth rates ranged from 2.7% in Adelaide to 5.5% in Darwin. These growth rates are projected to continue—between 2023 and 2034 rates are expected to range from 2.3% in Adelaide and Sydney to 3.3% in Darwin. By 2034, Hobart, Adelaide and Perth are projected to have the highest proportions of people aged 65 and over among capital cities (22.7%, 21.1% and 18.2% respectively).

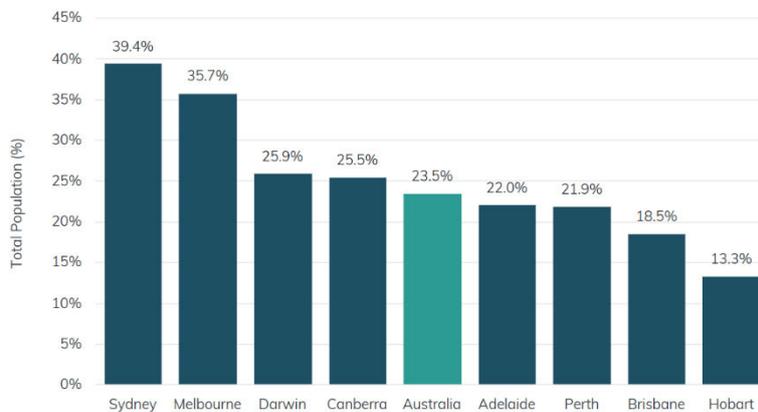
Non-capital cities, particularly in coastal and regional areas, showed similar trends. From 2012 to 2022, the highest growth rates for the 65 and over age group were in Cairns (5.6%), Sunshine Coast (4.4%) and Albury–Wodonga (4.2%). Between 2023 and 2036, the average annual growth rates for this age group are projected to be highest in Sunshine Coast (3.2%), followed by Ballarat (3.1%).

Multicultural diversity within our cities

Nationally in 2021, 76,978 First Nations people reported using a First Nations language at home, which is up from 63,754 people since 2016.¹⁴ However, data for First Nations language is not currently available at the city level.

Australia has a strong urban multicultural foundation. The 5 largest capital cities have higher representation of overseas-born residents. Sydney and Melbourne are home to the majority of people from non-English speaking backgrounds (Figure 4).

Figure 4: Proportion of people who speak a language other than English at home by capital city, 2021



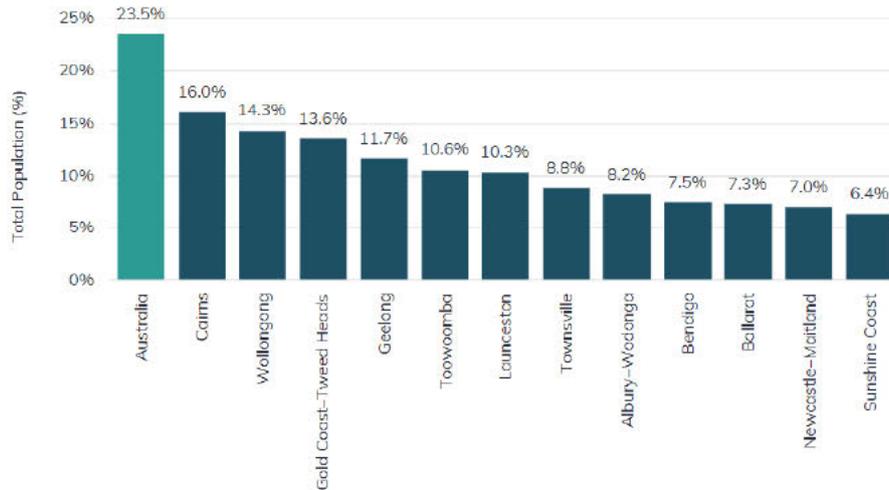
Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Migrants and Ethnicity [Data Set].

The highest rates of non-English language use were typically found in the middle-city ring areas of major cities. For example, over half (54.8%) of Sydney’s middle-city residents spoke a language other than English at home. Adelaide was the only exception—the rate was slightly higher in the inner-city ring area (28.5%) compared with the middle-city ring area (28.0%).

In Sydney and Melbourne, rates of non-English speakers are higher in outer-city ring areas than inner-city ring areas. The opposite is true for Brisbane, Perth and Adelaide. European languages are more prevalent in inner-city ring areas, while Asian languages are more common in outer-city ring areas.

All non-capital cities were below the national rate for non-English languages spoken at home (Figure 5). Among non-capital cities, Cairns had the highest proportion of non-English speaking people, while Sunshine Coast had the lowest.

Figure 5: Proportion of people who speak a language other than English at home by non-capital city, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Migrants and Ethnicity [Data Set].

Mandarin is the most common non-English language in most capital cities, except Darwin, where Greek is the most common non-English language and Mandarin ranks fourth (Table 4). Mandarin features in the top five for almost all major cities, except Sunshine Coast, where German is the most common non-English language and Mandarin does not appear in the top 5 languages. Arabic has a significant presence in Sydney. Vietnamese is in the top 5 for all capital cities except Darwin. Punjabi is in the top five for all capital cities except Sydney and Darwin.

Table 4: Top 5 non-English languages spoken at home by capital city, 2021

No.	Sydney	Melbourne	Brisbane	Perth	Adelaide	Canberra	Hobart	Darwin
1	Mandarin (5.25%)	Mandarin (4.55%)	Mandarin (2.67%)	Mandarin (3.73%)	Mandarin (2.33%)	Mandarin (3.32%)	Mandarin (2.69%)	Greek (2.52%)
2	Arabic (4.44%)	Vietnamese (2.47%)	Vietnamese (1.11%)	Italian (1.74%)	Italian (1.70%)	Nepali (1.35%)	Nepali (1.93%)	Nepali (2.11%)
3	Cantonese (2.92%)	Greek (2.22%)	Punjabi (0.94%)	Vietnamese (1.63%)	Vietnamese (1.60%)	Vietnamese (1.16%)	Punjabi (0.77%)	Tagalog (2.03%)
4	Vietnamese (2.29%)	Punjabi (2.09%)	Cantonese (0.91%)	Punjabi (1.50%)	Greek (1.54%)	Punjabi (1.16%)	Cantonese (0.49%)	Mandarin (1.66%)
5	Hindi (1.54%)	Arabic (1.88%)	Spanish (0.81%)	Cantonese (1.44%)	Punjabi (1.41%)	Hindi (1.10%)	Vietnamese (0.46%)	Filipino (1.42%)

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Migrants and Ethnicity [Data Set].

The linguistic landscape in non-capital cities is more diverse, reflecting specific migrant and refugee communities in these regions. For example:

- Kurdish is the most spoken non-English language in Toowoomba.
- Karen (Sino-Tibetan) is the most spoken non-English language Bendigo.
- Macedonian is the most spoken non-English language in Wollongong.
- Japanese is the most spoken non-English language in Cairns.
- Nepali is the most spoken non-English language in Albury-Wodonga and Launceston.

Some less common languages appear more significant in certain areas:

- Hazaragi in Adelaide’s outer-city ring areas
- Croatian in Geelong

- Creole in Cairnsⁱ
- Swahili in Albury–Wodonga.

Language diversity and inclusion in public spaces and multicultural events provide opportunities for diasporic communities to celebrate and share cultures.¹⁵ These events not only showcase the rich culture of modern Australia but also contribute to social cohesion and tourism.¹⁶

Lunar New Year celebrations have become significant cultural events in Australia, predominately including Chinese, South Korean, Singaporean, Malaysian, Indonesian and Vietnamese communities.¹⁷ Cities like Sydney and Bendigo have incorporated these festivities into their cultural landscapes, promoting diversity.¹⁸

In 2021, there were 673,352 Indian-born people in Australia, making it the second-largest overseas-born community after England.¹⁹ Events like Diwali and Holi have become popular celebrations in major Australian cities, promoting cultural exchange and understanding. Punjabi and Hindi languages are now among the fastest growing languages in Australia.²⁰

Melbourne’s cultural landscape is significantly influenced by its Italian and Greek communities:

- 73,799 residents were born in Italy (1.6% of the city’s population)
- 50,884 residents were born in Greece (1.1% of the city’s population).²¹

Second and third-generation Australians of Italian and Greek descent are not included in these figures. If they were, these numbers would increase significantly.

These communities contribute to Melbourne’s vibrancy:

- The city’s renowned ‘Little Italy’ in Lygon Street and the Greek Precinct on Lonsdale Street offer culinary experiences, contributing to Melbourne’s reputation as an international food capital.²²
- Events like the Melbourne Italian Festa²³ and the Antipodes Festival²⁴ celebrate these cultures and give opportunities for cultural exchange and community engagement.
- Language schools and cultural education programs have been established, enriching Melbourne’s linguistic and cultural diversity.^{25, 26}
- These communities have significantly contributed to Melbourne’s economy through small businesses, particularly in retail and hospitality sectors.²⁷

Darwin International Laksa Festival

The Darwin International Laksa Festival, held annually in October, showcases the city’s multicultural heritage with a cultural event that highlights Darwin’s diverse food scene. Laksa is celebrated as a cuisine that represents the fusion of Chinese and South-East Asian culinary traditions that have become integral to Darwin’s identity.²⁸

The festival attracts more than 7,000 visitors each year,²⁹ establishing Darwin as a culinary destination and enhancing the city’s vitality. The one-day Festival Finale attracts more than 5,000 people.³⁰

The festival takes an innovative approach to celebrating local cuisine and multiculturalism while also attracting tourists and boosting local businesses. More than 90 local eateries and businesses participate in the festival each year, and they report an average increase of \$5,000 in revenue during the festival month.³¹ The one-day Festival Finale alone injects an estimated \$275,000 into the local economy.³²

The Northern Territory and Australian governments primarily finance the festival through a combination of funding, with corporate sponsorships providing additional support. The Place Leaders Asia Pacific Awards recognised the festival’s leadership in best-practice placemaking.³³

ⁱ No further definition of this data is available. However, it is highly likely to be Torres Strait Creole.

Household income and net worth

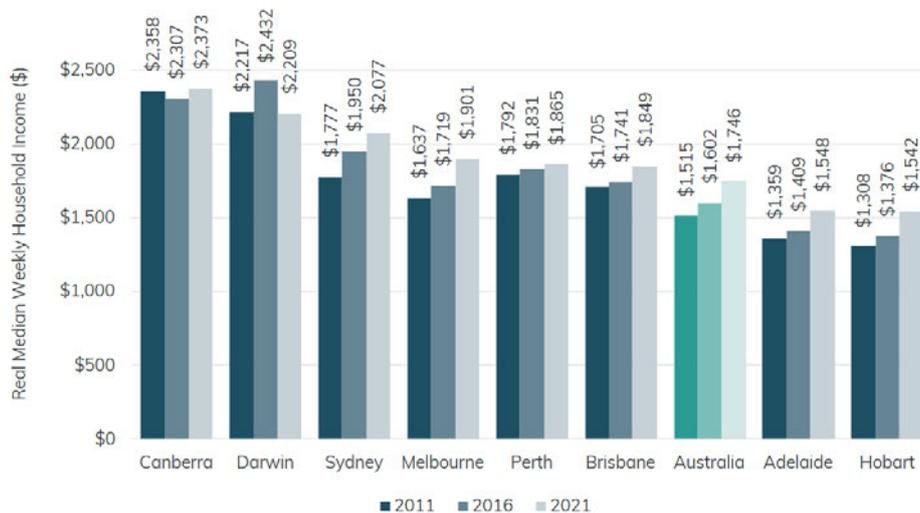
Income and wealth distribution data provide measurable indicators of economic conditions in Australian cities. Analysis of household income trends shows overall increases over the past decade, with variations across regions and socio-economic groups.

Between 2011 and 2021, there was an overall increase in national household income, and household net worth also increased between 2016 and 2020. 20% of households hold 62.8% of net worth nationally.³⁴

Household income growth

In 2021, the real median weekly household income nationally was \$1,746 (Figure 6), which is an increase of 15.2% since 2011. However, this growth was not uniform across capital cities. In 2021, the highest median weekly household income was in Canberra, while Hobart had the lowest. However, between 2011 and 2021 Hobart had the highest growth rate, at 17.9%, despite having lower real median weekly household income relative to other capital cities.

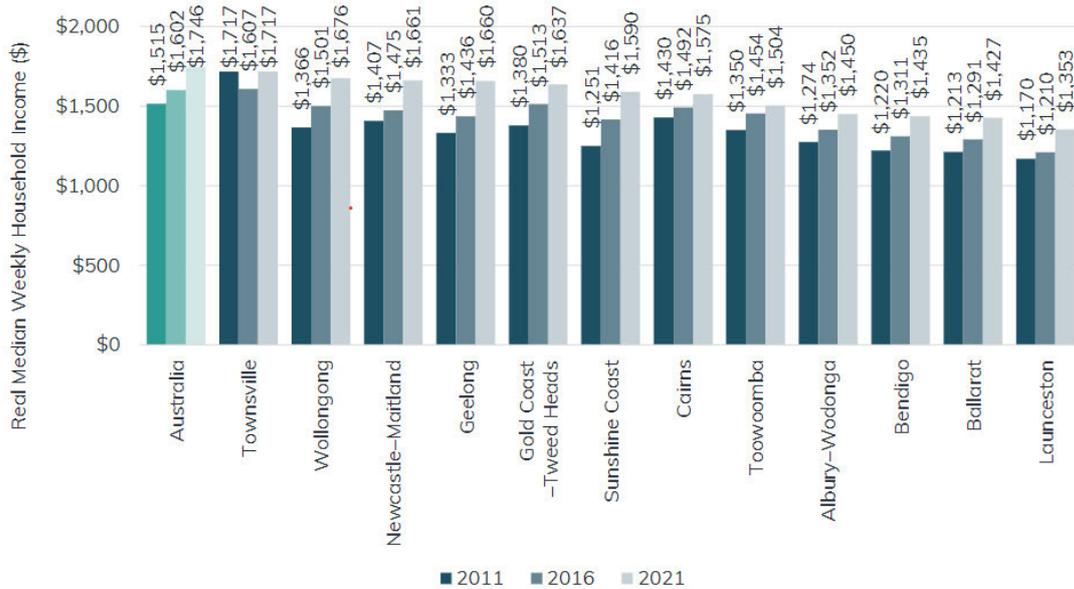
Figure 6: Real median weekly household income in capital cities, 2011, 2016 and 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (4 December 2023). Customised Report on Income and Wealth [Data Set].

All non-capital cities, except Townsville, experienced an increase in real median weekly household income between 2011 and 2021 (Figure 7). However, their incomes remained lower than the national median.

Figure 7: Real median weekly household income for non-capital cities, 2011, 2016 and 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (4 December 2023). Customised Report on Income and Wealth [Data Set].

Household net worth

Household net worth or wealth is calculated as the difference between the stock of household assets and the stock of household liabilities. This data is not available for non-capital cities.

Household net worth data for capital cities revealed significant variations between 2016 and 2020 (Figure 8). Sydney, Melbourne and Canberra exceeded the national median.

Figure 8: Real household net worth for capital cities, 2016, 2018 and 2020

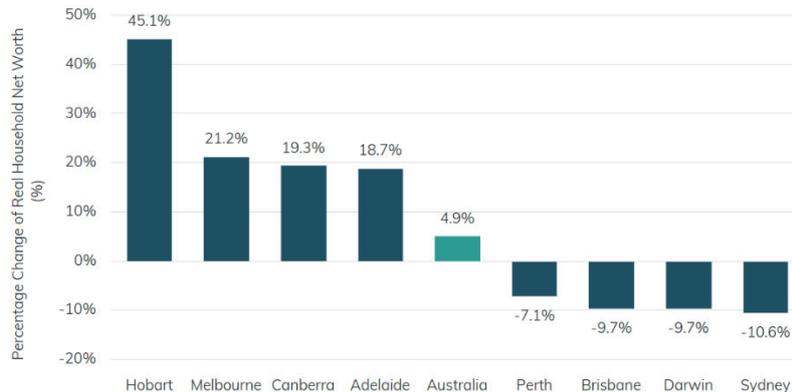


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (4 December 2023). Customised Report on Income and Wealth [Data Set].

From 2016 to 2020, Hobart experienced the largest increase (45.1%) in real household net worth of all Australian capital cities (Figure 9). This increase was over 9 times the national rate (4.9%). Also, Melbourne, Canberra and Adelaide exceeded the national rate of 4.9% increase. Sydney maintained the highest real

household net worth, but it decreased by 10.6% between 2016 and 2020. Real household net worth in Darwin, Brisbane and Perth also decreased in the same period.

Figure 9: Real household net worth: capital cities, percentage change, 2016 to 2020



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (4 December 2023). Customised Report on Income and Wealth [Data Set].

Impacts of COVID-19

The COVID-19 pandemic and subsequent economic factors have had an impact on household net worth:

- There was a 1% decline in mean real household net worth between 2018 and 2020, mostly driven by a decrease in the value of owner-occupied homes and other financial assets.³⁵
- Residential property transactions fell substantially in capital cities during the quarter ending June 2020.³⁶
- Residential property prices dropped the most in Sydney (2.2%) and Melbourne (2.3%) during this period.³⁷

Note: this wealth information was reported during the COVID-19 pandemic and before the Reserve Bank’s decision to increase the cash rate target from 0.35% in early 2022 to 4.35% in late 2023,³⁸ leading to increases in mortgage interest rates. These factors likely have further implications for wealth distribution that are not captured in this data.

Housing

In the Australian housing market there is a strong and continuing preference for larger homes. Also, labour shortages, material delays and input costs are hampering productivity in housing production, compounding affordability issues.³⁹

Housing affordability

Two key metrics used to measure housing affordability are the:

- median dwelling price to income ratio
- rent to income ratio.

These ratios give insights into the relative affordability of housing for both homeowners and renters.

The median dwelling price to income ratio increased in most capital and non-capital cities, indicating declining affordability for potential homeowners. Between 2021 and 2023 there was a trend of decreasing affordability in most major cities:

- Sydney had the highest ratio (9.0) among capital cities in 2023, followed by Hobart (7.7) and Melbourne (7.5).
- Some non-capital cities surpassed their state capitals in indicators of affordability. The Sunshine Coast (9.8), Wollongong (9.4) and Gold Coast–Tweed Heads (8.4) had higher ratios than many capital cities.
- Hobart and Adelaide experienced the largest increases in their ratios from 2021 to 2023.

The rent to income ratio also increased across the board:

- There were increases in all capital cities between 2021 and 2023. Perth, Darwin, Brisbane and Adelaide had the largest rises.
- Among non-capital cities, Gold Coast–Tweed Heads and Sunshine Coast had the highest rent to income ratios in 2023.

Housing affordabilityⁱⁱ is typically worse among renters than homeowners with a mortgage. Nationally in 2021, 35.4% of renters were spending more than 30% of their income on rent, while 16.3% of homeowners with a mortgage were spending more than 30% of their income on mortgage repayments.

The measures presented here cover the entire household income distribution:

- Among capital cities, Hobart had the highest percentage of households spending more than 30% of their income on rent (38.9%), followed closely by Sydney (38.3%), Adelaide (34.5%), Brisbane (34.4%) and Perth (33.7%).
- Sydney had the highest percentage of households spending more than 30% of their income on mortgage repayments (22.1%), followed by Melbourne (18.7%), Perth (15.5%), Adelaide (13.7%) and Darwin (13.5%).
- For non-capital cities, Gold Coast–Tweed Heads was the most unaffordable, with 46.8% of renters spending more than 30% of their income on rent and 18.0% of homeowners with a mortgage spending more than 30% of their income on mortgage repayments, followed by:
 - Sunshine Coast (renters, 44.0%; homeowners with a mortgage, 16.3%)
 - Wollongong (renters, 41.4%; homeowners with a mortgage, 15.9%)
 - Newcastle–Maitland (renters, 39.6%; homeowners with a mortgage, 12.9%)
 - Cairns (renters, 37.3%; homeowners with a mortgage, 12.9%)
 - Launceston (renters, 35.7%; homeowners with a mortgage, 9.8%).

These trends are further impacted by declining rental vacancy rates. Adelaide and Perth had rental vacancy rates below 0.5% as of September 2023. Brisbane (0.7%) and Hobart (0.8%) also have very low rental vacancy rates. This tight rental market contributes to the affordability challenges that renters face.

Average household size

Since the 1980s, the structure and composition of Australian households have undergone significant changes that reflect broader social and economic shifts in Australia. For example, average household size has declined from 2.9 persons per household in the 1980s to 2.3 persons in 2021.⁴⁰

In 2021, average household size in Australia's capital cities ranged between 2.4 and 2.7 persons. Between 2011 and 2021, household sizes in most capital cities were either declining or stable, with Adelaide being the exception. In non-capital cities there were:

- increases in Geelong, Launceston and Toowoomba
- decreases in Townsville and Wollongong
- stable numbers, at 2.4 or 2.5 persons, in other non-capital cities.

The *State of the Housing System 2024* report estimates that, if the average household size had remained at 3.3 persons (as it was in 1971) rather than 2.5 persons (as it was in 2021), Australia would require almost 25% fewer dwellings to accommodate its current population.⁴¹ While the average household size stabilised briefly in the early 2000s, recent data indicate volatility due to factors such as:

- migration patterns
- changing household preferences
- economic pressures including rising living costs.⁴²

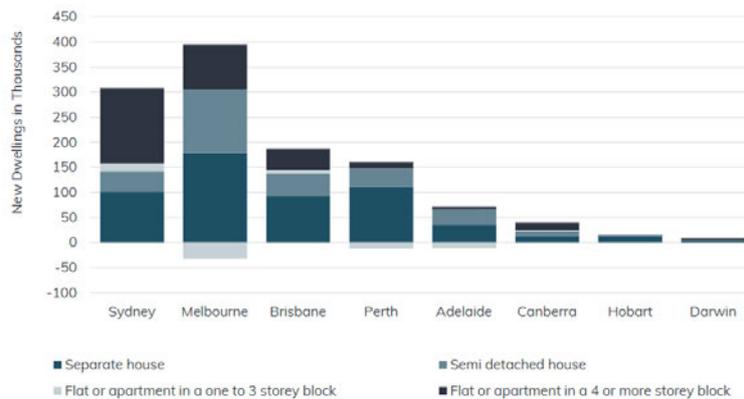
ⁱⁱ Rental affordability is determined if rent payments are less than or equal to 30% of household income. Mortgage affordability is determined if mortgage repayments are less than or equal to 30% of household income.

Housing density

Between 2011 and 2021, dwelling stock in the major cities increased by 1.1 million. At the city level:

- Separate/detached houses accounted for approximately half of housing growth in most capital cities, except Sydney and Canberra (Figure 10).
- Melbourne added the highest number of separate houses (178,627).
- Sydney had the largest increase in apartment dwellings (165,522), with 90% in buildings of 4 or more storeys.
- Melbourne, Perth and Adelaide had a smaller proportion of high-density dwelling growth and a decline in the proportion of medium-density dwellings (flats or apartments in 1 to 3 storey blocks).

Figure 10: Changes in new dwelling mix in Australian capital cities, 2011 to 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 March 2024). Customised Report on Density in Australian Cities [Data Set].

In the five largest capital cities:

- Outer-city ring areas had the highest levels of housing growth (between 2011 to 2021) and new residential building approvals (between 2021 to 2023).
- Low-density separate housing remained predominant in outer-city ring areas.
- Sydney’s residential building approvals for medium and higher-density housing (between 2021 and 2023) nearly matched those for separate houses.
- Higher density living was largely concentrated in inner-city ring areas.
- In Melbourne and Sydney there have been increases in the number of higher density dwellings across all parts of their cities.

From 2020 to 2023:

- Residential building approvals declined by an average of 10.5% across capital cities between 2020 and 2023, due to slowed construction outputs flowing from COVID-19 and increased costs.
- Sydney and Canberra were the only capital cities to have stronger growth in building approvals for medium and higher density dwelling types—as opposed to low-density separate housing.

Home ownership

In 2021 nationally:

- 35% of households owned their homes with a mortgage
- 32% owned their homes outright.

The majority of Australian households in capital cities held a home ownership share exceeding the national total (67%), except:

- Brisbane, 62.7%
- Sydney, 61.7%
- Darwin, 53.9%.

Home ownership in capital cities in 2021 was highest in:

- Perth, 71.1%
- Hobart, 69.0%
- Adelaide, 68.7%.

Over the last decade, the number of homes owned outright and owned with a mortgage have gradually declined and rental tenure has increased in most capital cities. The largest change was in Sydney—between 2011 and 2021, the number of homes with rental tenure rose from 31% to 37% and the number of homes owned outright and owned with a mortgage tenure declined.

Home ownership in non-capital cities in 2021 was highest in:

- Geelong, 70.2%
- Sunshine Coast, 69.7%
- Wollongong and Bendigo, 68.5%.

Non-capital cities with the lowest proportions of home ownership were:

- Toowoomba, 63.8%
- Albury–Wodonga, 63.7%
- Cairns, 61.8%
- Townsville, 59.5%.

First Nations home ownership in cities

Closing the Gap Target 9a aims to increase the proportion of Aboriginal and Torres Strait Islander people living in appropriately sized (not overcrowded) housing to 88% by 2031.⁴³ First Nations home ownership is growing across Australia, with 42.3% of First Nations people owning their homes nationally in 2021 (39.6% in 2016).

Several cities demonstrate strong outcomes for First Nations home ownership:

- Hobart, 52.2%
- Sunshine Coast, 51.3%
- Newcastle–Maitland, 48.2%.

The lowest rates of home ownership were in:

- Townsville, 34.6%
- Cairns, 32.2%.

Between 2016 and 2021, the largest increases in home ownership were in:

- Sunshine Coast, 6.5 percentage points
- Bendigo, 6.4 percentage points
- Launceston, 5.9 percentage points.

Darwin had the largest decrease (–3.7 percentage points).

The distinct pattern that emerges in the capital cities is that First Nations home ownership is consistently higher in outer-city ring areas than in inner-city ring areas. There are higher rates of home ownership in outer city ring areas compared to inner city ring areas. This may be explained by multiple factors including affordability, appropriateness of housing in the region and connection to community.⁴⁴

Social housing

‘Social housing’ captures those who rent from a state or territory housing authority or a community housing provider.⁴⁵

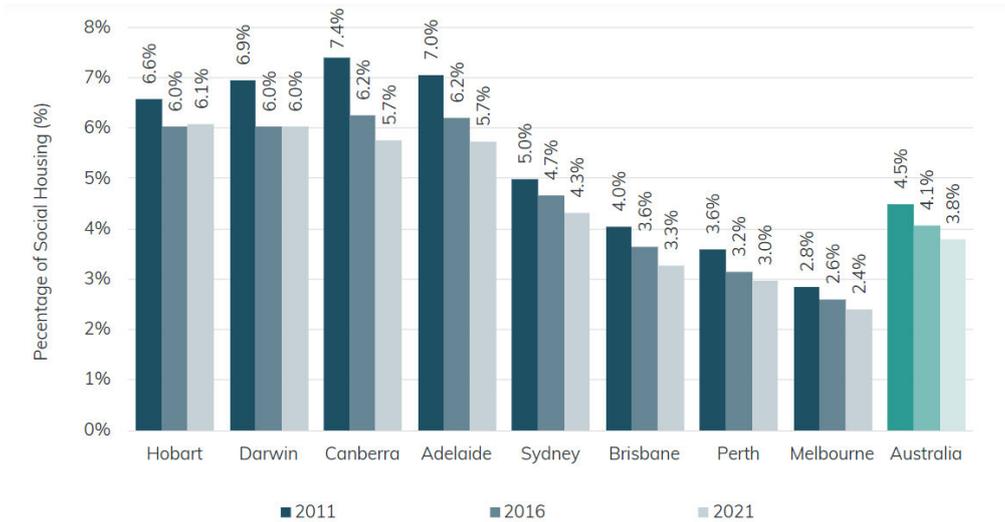
Nationally, between 2011 and 2021, social housing as a proportion of all housing stock decreased from 4.5% to 3.8% (Figure 11). This downward trend is seen across all of the capital cities apart from Darwin and Hobart, where proportions of social housing decreased between 2011 and 2016 before stabilising in 2021.

Adelaide’s middle-city ring areas have the highest proportion of social housing (6.6%), followed by:

- Adelaide’s inner-city ring area, 5.6%
- Melbourne’s inner-city ring area, 5.0%
- Adelaide’s outer-city ring area, 4.9%.

Sydney’s social housing is evenly distributed across all rings, with a social housing share of between 4.2% and 4.5% in each ring. In Melbourne and Perth, social housing contributes a relatively high share of dwellings in the inner-city ring areas, while the share is lower in the middle-city ring areas and lower again in the outer-city ring areas.

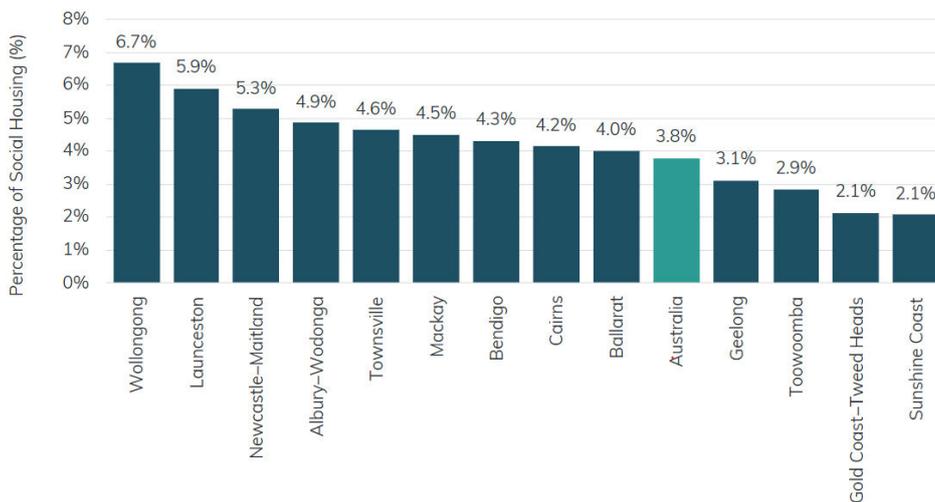
Figure 11: Social housing as a proportion of all housing in capital cities, 2011, 2016 and 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 September 2023). Customised Report on Housing Affordability [Data Set].

In 2021, among the non-capital cities, Wollongong had the highest proportion of social housing and the Sunshine Coast had the lowest (Figure 12).

Figure 12: Social housing as a proportion of all housing in non-capital cities, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 September 2023). Customised Report on Housing Affordability [Data Set].

Viv's Place redefines urban housing for women

Viv's Place in Dandenong, Melbourne, is purpose-built urban housing that gives safety, security and support to women and children fleeing domestic violence and homelessness. It contributes to Melbourne's social housing landscape by offering safe, high-quality and permanent housing for women and children who are experiencing disadvantage, while promoting independence and healing. It features trauma-informed design, vibrant colours and homely motifs, creating a welcoming urban home.⁴⁶

Viv's Place has 60 self-contained apartments providing permanent housing for up to 60 women and 130 children.⁴⁷ Residents have access to:

- onsite wrap-around support services including health, education and legal assistance⁴⁸
- communal spaces including kitchen, living areas and children's play areas to foster community⁴⁹
- a 24-hour concierge service for enhanced security⁵⁰
- other local services for holistic support.⁵¹

Viv's Place demonstrates how cities can address complex social issues holistically through thoughtful design and integrated support services. It offers a comprehensive approach to homelessness and domestic violence by not only providing shelter but also breaking cycles of homelessness by improving health outcomes, supporting education and fostering community connections.⁵²

Viv's Place's success is underpinned by strategic partnerships between government, non-profit organisations and community services. The \$30 million project was funded through collaboration between the Victorian Government, Launch Housing and philanthropic donors.⁵³

Disadvantage across cities

The Index of Relative Socio-Economic Disadvantage (IRSD) provides a comprehensive measure of socio-economic conditions within geographic areas. It is one of four Socio-Economic Indexes for Areas (SEIFA) produced by the Australian Bureau of Statistics (ABS) every five years using Census data.

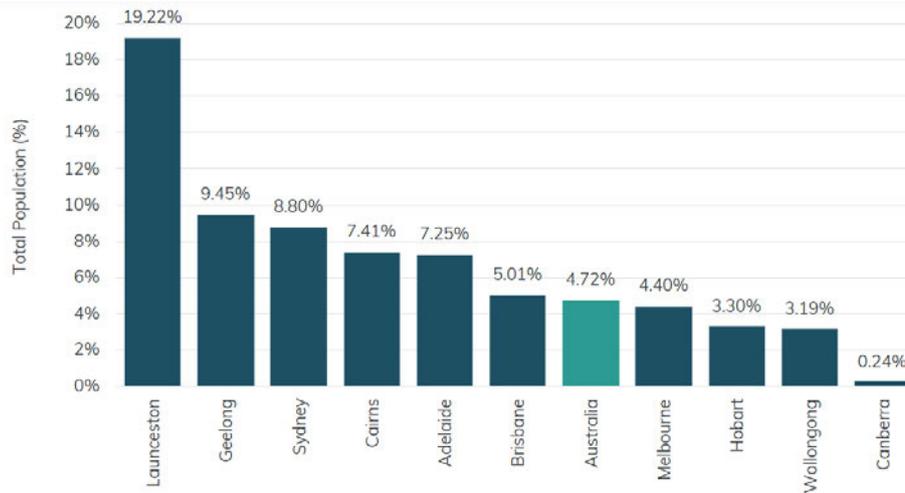
The IRSD assesses data at the Statistical Areas Level 2 (SA2) scale, which is roughly equivalent to a suburb.⁵⁴ A lower IRSD score indicates higher disadvantage. Areas in the bottom 5% of SA2s on the IRSD are said to be in 'severe disadvantage'. IRSD is only a measure of relative disadvantage and is broad rather than a specific (for example, it may measure low income).

As of 2021:

- nearly one million Australians (4.7% of the population) lived in severely disadvantaged areas
- 81.7% of people in severely disadvantaged areas lived in Australia's largest cities.

The proportion of residents living in severely disadvantaged areas varies significantly among the major cities. As of 2021, 10 of the largest 20 cities contain SA2s with residents experiencing severe disadvantage. The number of residents living in the lowest 5% of the IRSD was highest in Launceston and lowest in Canberra (Figure 13).

Figure 13: Proportion of population that lives in an SA2 in the bottom 5% of the Index of Relative Socio-Economic Disadvantage, 2021



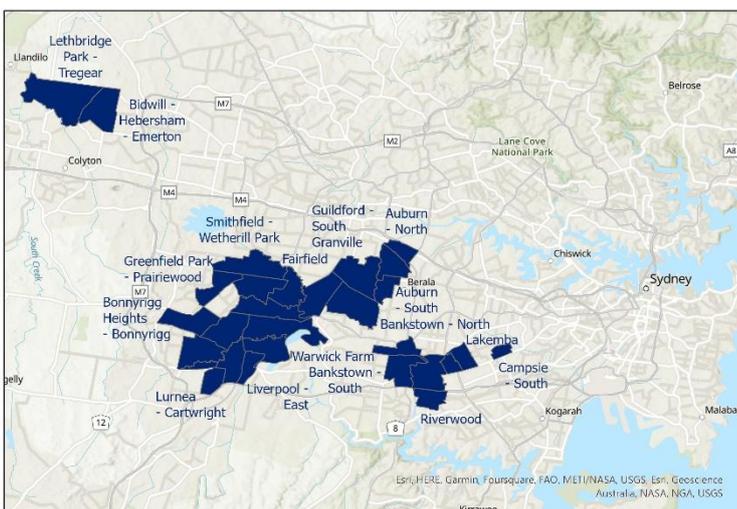
Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (11 January 2024). Customised Report on Severe Disadvantage [Data Set].

Perth and Darwin are the only capital cities without an SA2 in the bottom 5%, although both cities have areas just outside this range. Not everyone who lives in a severely disadvantaged SA2 is experiencing disadvantage. In some cases, such as in Geelong, 2% of residents in severely disadvantaged SA2s live in SA1s ranked in the least disadvantaged 10% nationally.

Severe disadvantage can be viewed at the city level. However, by breaking down disadvantage by SA2, it is possible to see where disadvantage within cities tends to be concentrated. Severe disadvantage across Australia’s four largest cities tended to be clustered in the middle- and outer-city ring areas and is not evenly distributed:

- **Sydney:** Severe disadvantage is clustered in the west, with a large concentration from Auburn to Bonnyrigg (Figure 14).
- **Melbourne:** Severe disadvantage is scattered across the city in medium to small clusters, with the largest around Dandenong (Figure 15).
- **Brisbane:** Severe disadvantage forms a band in the south, stretching from the coast to west of Ipswich (Figure 16).
- **Adelaide:** Severe disadvantage is concentrated in the northern suburbs of Elizabeth, Salisbury and Davoren Park (Figure 17).

Figure 14: SA2s that are in the bottom 5% of the 2021 IRSD in Sydney



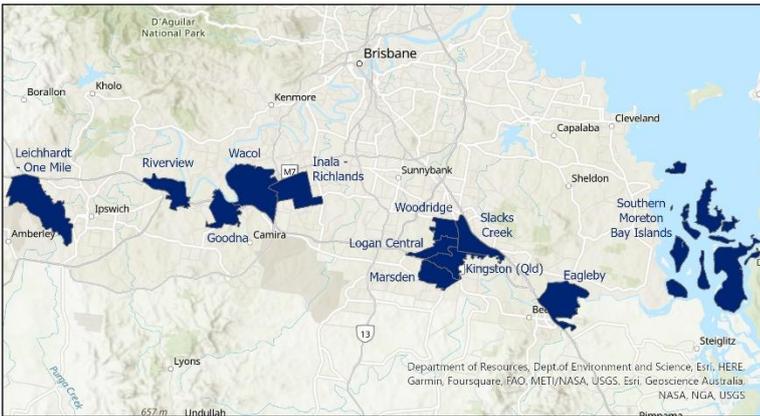
Source: [ABS] Australian Bureau of Statistics. (2021). *Socio-Economic Indexes for Areas (SEIFA)*.

Figure 15: SA2s that are in the bottom 5% of the 2021 IRSD in Melbourne



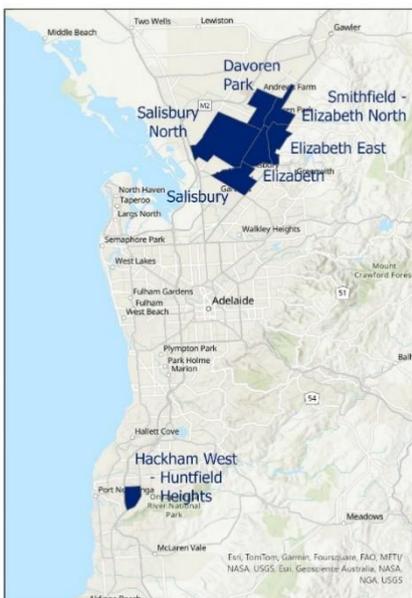
Source: [ABS] Australian Bureau of Statistics. (2021). *Socio-Economic Indexes for Areas (SEIFA)*.

Figure 16: SA2s that are in the bottom 5% of the 2021 IRSD in Brisbane



Source: [ABS] Australian Bureau of Statistics. (2021). *Socio-Economic Indexes for Areas (SEIFA)*.

Figure 17: SA2s that are in the bottom 5% of the 2021 IRSD in Adelaide



Source: [ABS] Australian Bureau of Statistics. (2021). *Socio-Economic Indexes for Areas (SEIFA)*.

Even within severely disadvantaged SA2s, there can be significant variation at the SA1 level, highlighting the complex nature of socio-economic disadvantage.

Most SA2s classified as severely disadvantaged in 2016 remained so in 2021, indicating that area-level disadvantage is relatively stable over time. While areas tend to maintain their level of disadvantage, individual citizens' experiences vary. People who move residences are more likely to experience a change in their level of disadvantage than those who remain in the same location.

Homelessness

The *National Housing and Homelessness Plan issues paper*⁵⁵ reported that homelessness can affect anyone, and it is caused by multiple, intersecting structural and systemic factors. Certain groups are disproportionately more likely to experience homelessness:

- Men comprise 56% of the homeless population, but women accounted for 82% of the increase in homelessness between 2016 and 2021.
- Women's homelessness is often 'hidden' or 'invisible', as women are more likely to stay with family or friends, in a garage or in their car.
- Between 2016 and 2019 the number of older men (55 and over) experiencing homelessness increased by 3%, but the rate decreased from 39 to 34 per 10,000.
- Between 2016 and 2021 the number of older women (55 and over) experiencing homelessness increased by 7%, but the rate decreased from 20 to 19 per 10,000.
- Young people (12–24 years) are over-represented, with 71 per 10,000 experiencing homelessness in 2021—37% of all homeless people were aged 24 or younger.
- Children under 12 were the fastest growing homelessness cohort. Between 2016 and 2021 the number increased by 11.2% and the rate rose from 45 to 48 per 10,000.
- First Nations people are about 9 times more likely than non-First Nations people to experience homelessness (307 per 10,000).
- Around 46% of all homelessness in 2021 were people born overseas. They were primarily living in severely overcrowded dwellings and boarding houses.
- Young people leaving formal out-of-home care are at risk of homelessness, with 30% experiencing homelessness within their first year of exiting care.
- A 2021 study found that 23.6% of young LGBTQIA+ people aged 14 to 21 had experienced homelessness in their lifetime.
- People exiting institutions, particularly ex-prisoners, are more likely to access homelessness services.
- People with disability and veterans may experience higher rates of homelessness or face barriers in accessing support, though more research is needed in these areas.

The ABS uses six operational groups for presenting estimates of the number of people experiencing homelessness:

- people living in improvised dwellings, tents or sleeping out
- people living in supported accommodation for the homeless
- people staying temporarily with other households
- people living in boarding houses
- people in other temporary lodgings
- people living in 'severely' overcrowded dwellings.⁵⁶

The ABS also compiles estimates for the following three groups of people who may be marginally housed but are not classified as homeless:

- people living in other crowded dwellings
- people in other improvised dwellings
- people marginally housed in caravan parks.⁵⁷

In 2021, 122,494 people (0.5% of Australians) were identified as homeless. The number of homeless Australians has increased by 6,067 persons since 2016 and 20,055 persons since 2011. A further 93,186

persons of Australians (0.4%) were identified as marginally housed in 2021. The living arrangements of these people are close to the statistical boundary of homelessness, and the person may be at risk of homelessness.

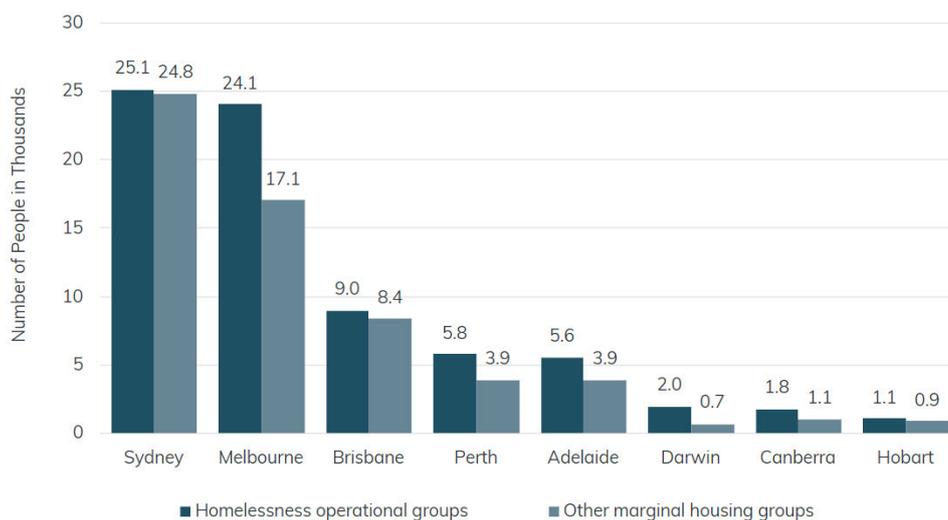
The national homelessness rate has remained relatively stable:

- 48 per 10,000 in 2011
- 50 per 10,000 in 2016
- 48 per 10,000 in 2021.⁵⁸

The majority (63%) of people experiencing homelessness in Australia are located in capital cities.⁵⁹ In 2021, across Australia’s major cities, Darwin had the highest proportion of homelessness (1.3%). In total numbers, the highest number of homeless persons was in Sydney, closely followed by Melbourne, while Canberra and Hobart had the lowest (Figure 18).

Inner-city rings consistently have higher homelessness rates. Sydney’s inner-city ring area has the highest proportion (1.0%), followed by Melbourne’s inner-city ring area (0.7%) and Brisbane’s inner-city ring are (0.6%).

Figure 18: Number of people in homelessness operational groups and other marginal housing groups in capital cities, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 May 2024). Customised Report on Homelessness [Data Set].

In 2021, the highest proportions of homelessness in the non-capital cities were in:

- Cairns, 0.7%
- Ballarat, 0.57%.

Gold Coast–Tweed Heads, despite having the lowest percentage (0.34%), had the highest number of homeless people (2,170) among the non-capital cities. Wollongong and Sunshine Coast also had the lowest percentage of homeless people (0.34%).

First Nations people and homelessness

The ABS has acknowledged that standard definitions of homelessness may not fully capture First Nations perspectives and experiences of housing security. While First Nations people are over-represented in the current measures of homelessness, there are likely aspects of homelessness unique to First Nations experiences that are not adequately reflected in these statistics. For example, the ‘Persons living in “severely” crowded dwellings’ category⁶⁰ shows a significant over-representation of First Nations people.

Housing security contributes to Outcome 9 of the Closing the Gap framework, which aims to ensure First Nations people can access appropriate, affordable housing aligned with their priorities and needs.⁶¹ The data shows:

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- In 2021, the national rate of homelessness was 307 per 10,000 First Nations people nationally. First Nations people were 9 times more likely to experience homelessness than non-First Nations people (35 per 10,000). When compared to the overall national homelessness rate of 48 per 10,000, First Nations people are about 6 times more likely to experience homelessness. An additional 166 per 10,000 First Nations people experienced marginal housing conditions.
- Among capital cities, housing security varied significantly:
 - Hobart demonstrated stronger housing outcomes (First Nations homelessness rate of 115 per 10,000)
 - Darwin faced more complex housing challenges (First Nations homelessness rate of 826 per 10,000)
 - Remote and Very Remote areas presented unique housing considerations, with different patterns of homelessness (1,771 per 10,000).⁶²

In 2021, appropriately sized housing for First Nations people varied significantly across major cities. While the national rate was 81.4%, three capital cities exceeded Closing the Gap Target 9a⁶³ of 88%:

- Canberra, 90.8%
- Melbourne, 90.0%
- Sydney, 88.2%.

The lowest rates were recorded in:

- Perth, 86.3%
- Adelaide, 86.2%
- Darwin, 79.4%.

Common Ground Dickson tackles urban homelessness

Common Ground Dickson in Canberra, ACT, is a supportive housing project for people who are currently experiencing disadvantage. It is demonstrating better practice in addressing homelessness, taking an innovative approach to tackling the challenges of increasing costs and homelessness that cities face. By integrating housing and onsite services, Common Ground Dickson shows how cities can address the complex, interrelated issues of homelessness, poverty and social exclusion.

The project enhances urban equity by targeting 2 key groups:

- those experiencing chronic homelessness
- low-income earners struggling to access affordable housing in the private market.⁶⁴

Common Ground Dickson has 40 self-contained units, offering a mix of social and affordable housing.⁶⁵ Residents benefit from:

- onsite support services that improve access to health, education and employment opportunities⁶⁶
- environmentally sustainable design, reducing ongoing living costs for residents⁶⁷
- a strategic inner-city location, enhancing access to jobs and services⁶⁸
- communal spaces and a potential social enterprise café, promoting community engagement.⁶⁹

Common Ground Dickson's success rests on its use of a collaborative model, involving the ACT Government, community housing providers and support services to ensure residents receive not just housing but also comprehensive support, providing a stable base from which residents can access education, employment and health services.^{70,71}

Access to services

Geographic distribution of services varies within and between cities, with differences in accessibility across urban areas.

The Methodology chapter elaborates on access to service indices, which the Australian Urban Observatory (AUO) measures by dwelling proximity to key infrastructure and amenities.

Health

Australia's life expectancy ranks fourth globally.⁷² Geographic analysis of health infrastructure distribution in major cities shows variations in accessibility patterns. These variations intersect with demographic trends such as population ageing and chronic disease prevalence rates.

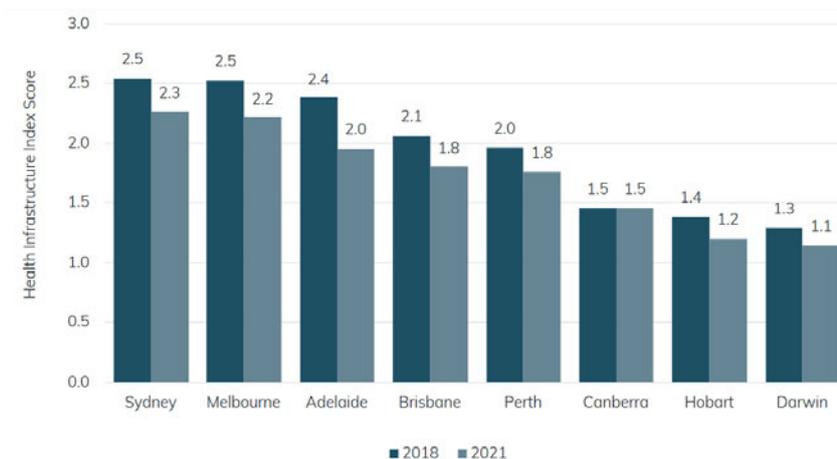
AUO measures access to health infrastructure based on dwelling proximity to:

- residential aged care (1 km)
- dentists (1 km)
- general practitioners (1 km)
- maternal, child and family health centres (1 km)
- other community healthcare centres (1 km)
- pharmacies (1 km).

Among the capital cities in 2021, health infrastructure access was highest in Sydney and lowest in Darwin. Average access declined slightly across capital cities from 2018 to 2021 (Figure 19). This is possibly due to an increase in the number of dwellings that are further away from existing infrastructure rather than a decrease in infrastructure.⁷³

Brisbane reveals a significant disparity. Its inner-city ring area dwellings have three times more access to health infrastructure than outer-city ring areas. Toowoomba leads in health infrastructure access despite having half the population of other top five cities.

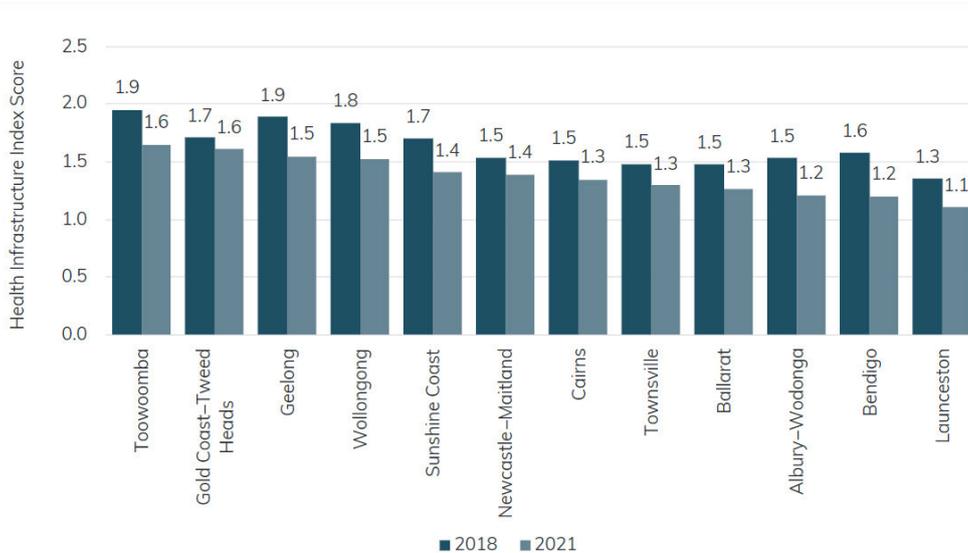
Figure 19: Access to health infrastructure index by capital city, 2018 and 2021



Source: [AUO] Australian Urban Observatory. (2024). Customised Report on Access to Services at the City Level [Data Set].

Non-capital cities' access to health infrastructure is more evenly distributed and is comparable to the smaller capital cities of Canberra, Hobart and Darwin (Figure 20).

Figure 20: Access to health infrastructure index by non-capital city, 2018 and 2021



Source: [AUO] Australian Urban Observatory. (2024). Customised Report on Access to Services at the City Level [Data Set].

First Nations people

Closing the Gap Target 1 aims to close the gap in life expectancy within a generation, by 2031.⁷⁴ First Nations people born in 2020–2022, can expect to live to 71.9 years for males and 75.6 years for females,⁷⁵ which is more than 8 years lower than the non-First Nations population. Life expectancy for First Nations people varied by location:

- In major cities, life expectancy is slightly higher at 72.5 years for men and 76.5 years for women.
- In remote and very remote areas, life expectancy drops to 67.3 years for men and 71.3 years for women.⁷⁶

The disparity in life expectancy is most pronounced in remote and very remote areas, where the gap between First Nations and non-First Nations populations widens to 12 years.

Data for Target 1 is not available at the individual city level, and major cities, remote and very remote areas are based on the ABS remoteness areas structure.

Health for First Nations people is holistic; it encompasses physical, social, emotional, cultural, spiritual and ecological wellbeing at an individual and community level.⁷⁷ Accordingly, there are several Closing the Gap socio-economic targets that aim to improve the physical (1), social and emotional wellbeing (14), as well as cultural wellbeing (16).⁷⁸ Access to healthcare services that are culturally safe is essential for improving First Nations Health outcomes. The 2018–19 health data shows that 67% of First Nations people manage one or more long-term health conditions.⁷⁹ The unique impacts of colonisation and the protective factors found in First Nations culture highlight the essential role of Aboriginal and Torres Strait Islander Community-Controlled Organisations (ACCOs).⁸⁰ Strengthening the capacity of ACCOs to deliver community services is a key aspect of Closing the Gap Priority Reform 2.⁸¹ Other protective factors for health and wellbeing include strong family and kinship connections, as well as connection to culture and Country.⁸²

Mental health and wellbeing are particularly significant, with strong family and kinship connections playing a vital role in supporting positive outcomes.⁸³

First Nations people demonstrate higher rates of disability engagement with support services.

People with disability

Disability affects 21.4% of Australians (5.5 million people).⁸⁴ For people with a disability, community participation requires accessible housing, transport, communication and built environments. However, data for access to services for people with disability is not currently available at the city level.

Australia’s Disability Strategy 2021–2031 commits all levels of government to creating inclusive communities through:

- accessible and affordable housing choices
- inclusive built environments and transport systems
- accessible information and communication systems
- full participation in social, cultural and recreational life.⁸⁵

Education

As Australia’s cities continue to grow, they require accessible, high-quality education from early childhood through to tertiary levels.

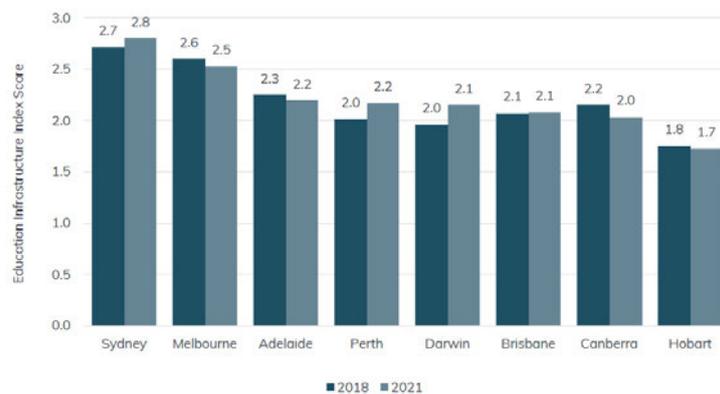
AUO measures access to education infrastructure based on dwelling proximity to:

- child care (0.8 km)
- out of school hours care (1.6 km)
- government primary schools (1.6 km)
- government secondary schools (1.6 km).

Sydney and Melbourne had the highest levels of access to education in 2018 and 2021 (Figure 21). Inner-city ring areas had higher access to education than outer-city ring areas, but the difference between them is smaller than access for other services. This may be because there is a high proportion of children (0–14 years) living in the outer-city ring areas. However, the distance between dwellings and education services is greater in outer-city ring areas. That means more households are outside the AUO’s distance thresholds.

For more information on the role of education in supporting a skilled workforce, see the ‘Productive and innovative’ chapter.

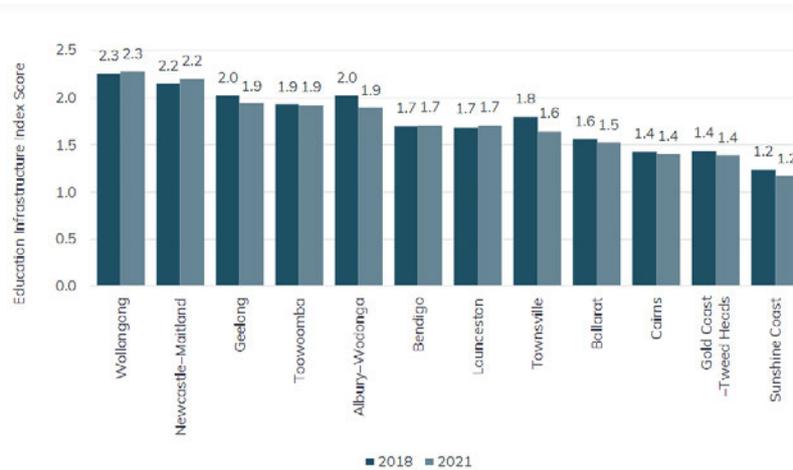
Figure 21: Access to education infrastructure index for Australia’s capital cities, 2018 and 2021



Source: [AUO] Australian Urban Observatory. (2024). Customised Report on Access to Services at the City Level [Data Set].

The non-capital cities generally had lower access to education infrastructure than the capital cities (Figure 22).

Figure 22: Access to education infrastructure index for Australia’s non-capital cities, 2018 and 2021



Source: [AUO] Australian Urban Observatory. (2024). Customised Report on Access to Services at the City Level [Data Set].

First Nations people

Closing the Gap Target 6 aims to increase the proportion of Aboriginal and Torres Strait Islander people aged 25–34 years who have completed a tertiary qualification (Certificate III and above) to 70% by 2031.⁸⁶ Educational outcomes improve when Aboriginal and Torres Strait Islander students have access to early childhood education and culturally safe schooling, which can support broader life opportunities including improved health, housing and employment prospects.⁸⁷ In 2021, 47% of First Nations people had a tertiary qualification of Certificate level III or above compared to 74.9% of all Australians. Highest levels of attainment were in:

- Canberra 64.9%
- Gold Coast–Tweed Heads 62.9%
- Melbourne 62.3%
- Wollongong 61.3%.

Lowest levels of attainment were in:

- Perth 45.3%
- Townsville 44%
- Darwin 39.2%.

Closing the Gap Target 7 aims to increase the proportion of Aboriginal and Torres Strait Islander youth (15–24 years) who are in employment, education or training to 67% by 2031.⁸⁸ In 2021, 58.0% of First Nations people aged 15–24 years were fully engaged in work, education or training compared to 78.8% of all Australians.

Cities with the highest rate were:

- Canberra 74.5%
- Melbourne 69.2%
- Sunshine Coast 67.5%

Cities with the lowest rates were:

- Adelaide 59.6%
- Bendigo 59.6%
- Albury–Wodonga 59.2%
- Cairns 56.1%.

Child care

For Australia’s major cities, the ratio of Centre-based Day Care (CBDC) child care places to child population is below one, indicating there are fewer child care places available than the number of children in each city.ⁱⁱⁱ This data reflects anticipated outcomes, given child care usage patterns and the use of other early childhood education and care types such as Preschool or Family Day Care. Many children do not require a full-time place in CBDC.^{iv}

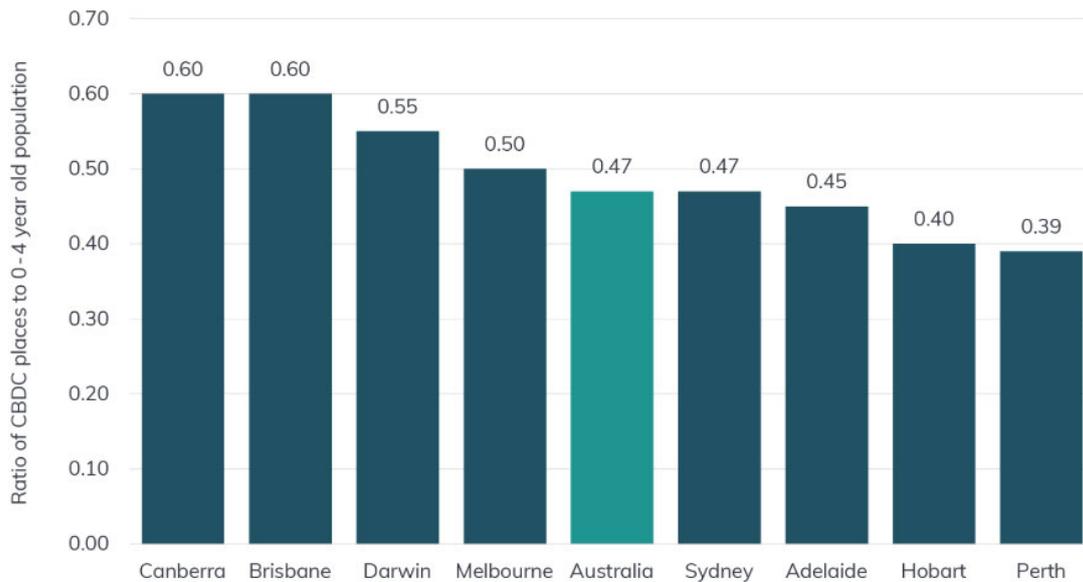
- The capital cities ratio was 0.5 (Figure 23).
- The non-capital cities ratio was also 0.5 (Figure 24).

This data shows non-capital cities have marginally better child care availability compared to capital cities. The Australian Competition and Consumer Commission (ACCC) found that child care markets in Australia are not uniformly delivering accessibility and affordability, and that market forces alone are not adequately meeting the needs of all children and households.⁸⁹ As of 2023, nearly half of one-year-olds and about 90% of four-year-olds attended some form of early childhood education and care (ECEC), though not all children and families benefit equally from these services.⁹⁰

Insufficient child care places can result in:

- lower female workforce participation
- unequal access between different socio-economic groups.⁹¹

Figure 23: Ratio of CBDC child care places to 0-4-year-old population ratio by capital cities, 2021

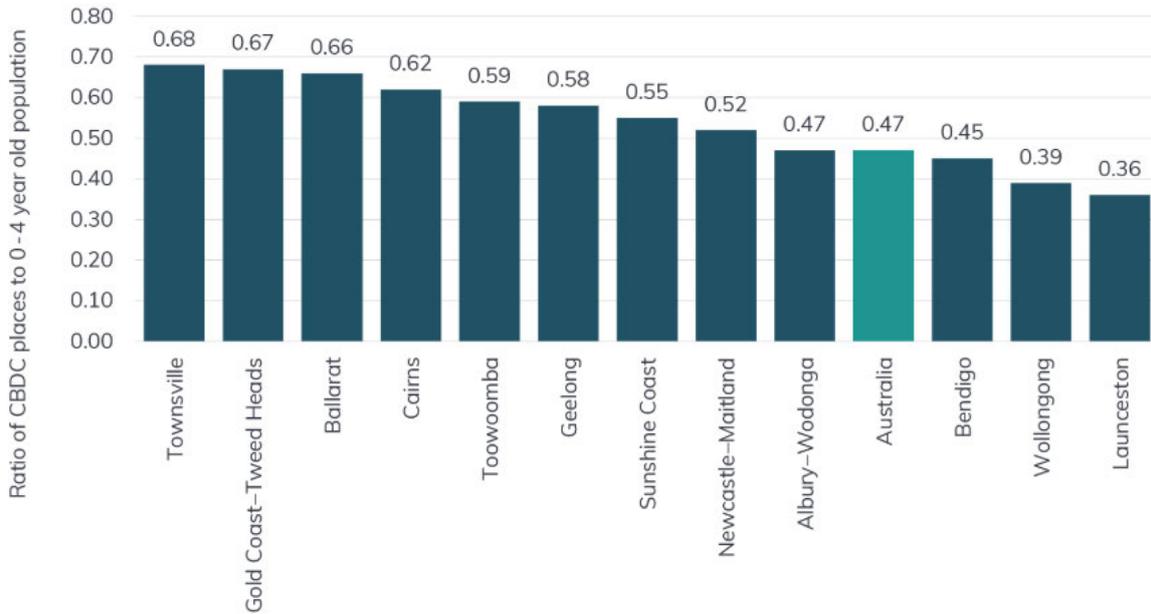


Source: Australian Children's Education and Care Quality Authority (ACECQA) National Register, ABS Census of Population and Housing, 2021.

ⁱⁱⁱ Child Care places data is limited to CBDC services only. Family Day Care, In Home Care, Out of School Hours Care and preschool places have been excluded. Places data may therefore be undercounted.

^{iv} Children aged four may not require a CBDC place if they receive their preschool exclusively at dedicated preschools. Child care places to population data is not directly comparable across states given the different approaches to preschool delivery. In some jurisdiction’s preschool is delivered mostly via CBDC while in others the majority of preschool aged children attend dedicated preschools and may not use child care. The use of formal Child Care is not compulsory, some families may choose other arrangements such as informal care.

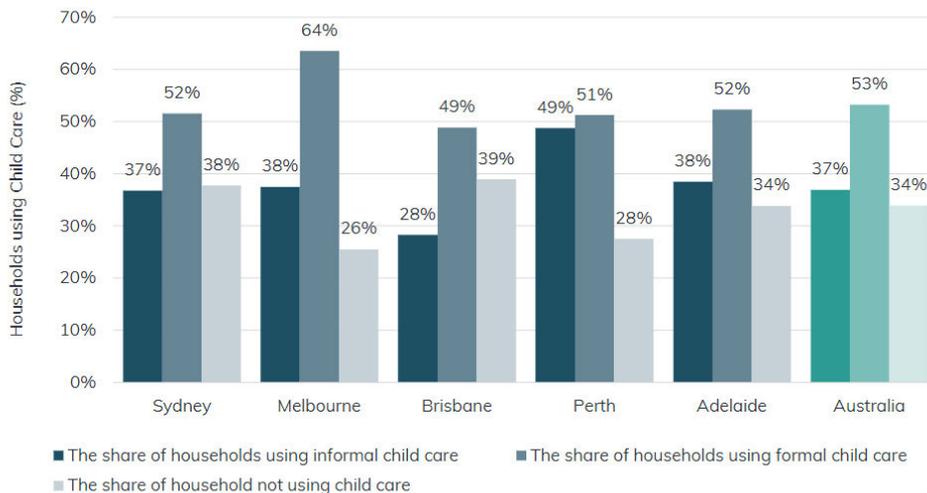
Figure 24: Ratio of CBDC child care places to 0-4-year-old population by non-capital cities, 2021



Source: Australian Children's Education and Care Quality Authority (ACECQA) National Register, ABS Census of Population and Housing, 2021. The Household, Income and Labour Dynamics in Australia (HILDA) child care survey outlines the types of child care used by households in Australia's five largest cities. In 2022, formal care is the most common type of child care for households with children aged 0 to 4 (Figure 25).

In 2022, Perth had the highest share of informal care usage at 49%. This correlates with Perth having the lowest child care places to child population ratio (0.3) among the five largest cities.

Figure 25: The share of households with children aged 0 to 4 using informal and formal child care, 2022



Source: BCARR analysis of Household, Income and Labour Dynamics in Australia (HILDA) Survey wave 22 data (the General Release version).

Open spaces

AUO measures access to open space by measuring the percentage of dwellings that are within 400 metres of public open space larger than 1.5 hectares.

Access to public open spaces varies across urban areas, influenced by:

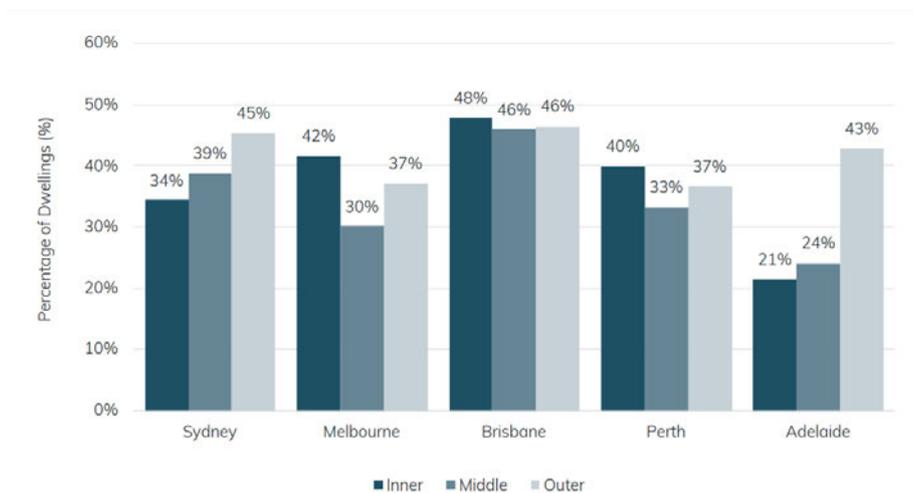
- historical development patterns

- city size
- urban planning strategies
- proximity to natural features like coastlines or reserves.

In 2021, three of Australia’s major cities had levels of access to public open space above 50%:

- Canberra leads with 66.3% access, reflecting its planned-city design influenced by the garden city movement. Of the capital cities, Sydney was at 45.9% and Brisbane was at 40.7%.
- Newcastle–Maitland (50.7%) and Gold Coast–Tweed Heads (50.3%) showed high access rates.
- Uniquely, Sydney and Adelaide show higher levels of access in outer-city ring areas, decreasing towards the middle- and inner-city ring areas (Figure 26).
- Adelaide, Darwin and Hobart were among the five cities with the lowest access to public open space.
- Launceston (24.9%) and Toowoomba (24.4%) recorded the lowest access to public open space among the studied cities.

Figure 26: Percentage of dwellings within 400 m of public open space larger than 1.5 ha in BCARR city rings, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 May 2024). BCARR Analysis of Australian Urban Observatory Data and Australian Bureau of Statistics, Census of Population and Housing 2021 Data. [Data Set].

Cultural and leisure infrastructure

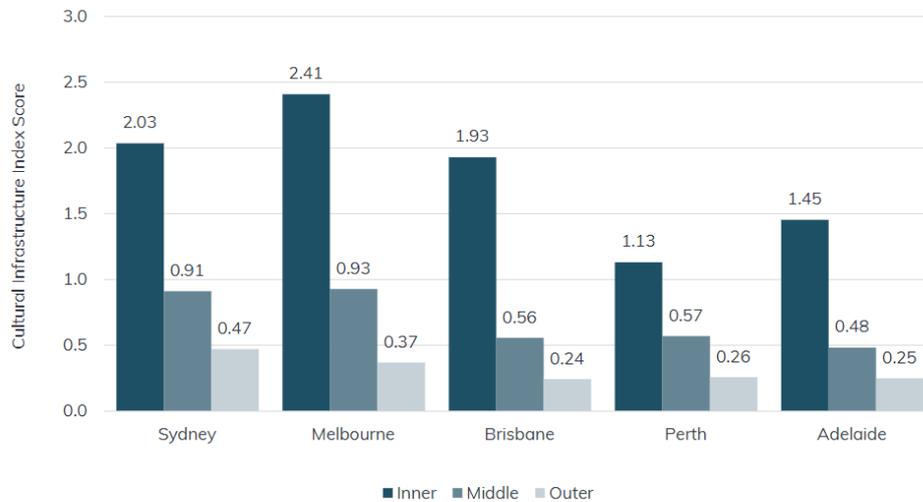
AUO measures access to cultural and leisure infrastructure based on dwelling proximity to:

- a museum or art gallery (3.2 km)
- a cinema or theatre (3.2 km)
- a library (1 km).

In 2021, access to cultural and leisure infrastructure was greatest in Sydney and Melbourne:

- Sydney had the highest index score at 0.91.
- Inner-city dwellings had access to the largest variety of culture and leisure infrastructure access, while outer-city ring areas had access to less than one infrastructure type on average (Figure 27).
- Newcastle–Maitland (0.66), Toowoomba (0.63) and Albury–Wodonga (0.63) had the highest levels of access among the non-capital cities.
- The majority of non-capital cities had higher levels of access than the capital’s outer-city ring areas, but most had lower access than the middle-city ring areas.

Figure 27: Access to cultural and leisure infrastructure by BCARR city rings, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts (27 May 2024). BCARR Analysis of Australian Urban Observatory Data and Australian Bureau of Statistics, Census of Population and Housing 2021 Data [Data Set].

The COVID-19 pandemic significantly impacted cultural event attendance. National average attendance for people aged 15 and over dropped from 82.4% (2017–18) to 63.8% (2021–22). This substantial decrease reflects the widespread restrictions on in-person social interactions during the COVID-19 pandemic.

Melbourne (–24 percentage point decline), Sydney (–22 percentage point decline) and Canberra (–21 percentage point decline) had the most pronounced declines among capital cities. There were declines of over 20 percentage points in regional Victorian cities. However, more than half of non-capital cities had higher cultural event attendance than Sydney and Melbourne in 2021.

Despite reduced attendance, cultural participation remained resilient, with national participation rates holding steady at 31.4% (2017–18) to 32.2% (2021–22). Cultural participation includes activities like singing, playing a musical instrument and craft activities, which were less likely to be affected by the COVID-19 restrictions. Some cities saw notable increases in participation, including:

- Wollongong, 11.9 percentage point increase
- Albury–Wodonga (Victorian part), 10.6 percentage point increase
- Darwin, 5.5 percentage point increase
- Brisbane, 3.3 percentage point increase
- Adelaide, 2.7 percentage point increase.

Arts

Adelaide Fringe Festival boosts culture and economy

The Adelaide Fringe Festival, Australia’s largest and the world’s second-largest fringe festival, demonstrates how cultural events can significantly impact both community engagement and economic development. In 2024, the 64-year-old festival generated \$121 million for South Australia, created 13,553 jobs and achieved \$27 million in box office sales across 306,318 visitor nights.⁹² The festival’s reach extends throughout South Australia, with one in every 2 South Australians attending the event, delivering benefits across tourism, retail and hospitality sectors from Whyalla to Mount Gambier.^{93, 94}

The festival’s success is built on its:

- innovative open-access platform that welcomes all artists and events, promoting diversity and inclusivity⁹⁵

- dedicated accessibility initiatives, including an Access Booking Line and commitment to accommodating visitors of all abilities⁹⁶
- an Annual Peace Foundation Award that recognises artists who promote human rights, social justice and environmental sustainability⁹⁷
- Adelaide Fringe Fund grants to support bold ideas, diverse voices and innovation in the arts⁹⁸
- the Fringe it LIVE Grants program, which allocated \$50,000 to support small to medium independent live music venues in 2024.⁹⁹

This commitment to accessibility was recognised with an Excellence in Accessible Tourism at the 2023 Australian Tourism Awards.¹⁰⁰

Strategic partnerships and sustainable funding models underpin the festival’s long-term success. The Adelaide Fringe Fund, supported by the Government of South Australia and private donors, has distributed over 500 grants since 2015, supporting artists, venues and producers.¹⁰¹ This approach ensures financial barriers are reduced for participants, ensuring diverse artistic voices are represented.

Sport

The importance of sport to urban culture is reflected in the level of engagement in sports—in 2022, 41% of Australians aged 15 and above participated in a sport-related activity at least once a week and 47% of children aged 0–14 participated in organised outside-of-school hours sport-related activity at least once a week.¹⁰²

Sport is also valued by Australians for promoting health and social cohesion:

- 97% of Australians acknowledge its positive impact on health and wellbeing
- 88% view it as a community unifier.¹⁰³

As Australia prepares for the 2032 Brisbane Olympics, investments across the sports ecosystem are opening up participation opportunities for diverse groups, including women, youth and people with disability.¹⁰⁴

Community and sport infrastructure

AUO measures access to community and sport infrastructure based on dwelling proximity to:

- community centres (1 km)
- public swimming pools (1.2 km)
- sports facilities (1 km).

In 2021, Melbourne, Sydney and Brisbane had the greatest access to sport and community infrastructure, with inner-city ring areas significantly outperforming outer-city ring areas. Inner-city dwellings had access to the largest variety of community and sport infrastructure, while outer-city ring dwellings had access to less than 0.3 infrastructure types on average.

For non-capital cities, in 2021 Wollongong had the highest access, followed by Bendigo and Albury–Wodonga, which had higher levels than larger cities like Gold Coast–Tweed Heads and Geelong. The majority of non-capital cities have higher levels of access than the capital’s outer-city ring dwellings.

Active urban lifestyles can offset Australia’s growing public health costs burden and reduce the incidence of early mortality. It is estimated that participation in physical activity saved the health system \$1.7 billion in 2018–19.¹⁰⁵

Culture and sport

The creative sector is recognised as a key resource that contributes to Australia’s economy.¹⁰⁶ In 2021, the cultural and creative industries employed approximately 712,000 people, representing 5.9% of total national employment. Cultural and creative activity contributed \$122.3 billion to the Australian economy in 2019–20, which represents 6.2% of the country’s GDP.¹⁰⁷ Notably, the sector is heavily concentrated in cities, with

80.7% of cultural sector employees based in capital cities. Sydney in particular stands out, with 8.6% of its employed residents working in cultural and creative industries.

The arts play an important role in education, with 63% of Australians recognising their importance in child development.¹⁰⁸ Additionally, 47% believe the arts build creative skills necessary for the future workforce.¹⁰⁹

The Australian sport and active recreation sector contributes to economic output and employment. In the 2016–17 financial year, this sector generated approximately \$14.4 billion, equivalent to 0.8% of Australia’s GDP.¹¹⁰ It supported around 128,000 full-time equivalent jobs, accounting for 1.5% of total Australian employment.¹¹¹ The sector’s impact extends beyond direct economic contributions, delivering an estimated \$83 billion annually in combined economic, health and educational benefits to Australian communities.¹¹²

The sports-tech sector—which focuses on technology used to improve athletic performance, training and analysis—has experienced rapid growth. In the year leading up to 2024 in this sector there were increases in both revenue and employment exceeding 10%, reaching an annual revenue of \$4.69 billion.¹¹³

FIFA Women’s World Cup 2023 transforms Australian cities

The FIFA Women’s World Cup 2023, co-hosted by Australia and New Zealand, delivered substantial economic and infrastructure benefits across 5 Australian cities. The tournament featured 35 matches that attracted 1,288,175 spectators, generated \$1.32 billion for Australia.¹¹⁴

The tournament enhanced urban liveability in host cities Sydney, Melbourne, Brisbane, Perth and Adelaide by providing world-class sporting infrastructure and fostering a sense of community pride. This demonstrates how cities can use public spaces to foster inclusivity and celebration around sporting events.¹¹⁵ In Sydney at Stadium Australia, a new benchmark for women’s sport attendance was set—the venue hosted the largest crowd for a women’s football match in Australia, with 75,784 fans.¹¹⁶

The event catalysed significant infrastructure improvements^{117,118} across host cities:

- Melbourne’s Federation Square emerged as a community hub, drawing over 140,000 people to live sites throughout the tournament.
- Brisbane’s Suncorp Stadium was upgraded to meet FIFA standards, so the city’s capacity to host future international events was improved.
- The enhancements to Perth’s HBF Park sporting infrastructure benefits local teams and communities beyond the tournament.
- Adelaide’s Hindmarsh Stadium improvements included upgraded change rooms and media facilities.

The tournament’s success was reinforced by strategic partnerships between cities, states and the Australian Government. For example, the events inspired the Australian Government’s \$200 million Play Our Way grant program to improve sporting facilities for women and girls across cities and regions. This approach ensures the benefits of hosting the World Cup extend beyond the event itself, creating lasting positive impacts on Australian cities and communities.¹¹⁹

Transport

The COVID-19 pandemic had a significant impact on the ways we move around cities. Census data on modes of transport for 2021 reflected the high number of Australians working from home or under lockdown at the time. As a result of these restrictions, all modes of transport except work from home show a decrease for 2021, with public transport usage decreasing substantially in capital and non-capital cities. Therefore, 2016 Census data has been used for this section of the report.

Private vehicles

Australia has a longstanding reliance on private vehicles for commuting. Since at least 1976, Census data has shown the majority of Australians travel to work as drivers of private vehicles.¹²⁰ This pattern persists today, although there are notable variations between capital and non-capital cities, as well as between inner-city ring areas and outer-city ring area. As of 2016, capital cities generally had a lower proportion of private vehicle use for journey-to-work commuting compared to non-capital cities. Sydney had the lowest rate among capital cities, with 64.1% of commutes made with private vehicles. In contrast, non-capital cities showed significantly higher rates:

- Albury–Wodonga, 90%
- Toowoomba, 89.6%
- Townsville, 89.4%.

As Australia's major cities continue to grow and expand outward, commute times and distances have generally increased for those attending physical workplaces. However, this trend is not uniform across all cities.

Most capital cities saw increased average journey-to-work commute distances between 2016 and 2021:

- The exceptions were Sydney (-2%) and Darwin (-5%), with slight decreases.
- Perth had the largest increase (7%), making it the capital city with the highest average commute distance at 16.9 km.
- The private vehicle mode share was highest in outer-city ring areas. For example, 86.0% of employed residents in Adelaide's outer-city ring areas commuted to work by private vehicle in 2016.

In non-capital cities:

- There was greater variance, with a roughly even split between cities increasing and decreasing journey-to-work commute distances.
- Townsville had the highest increase, up 6% to 10.9 km.
- Wollongong had the greatest decrease, down 8% to an average of 20.8 km.

Across the 20 cities, work travel distances in 2021 ranged from 10.8 km (Albury–Wodonga and Cairns) to 20.8 km (Wollongong).

Commute times in the 5 largest capital cities decreased between 2019 and 2020, largely due to the COVID-19 pandemic and associated lockdowns. This was a temporary effect and may not reflect long-term trends.

Public transport

Public transport use is generally low compared to car use, especially in non-capital cities. In 2016, Sydney had the highest proportion of public transport use at 25.3%, with all other capitals below 18%. Among non-capital cities, Wollongong (7.3%) and Geelong (6.3%) had the highest proportions, likely due to their proximity to larger capital cities. The public transport mode share was highest in the inner-city ring areas of capital cities in 2016.

Active transport levels are relatively low across the major cities. Based on journey-to-work data, use of active transport (walking and cycling) did not exceed 8% in any capital city. Canberra recorded the highest active transport mode share at 7.9%. Among non-capital cities, Launceston (6.1% for 2016 and 5.1% for 2021) and Cairns (5.8% for 2016 and 4.3% for 2021) had the highest proportions.

Walking was the most popular form of active transport. In 2016, 77.4% of active transport users in Australia opted to walk, compared to 22.5% opting to cycle. Journey-to-work walking tended to increase in most of the major cities. However, between 2016 and 2021 there was a decrease in cycling in most cities.

The active transport mode share was also highest in the inner-city ring areas of the 5 largest capital cities. For example, in 2016, 19.9% of employed residents in Melbourne's inner-city ring area used this mode to commute to work.

Commuting

The commuting burden, comprising time, financial and social costs, can significantly impact urban labour markets' productivity.^{121,122} This burden particularly impacts workers in outer-city ring areas, who often face longer travel distances and increased road congestion.

Between 2002 and 2017, the share of workers commuting two or more hours a day increased from 12% to 18%.¹²³

The commuting burden is influenced in part by the spatial distribution of transport networks, housing stock and urban amenities.¹²⁴ Key affected groups include:

- low-income renters
- workers living in outer suburbs, who face longer commutes and additional costs from tolls and parking
- key workers (teachers, nurses, community support workers, ambulance and emergency officers, delivery personnel and cleaners), who are more likely to reside in outer-city ring areas and commute more than 30 km to work
- people with disabilities, who are unintentionally excluded from full participation in built environments and transport systems.^{125,126}

Road congestion

Low-density suburbia, found in middle- and outer-city ring areas of Australian cities, rarely has sufficient public transport connectivity. This leads to high levels of private vehicle use, creating road congestion. In 2016, this congestion, coupled with public transport crowding, cost the Australian economy \$19.0 billion.¹²⁷ By 2040, capital city road freight is predicted to increase by 52.5% over 2020 levels, which will put further pressure on freight networks.¹²⁸

Remote working

The COVID-19 pandemic changed commuting behaviours and patterns within cities.¹²⁹ The adoption of remote work (RW) and working from home (WFH) arrangements has changed how Australians access work, education, training and health care.¹³⁰

People were considered to have WFH capability if they could perform their job remotely on some days of the week and if appropriate company policies were in place:

- WFH capability was higher for capital cities (56%) than for non-capital cities (45%).
- WFH capability was higher for the cities with a population of over 250,000 (55%) than for the small cities with a population of under 250,000 (41%).¹³¹

WFH capability varies across the five largest cities in 2021:

- Sydney, 63%
- Melbourne and Adelaide, 54%
- Perth and Brisbane 48%.¹³²

In the five largest capital cities, WFH capability shows clear spatial patterns:

- inner-city ring areas, 71%
- middle-city ring areas, 58%
- outer-city ring areas, 48%.

RW and WFH adoption is highest for workers in the knowledge and professional services economy,¹³³ with an estimated 68% of Australians professional workers accessing internet for home-based work in 2021.¹³⁴

Currently, RW and WFH access is not equally shared. Place-based and mobile roles continue to require physical attendance or commuting.¹³⁵ Industries with limited RW and WFG feasibility include:

- labour and trades

- freight, transport and logistics
- scientific and technical laboratories
- primary care and social assistance
- hospitality, arts and cultural services roles.

After the COVID-19 pandemic, continued RW and WFH arrangements have been supported by technology enabling working from home.¹³⁶ As of August 2023, 37% of Australians WFH regularly, 5 percentage points above the pre-pandemic level, but down from around 40% 2021.¹³⁷

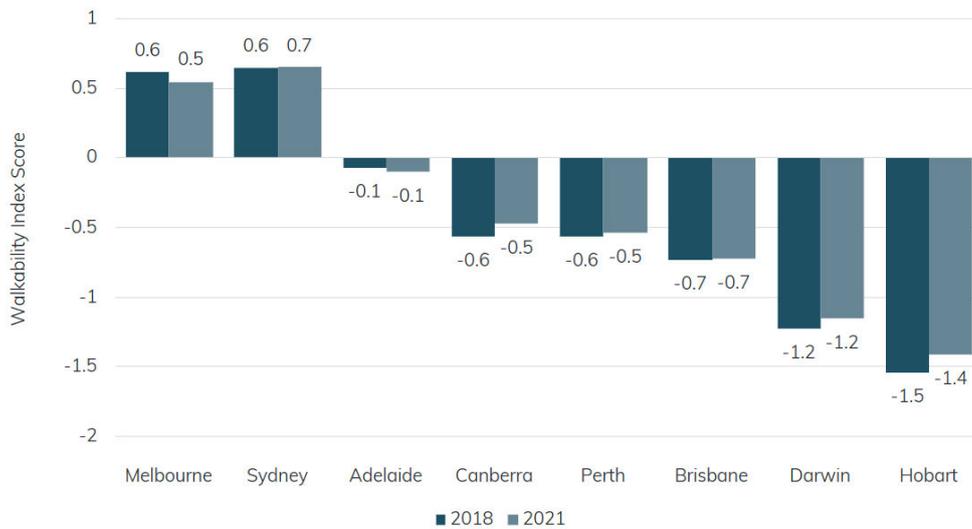
Walkability

AUO measures walkability for transport based on:

- land use mix and services of daily living (something to walk to)
- street connectivity (a way to get there)
- dwelling density (higher population densities are associated with increased populations needed to supply services and different land uses).

Walkability levels are generally low across Australian cities, with some exceptions in the inner-city ring areas of capital cities. Sydney and Melbourne were the only cities to have above-average levels of walkability, with Melbourne’s inner-city ring area having the highest level (Figure 28). The outer-city ring areas of capital cities all have lower levels of walkability than average. All of the non-capital cities have below average walkability.

Figure 28: Walkability index, capital cities, 2018 and 2021

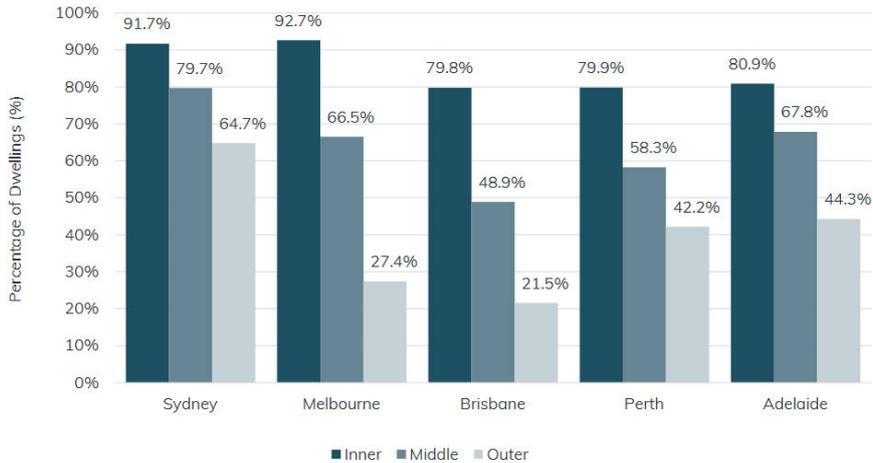


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (5 August 2024). Customised Report on Access to Services [Data Set].

Most places with low walkability also have low levels of public transport, making them car dependent. Public transport access is highest in the inner-city ring areas of capital cities, with more than 80% of dwellings having access to a regular service (Figure 29). However, access in outer-city ring areas is relatively low, ranging from 21% in Brisbane to 64% in Sydney.

Note: Melbourne’s 2021 access to regular public transport was affected by COVID-19-related reductions in public transport frequency (rather than reductions in public transport stops).

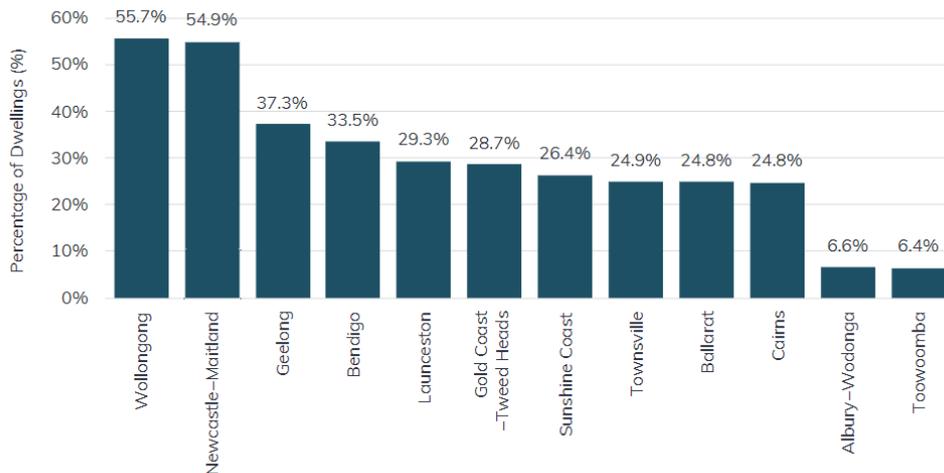
Figure 29: Proportion of dwellings that are within 400 m of a regular public transport service, capital city rings, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (1 October 2024). Customised Report on Access to Services [Data Set].

In 2021, only Wollongong and Newcastle–Maitland had public transport access equivalent to the capital cities (Figure 30).¹³⁸

Figure 30: Proportion of dwellings that are within 400 m of a regular public transport service, non-capital cities, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (5 August 2024). Customised Report on Access to Services [Data Set].

Hobart’s cycling focus supports urban mobility

The Greater Hobart Cycling Plan represents a comprehensive approach to transforming urban mobility through enhanced cycling infrastructure.¹³⁹ With cycling currently accounting for just 2% of weekday commutes, the plan targets significant mode-shift potential, as research indicates that moving just 4% of commuters to alternative transport modes could significantly decrease congestion.¹⁴⁰ The initiative focuses on creating an interconnected network of cycling infrastructure across Greater Hobart, designed to accommodate all ages and abilities (AAA) and through various modes, including:

- riding a bike, scooter or e-scooter, trike or cargo bike
- using a wheelchair, pram, skateboard or rollerblades.¹⁴¹

The plan's infrastructure specifications, aligned with the Tasmanian Cycling Infrastructure Design Guide, establish clear technical standards for implementation. The plan aims to:

- implement off-road paths, typically shared with pedestrians, that are a minimum of 3 m wide
- protect bicycle lanes with physical barrier separation from motor vehicles
- create local street bikeways with low vehicle volumes and speeds not exceeding 30 km/h.¹⁴²

The plan emerges from a strategic partnership between the Tasmanian Government, multiple councils (Hobart, Glenorchy, Clarence and Kingborough) and the Australian Government as part of the Hobart City Deal and Greater Hobart Transport Vision.¹⁴³ The broader vision aims to establish 'a reliable, sustainable and cost-effective transport system with a focus on active and public transport', with a specific focus on replacing short to medium-length car trips with more sustainable alternatives to address traffic congestion.¹⁴⁴

Public safety

Australian cities maintain high standards of public safety, enhancing their liveability and global reputation. Sydney and Melbourne rank in the top 10 of the Economist Intelligence Unit's Safe Cities Index 2021.¹⁴⁵

Between 2021 and 2022, 94% of men and 85% of women felt safe walking alone in their local area after dark.¹⁴⁶

In 2022–23, an estimated 4.0% of people aged 15 and over experienced a crime:

- physical assault, 1.7%
- face-to-face threatened assault, 2.2%
- non-face-to-face threatened assault, 0.7%
- robbery, 0.2%
- sexual assault, 0.5%.¹⁴⁷

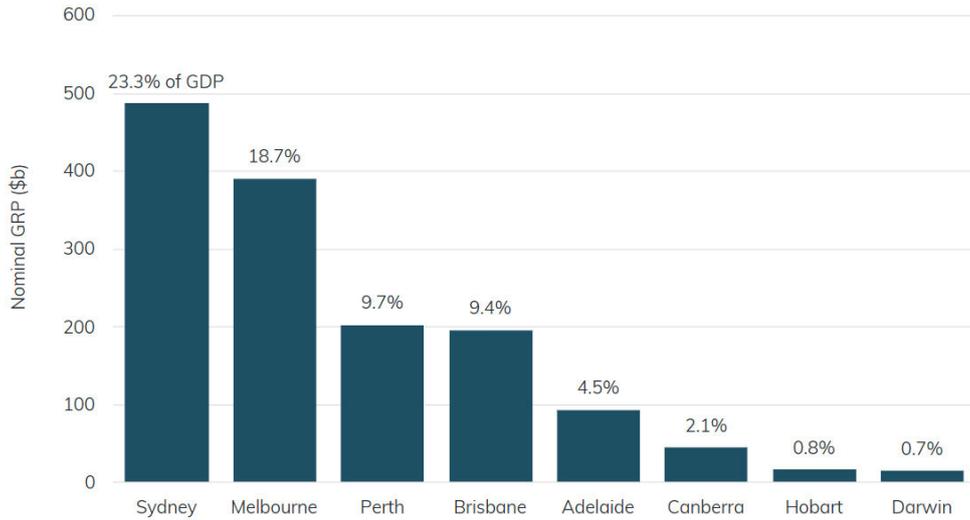
Productive and innovative

Economy

Australian GDP was \$2,561 billion in 2022–23, with an average annual growth rate of 2.2% over the 5 years to 2022–23.

Australia’s major cities contributed 77.8% of GDP in 2020–21. During this time, the 8 capital cities contributed 69.2% of GDP, measured by their Gross Regional Product (GRP) (Figure 31).

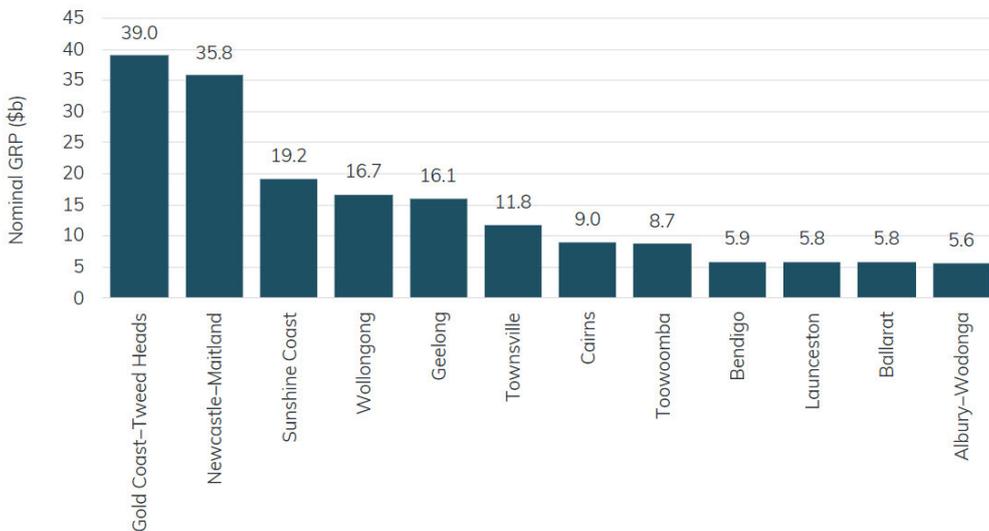
Figure 31: Gross Regional Product by capital cities, 2020–21



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (18 April 2024). Customised Report on Gross Regional Product in 20 Largest Australian Cities, 2020–21 [Data Set].

Non-capital cities were led by Gold Coast–Tweed Heads, with a GRP of \$39 billion, and Newcastle–Maitland, with \$36 billion (Figure 32).

Figure 32: Gross Regional Product by non-capital cities, 2020–21



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (18 April 2024). Customised Report on Gross Regional Product in 20 Largest Australian Cities, 2020–21 [Data Set].

Real values, such as real GRP, are adjusted to take out the effects of price movements from the estimates, making values for different years comparable. Across Australia's major cities, growth in real GRP from 2015–16 to 2020–21 was highest per annum for:

- Sunshine Coast, 3.9%
- Canberra, 3.8%
- Geelong, 3.8%.

Darwin's real GRP declined by an average of –1.3% per annum from 2015–16 to 2020–21. This downturn can in part be attributed to the building construction and heavy and civil engineering industries, such as the completion of the Ichthys LNG project. This fall was somewhat softened by the increase in activity in the oil and gas extraction industry and some service industries.¹⁴⁸

Gross Value Added (GVA) is also an important metric. Each industry's contribution to the economy can be analysed by its GVA.¹⁴⁹ GVA measures do not currently exist for cities but are important in setting the context for how industries contribute to the fabric of Australia's wider economy. Cities tend to have highly concentrated healthcare and professional industries. As of 2022–23, the mining industry accounted for the largest share (14.3%) of Australian GVA. This was followed by:

- ownership of dwellings,^v 8.6%
- Health Care and Social Assistance, 8.0%
- Professional, Scientific and Technical Services, 7.6%.

Manufacturing was the only industry that saw a decline in GVA in real terms in the 5 years to 2022–23.

The industries that showed the fastest average annual growth in GVA over the 5 years to 2022–23 were:

- Information, Media and Telecommunications, 6.2%
- Health Care and Social Assistance, 5.7%
- Professional, Scientific and Technical Services, 4.6%.¹⁵⁰

Employment and skills

Employment growth

Australia's cities continue to attract the majority of employment opportunities and job creation. Between March 2021 and March 2024, the employment growth rate for Australia was 3.9%. In capital cities, the highest average annual employment growth rates were in Perth (Figure 33).

Despite this growth, Australia has been experiencing skills shortages.¹⁵¹ This has been hampering the economy, with more than a quarter of all Australian businesses struggling to find suitable workers to fill roles in 2021.¹⁵²

In March 2024, the capital cities accounted for 68.9% of employed residents. This has varied little since March 2021.

^v This 'industry' consists of landlords and owner-occupiers of dwellings. It is valued based on rents paid to landlords and imputed rents for owner-occupied dwellings. [BCARR] Bureau of Infrastructure and Transport Research Economics. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (19 June 2024). Experimental Gross Regional Product estimates.

Figure 33: Employment growth rate in capital cities, March 2021 to March 2024



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (20 June 2024). Customised Report on Labour Force [Data Set].

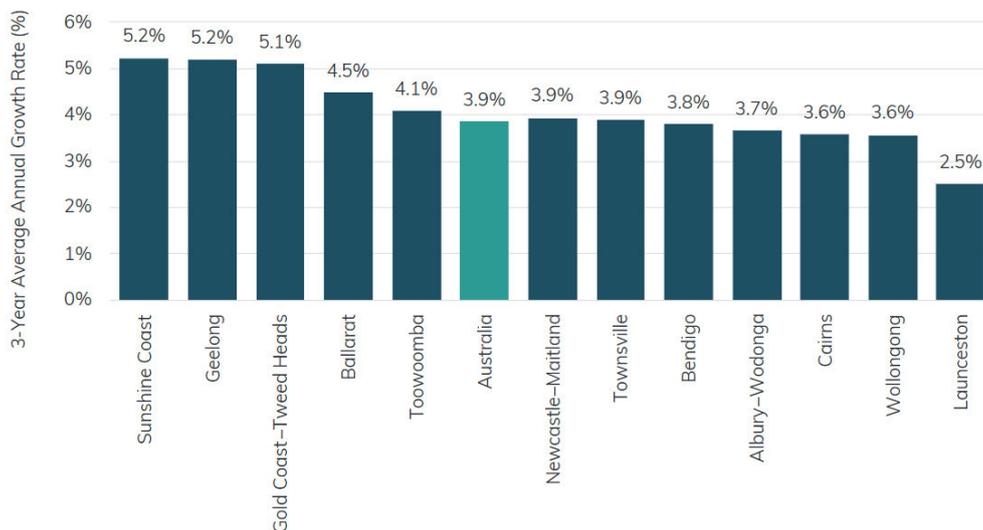
In non-capital cities, the highest average annual employment growth rates were in (Figure 34):

- Sunshine Coast, 5.2%
- Geelong, 5.2%
- Gold Coast–Tweed Heads, 5.1%

These cities outperformed all of the capital cities.

In March 2024, the number of employed residents in non-capital cities accounted for 12% of the total for Australia. The 3-year average annual employment growth rate for the combined non-capital cities was 4.4%. This is above the combined rate for the capital cities and the rate for Australia (3.9%).

Figure 34: Employment growth rate in non-capital cities, March 2021 to March 2024



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts (20 June 2024). Customised Report on Labour Force [Data Set].

First Nations employment

Closing the Gap Target 8 aims to increase First Nations employment (ages 25-64) to 62% by 2031.¹⁵³ Employment represents a pathway to enhanced social and personal wellbeing, serving as a powerful mechanism for self-determination and holistic community advancement by creating opportunities for economic independence, skills development and broader social participation. Between 2016 and 2021, all

capital cities saw an increase in the proportion of employed First Nations people aged 25 to 64. In 2021, employment rates for First Nations people was 55.7% and the national rate was 77%.

The highest proportions of First Nations persons employed were in:

- Canberra, 73.1%
- Sunshine Coast, 70%
- Gold Coast–Tweed Heads, 69%.

Some cities fell below the national average (55.7%) of First Nations people who were employed:

- Perth, 55.2%
- Adelaide, 55.1%
- Townsville, 54.4%.¹⁵⁴

Employment data comes from 2 sources:

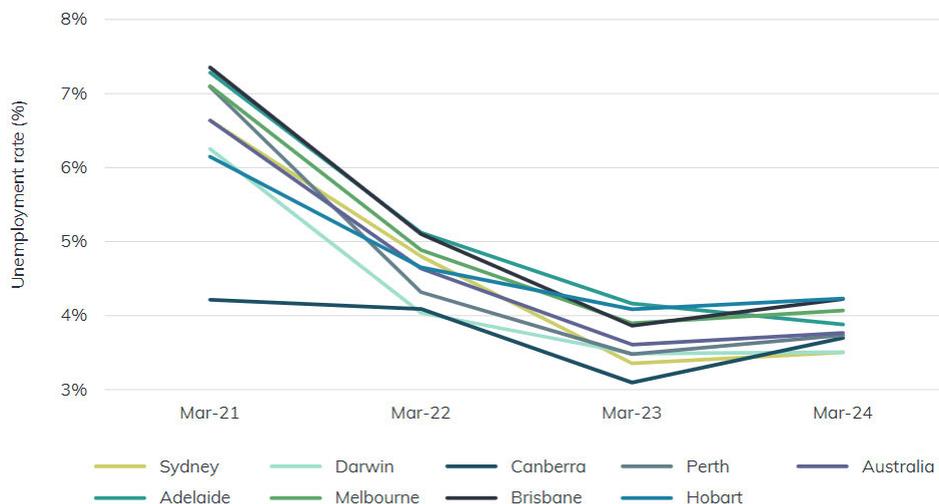
- First Nations employment, derived from 2021 Census
- total employment, from the Australian Bureau of Statistics (ABS) Labour Force survey.

Unemployment

The national unemployment rate for the 12 months ended March 2024 was 3.8%, up from 3.6% in March 2023. In the 12 months to March 2024, Sydney and Darwin had the lowest unemployment rates (3.5% each), followed by Canberra (3.7%). Melbourne, Brisbane and Hobart had the highest unemployment rates (4.1% for Melbourne and 4.2% each for Brisbane and Hobart).

Most cities experienced a sharp decline in the unemployment rate from March 2021, due to the gradual relaxation of COVID-19 restrictions (Figure 35). There was a slight rise in the rate for most cities between March 2023 and March 2024. The exceptions were Darwin, where the rate stayed the same (3.5%), and Adelaide, where there was a slight decrease (from 4.2% to 3.9%).

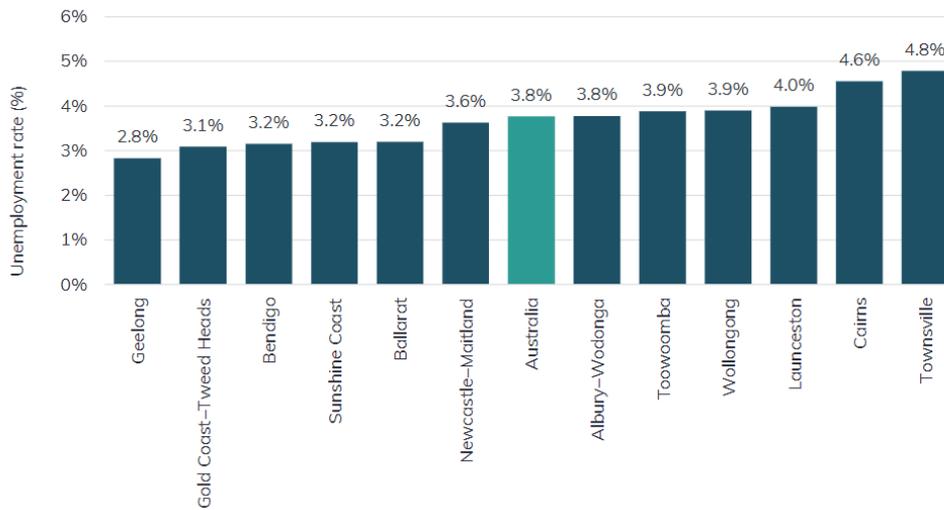
Figure 35: Unemployment rate in capital cities, March 2021 to March 2024



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (20 June 2024). Customised Report on Labour Force [Data Set].

In the 12 months to March 2024, Geelong had the lowest unemployment rate, while Cairns and Townsville had the highest rates (Figure 36). Half of non-capital cities had an unemployment rate lower than the rate for Australia (3.8%).

Figure 36: Unemployment rate in non-capital cities, March 2024

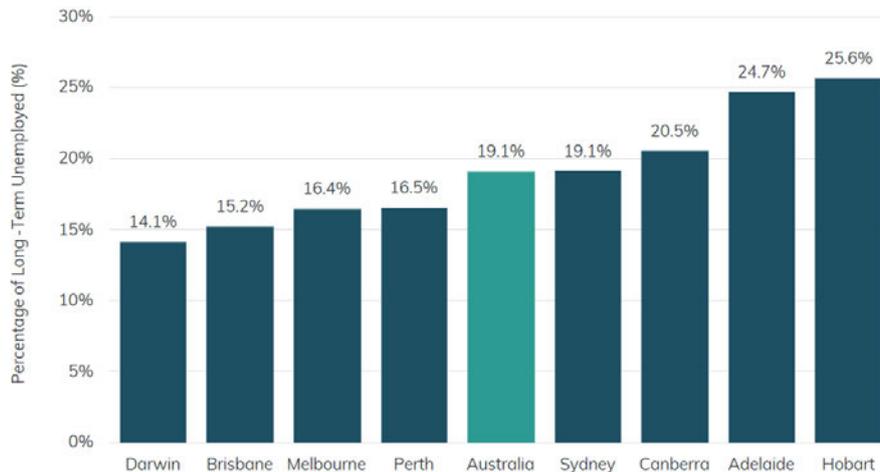


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (20 June 2024). Customised Report on Labour Force [Data Set].

Long-term unemployment

A person is in ‘long-term unemployment’ if they do not have paid work and/or have been looking for work for a year or more.¹⁵⁵ The rate of long-term unemployed people in capital cities in March 2024 was 19.1% (Figure 37). Within that 19.1%, the cities with the lowest proportion of people looking for work for 12 months or more was in Darwin, and the highest was in Hobart.

Figure 37: Proportion of long-term unemployed as a percentage of total unemployed in capital cities, March 2024



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (20 June 2024). Customised Report on Labour Force [Data Set].

In most cities the proportion of long-term unemployed declined after March 2022. This reflects the trend in the post-COVID-19 unemployment rate that saw a decline after March 2021, with a 12-month delay.

The exception is Hobart, where there has been a steady increase in the proportion of long-term unemployed up to March 2023, followed by a decrease to March 2024.

Working age population

Nationally in 2022, the proportion of people aged 15 to 64 was 64.6%. The proportion was highest in Darwin (69.8%) and lowest in Sunshine Coast (60.6%).

Sunshine Coast had the highest 5-year average annual growth rate for the 15 to 64 year age group (2.2%) and Darwin had the lowest (-0.5%). The 5-year average annual growth rate for Australia was 0.8%.

The proportion of people aged 15 to 64 was highest in the inner-city ring areas and lowest in the outer-city ring areas of all major capital cities. The 5-year average annual growth rate for the 15 to 64 year age group was highest in the outer-city ring areas of Melbourne, Perth and Sydney. However, Brisbane’s inner-city ring area and in Adelaide’s middle-city ring area were highest.

The proportion of young people (aged 15–24) fully engaged in employment, education or training was highest in Canberra (84%), Melbourne (81%) and Perth (78%). Brisbane (76%), Darwin (75%) and Hobart (73%) fell below the national rate (77%).

Across the 5 largest capital cities, rates of earning or learning were highest in inner-city ring areas and lowest in outer-city ring areas for all cities, except for Melbourne, where the rate was highest in the middle-city ring areas. Perth’s inner-city ring area had the highest rate (85%) and Brisbane’s outer-city ring area had the lowest (70%).

Of the non-capital cities, Geelong (77%) had the highest proportion of young people earning or learning. All other non-capital cities fell below the national rate (77%).

Labour force underutilisation

Underutilisation measures aim to measure the degree to which total labour force resources in a particular area are being fully used in the economy.¹⁵⁶ Labour force underutilisation was 9.9% in Australia in 2023. Four capital cities had higher underutilisation rates than the national average, with Hobart having the highest in 2023 (Figure 38).

Underutilisation rates across the capital cities saw a marked incline in 2020 due to the COVID-19 pandemic before dropping in 2021 and 2022. Underutilisation rates have remained stable in most of the capital cities between 2022 and 2023. This follows a general trend in Australia where the labour market has been more fully utilised in the period after the COVID-19 pandemic.

Figure 38: Labour force underutilisation rate in capital cities, 2019 to 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (2024). Progress in Australian Regions and Cities Dashboard, based on customised data supplied by [ABS] Australian Bureau of Statistics for 2023. <https://www.infrastructure.gov.au/department/media/news/2021-progress-australian-regions-and-cities-dashboard>, accessed 16 May 2024.

Industries in cities contributing to Australia’s economy

Australian cities are home to diverse and growing industries. In 2021, Health Care and Social Assistance was the largest employing industry in Australia, with 15.3% of total employed residents across Australia’s major cities.

This industry added 400,699 jobs nationwide between 2016 and 2021, representing an annual growth rate of 5.3%. The next largest growing industries in Australia were:

- Professional, Scientific and Technical Services, 169,166
- Construction, 156,587
- Education and Training, 135,430.

These were also typically in the top three employing industries in most of Australia’s major cities. Information Media and Telecommunications was the only industry that declined over the same period—it decreased by 12,647 employed persons (1.5% annually).

Health and Social Assistance

Australia’s ageing population has driven an increase in demand for Health Care and Social Assistance workers (Table 5), with the industry showing 72% growth in the ‘aged and disabled carers’ job category between 2016 and 2021.¹⁵⁷ Health Care and Social Assistance is also the largest employing industry in each of the non-capital cities, ranging from 20.5% of employed persons in Toowoomba to 16.1% in Gold Coast–Tweed Heads.

Table 5: Top 3 employing industries in Australia’s capital cities, 2021

City	Top 3 industries	Employed residents (%)
Sydney	Health Care and Social Assistance	14.1%
	Professional, Scientific and Technical Services	11.5%
	Retail Trade	9.3%
Melbourne	Health Care and Social Assistance	14.2%
	Professional, Scientific and Technical Services	10.1%
	Retail Trade	9.8%
Brisbane	Health Care and Social Assistance	16.1%
	Education and Training	9.4%
	Retail Trade	9.4%
Adelaide	Health Care and Social Assistance	17.7%
	Retail Trade	10%
	Education and Training	9.3%
Perth	Health Care and Social Assistance	14.8%
	Retail Trade	9.3%
	Construction	9.3%
Canberra	Public Administration and Safety	30.4%
	Health Care and Social Assistance	11.7%
	Professional, Scientific and Technical Services	11.1%
Darwin	Public Administration and Safety	19.5%

	Health Care and Social Assistance	14.2%
	Construction	9.2%
Hobart	Health Care and Social Assistance	17.3%
	Education and Training	10.8%
	Public Administration and Safety	10.2%

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (12 June 2024). Customised Report on Industry [Data Set].

In the capital cities, ‘Information Technology’ as a broad category experienced the greatest growth as a field of study between 2011 and 2021, increasing by 73%.

‘Health’ experienced a 57% increase as a field of study. This reflects the predominance of Health Care and Social Assistance as the largest employing industry in Australia and most of the capital cities. This industry is expected to grow a further 22% by 2033.¹⁵⁸

Tourism

Australia’s tourism sector contributed \$63.0 billion (2.5%) to Australia’s GDP in 2022–23, and filled 634,400 tourism jobs in the June quarter 2024.¹⁵⁹ The tourism investment pipeline in capital cities reached \$56.1 billion in 2022–23, up from \$44.3 billion in 2021–22.¹⁶⁰

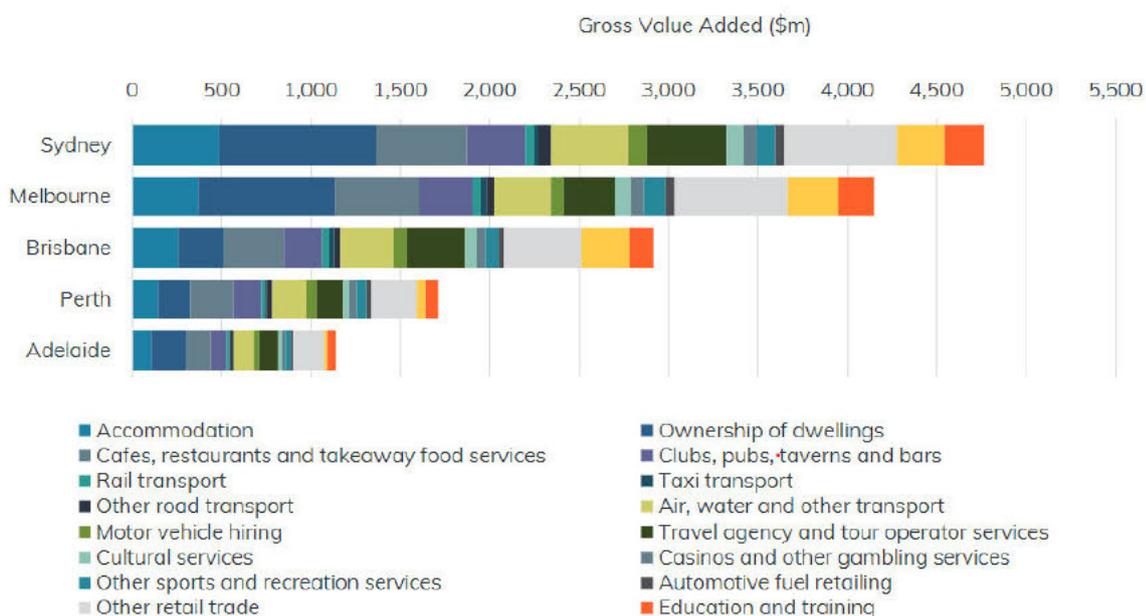
Tourism’s gross value added (GVA) in capital city regions declined significantly during COVID-19, with varying patterns of recovery through to 2021–22:

- Melbourne and Sydney experienced the largest decreases, falling to 26% and 34% of their pre-COVID levels respectively
- Brisbane declined to 40% of its pre-COVID level
- Hobart showed the strongest recovery, reaching 69% of its pre-COVID level by 2021–22
- Darwin followed a different pattern, with tourism GVA declining steadily from 2017–18 through 2021–22.

Two industry groups—Cafes, restaurants and takeaway food services, and Other retail trade—were among the top 3 contributors to tourism GVA across all major capital city tourism regions in 2021–22 (Figure 39).

By September 2023, domestic tourism spending in capital city regions had exceeded pre-COVID levels, though visitor numbers remained below 2019 levels.

Figure 39: Industry breakdown of GVA from tourism in selected capital city tourism regions, 2021–22



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (5 March 2024). Customised report on Tourism [Data Set].

Note: This analysis uses tourism regions, which typically cover larger geographical areas than city boundaries. For Sydney and Melbourne, multiple tourism regions have been combined to better align with Greater Capital City Statistical Areas (GCCSA). Four cities (Wollongong, Albury-Wodonga, Ballarat and Toowoomba) are excluded as their corresponding tourism regions do not adequately represent their city boundaries.

First Nations tourism

In 2022–23, First Nations tourism businesses employed nearly 7,000 workers and generated almost \$1 billion in turnover.¹⁶¹ First Nations goods exporters demonstrated significant economic potential, generating over \$670 million in turnover and typically outperforming other First Nations businesses by employing over seven times more full-time equivalent workers and producing nearly nine times more in turnover.¹⁶²

Knowledge based economy

Knowledge is recognised as central to economic development and a key driver of productivity and economic growth. The ‘knowledge-based economy’ is an economy that is ‘directly based on the production, distribution and use of knowledge and information’.¹⁶³

Australia’s knowledge-based economy is slowly growing. In February 2024, 14.5% of all employed people in Australia worked in the knowledge sector (Professional, Scientific and Technical Services, Financial and Insurance Services, or Information, Media and Telecommunications industries)—a 1.1% increase between February 2018 to February 2024.

Australia’s capital cities account for the majority of residents employed in the knowledge sector: In February 2024, the capital cities with a proportion of employed residents in the knowledge sector that exceeded the national average were:

- Sydney, 21.4%
- Melbourne, 18.4%
- Canberra, 16.4%
- Brisbane, 15.2%.

New industries

Nationally, demand for electricians, building and engineering trades will be high to meet the needs of the clean energy workforce and to meet Australia’s net zero target.¹⁶⁴ For example, the shift to renewable energy in Queensland is leading to the creation of 64,000 jobs in clean energy infrastructure and an additional 36,000 jobs in new industry development such as renewable hydrogen, battery manufacturing, mining and metal refining across towns and cities by 2040.¹⁶⁵

TAFE Queensland’s Clean Energy (Batteries) Centre of Excellence

The Australian and Queensland governments have jointly committed \$20 million over 5 years to establish a Clean Energy (Batteries) Centre of Excellence at TAFE Queensland.¹⁶⁶ The centre will develop and deliver training across the national TAFE network in:

- renewable energy batteries
- intermittent renewable energy source storage
- grid connectivity
- network embedded storage
- electric vehicles.¹⁶⁷

Training will be delivered through higher-level apprenticeship and degree pathways, including the Certificate III Electrotechnology Electrician and the Bachelor of Engineering/Electrical Science.¹⁶⁸

The centre will focus on upskilling workers in the design, installation, operation and maintenance of renewable energy systems and batteries. It forms part of the National Skills Agreement's \$325 million investment to establish up to 20 TAFE Centres of Excellence across Australia in areas of high skills need.¹⁶⁹

The initiative aligns with the Queensland Energy and Jobs Plan, which forecasts 100,000 energy sector jobs by 2040, including 36,000 positions in green growth areas such as:

- renewable hydrogen
- battery manufacturing
- resource mining
- metal refining.¹⁷⁰

The establishment of this centre of excellence demonstrates a strategic approach to addressing Australia's future workforce needs. By focusing on emerging technologies and fostering collaboration between education providers and industry, it aims to create a pipeline of skilled workers ready to support the growing clean energy sector.¹⁷¹

Innovation

Australian business innovation has shown resilience, with 45.7% of businesses engaging in innovative activities in 2022–23, marking the highest rate this decade (excluding the pandemic period).¹⁷² Business size continues to influence innovation rates, with 65% of businesses employing 20 or more employees engaging in innovative activities.¹⁷³

Process innovations (31% of businesses) outpaced the introduction of new goods and services (22% of businesses). Most innovation-active businesses (70%) reported some innovation expenditure, though 44% invested less than \$25,000.¹⁷⁴

Collaboration remains significant, with 33% of innovation-active businesses engaging in partnerships or fee-for-service arrangements. However, nearly half faced barriers to collaboration. Key challenges included lack of skilled personnel and financial constraints.¹⁷⁵

For large businesses (200+ employees), innovation outcomes included:

- 33% attributed between 5–50% of income to innovations
- 20% reported cost savings exceeding 10% from process innovations.

Environmental benefits were reported by approximately one-third of innovating businesses.¹⁷⁶

Canberra network empowers entrepreneurs and drives economic growth

Canberra Innovation Network (CBIN), launched in 2014, is an ACT Government initiative operating in partnership with:

- Australian National University
- University of Canberra
- CSIRO
- University of New South Wales.¹⁷⁷

CBIN's Economic Impact Report (October 2021) shows the network delivered:

- \$100 million has been added to ACT economy
- 400 innovation jobs have been created/supported
- \$52 in economic value has been created by every \$1 invested by the ACT Government

- 70% of people who have engaged with CBRIN consider it critical to their growth.¹⁷⁸

CBRIN has embraced innovation and collaboration in the context of a changing and diversifying economy. This approach has resulted in positive outcomes—for example:

- GPN Vaccines, an Australian start-up, raised \$18 million investment for research.¹⁷⁹
- Canberra-based innovation company Syenta is developing manufacturing equipment for metallisation, offering a reversible solution for recycling metals from solar cells.¹⁸⁰
- Startup of the Year 2021 winner, Aurabox, developed a patient-focused diagnostic platform so doctors can access full medical imaging history.¹⁸¹

CBRIN demonstrates how targeted support for innovation can deliver measurable economic outcomes while developing new solutions across healthcare, renewable energy and other sectors. The network's partnership model between government, universities and research organisations provides a framework for supporting entrepreneurship and innovation.¹⁸²

Education and skills

The demand for higher qualifications is increasing. Over the next decade, more than 9 out of 10 new jobs are expected to require post-secondary qualifications (Certificate III or higher).¹⁸³ Moreover, a significant proportion of new jobs created in the next 5 years will require tertiary qualifications, with the majority requiring university-level education—a trend that is likely to continue.¹⁸⁴

This section focuses on how education supports a skilled workforce. For more information about access to education, including child care, see the 'Liveable and equitable' chapter.

Secondary education

In 2021, 84% of all Australians aged 20 to 24 had completed year 12. Capital cities had a higher completion rate than non-capital cities. Canberra led with a 92% completion rate, followed by:

- Brisbane, 89%
- Melbourne, 88%
- Sydney, 87%.

Hobart (80%) and Darwin (79%) were the only 2 capital cities that were below the national rate of 84%. Across Australia's 5 largest capital cities, high school completion is highest in inner-city ring areas and lowest in outer-city ring areas.

Amongst non-capital cities, Gold Coast–Tweed Heads (87%) had the highest proportion of high school completion. Townsville (86%) and Sunshine Coast (85%) were the only other non-capital cities that were above the national rate.¹⁸⁵

Cities with the lowest proportion of persons who have completed high school were:

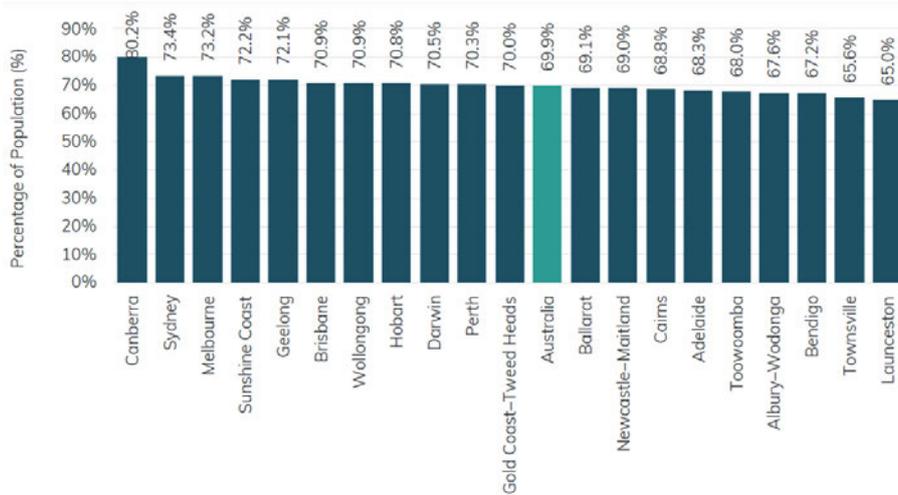
- Newcastle–Maitland, 74%
- Launceston, 73%
- Albury–Wodonga, 70%.

Tertiary education

Over the next 10 years, more than 9 out of 10 new jobs are expected to require post-secondary qualifications (Certificate III or higher).¹⁸⁶

As of 2021, 69.9% of Australians aged 25 to 64 held post-secondary qualifications, with the majority residing in the capital cities (Figure 40). Of all capital cities in 2021, Canberra had the highest proportion of residents in this age group with a Certificate III qualification or higher. Of the non-capital cities, Sunshine Coast had the highest proportion of people with Certificate III qualifications or higher.

Figure 40: Proportion of population aged 25–64 with Certificate III or higher in Australia’s major cities, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (14 June 2024). Customised Report on Education and Skills in Australian Cities 2021 [Data Set].

The national average for university-educated individuals aged 25 to 64 was 37% in 2021 (Figure 41).

The capital city with the highest concentration of university graduates is Canberra (56%). Within the largest 5 capital cities, inner-city ring areas typically show the highest concentrations of university graduates. For instance, people in Melbourne’s inner-city ring area had the highest number of university qualifications (67%), while people in Brisbane’s outer-city ring areas had the lowest (23%).

Figure 41: Proportion of persons aged 25–64 with a bachelor degree or higher in capital cities, 2021

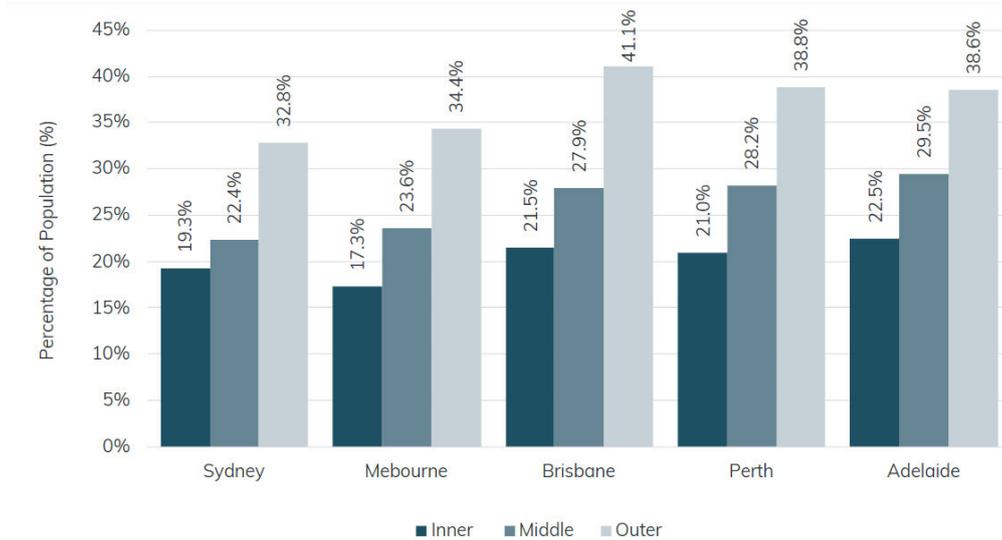


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (14 June 2024). Customised Report on Education and Skills in Australian Cities 2021 [Data Set].

All non-capital cities had a lower proportion of their population holding a university qualification than the national average. Geelong (36%) had the highest rate among the non-capital cities.

In capital cities, the geographic distribution of vocational qualifications (diplomas and certificates) often inversely mirrors that of university degrees. Darwin (35%), Brisbane (33%) and Perth (33.41%) exceeded the national average of 33% for vocational qualifications. Canberra had the lowest at 24%. Inner-city ring areas of the largest 5 capital cities had the lowest proportion of people with a diploma or certificate, while outer-city ring areas had the highest (Figure 42).

Figure 42: Proportion of persons aged 25–64 with a certificate or diploma in BCARR city rings, 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (14 June 2024). Customised Report on Education and Skills in Australian Cities 2021 [Data Set].

In non-capital cities, Albury–Wodonga (42%) and the Sunshine Coast (42%) had the highest percentage of persons aged 25 to 64 whose highest level of education is a certificate or diploma. All non-capital cities were above the national rate (33%).

UTAS Launceston campus relocation to boost education

The University of Tasmania’s (UTAS) \$260 million relocation of its Launceston campus from Newnham to Inveresk addresses educational challenges in northern Tasmania.¹⁸⁷ As part of the Launceston City Deal, this initiative responds to the region’s low tertiary education attainment, with just 20.6% of Launceston residents aged 21 to 64 holding a bachelor’s degree.¹⁸⁸

The new Inveresk campus development includes:

- advanced teaching and research facilities including the Launceston Institute for Applied Science and Design
- industry-aligned degrees and short courses
- integration with Launceston’s CBD
- innovation spaces supporting entrepreneurship and industry collaboration.¹⁸⁹

The project prioritises sustainability and community access through:

- repurposed industrial buildings reducing carbon impact
- connected green spaces linking campus
- city new pedestrian and cycling infrastructure public facilities.¹⁹⁰

Targeting 10,000 students by 2032, the development aims to boost regional productivity through increased higher education participation, enhanced research capability and stronger industry partnerships.¹⁹¹ The UTAS Inveresk campus demonstrates how strategic investment in regional education infrastructure can simultaneously address educational disadvantage and stimulate economic growth.

Education for First Nations people

Educational attainment among First Nations people is improving, with gains in post-secondary qualifications. In 2021, 47% of First Nations people aged 25 to 34 held a Certificate III or higher qualification, representing a notable increase from 42.3% in 2016.¹⁹² The employment rate of First Nations people has consistently shown an increase with higher levels of education.¹⁹³ This progress demonstrates the effectiveness of educational initiatives and First Nations leadership in advancing learning outcomes.

Capital cities show particularly strong achievement rates. Canberra leads with 64.9% of First Nations people holding post-secondary qualifications, followed by Melbourne (62.3%) and Sydney (57.6%) (Figure 43).

Figure 43: Proportion of First Nations people aged 25 to 34 with Certificate III or higher in capital cities, 2016 and 2021

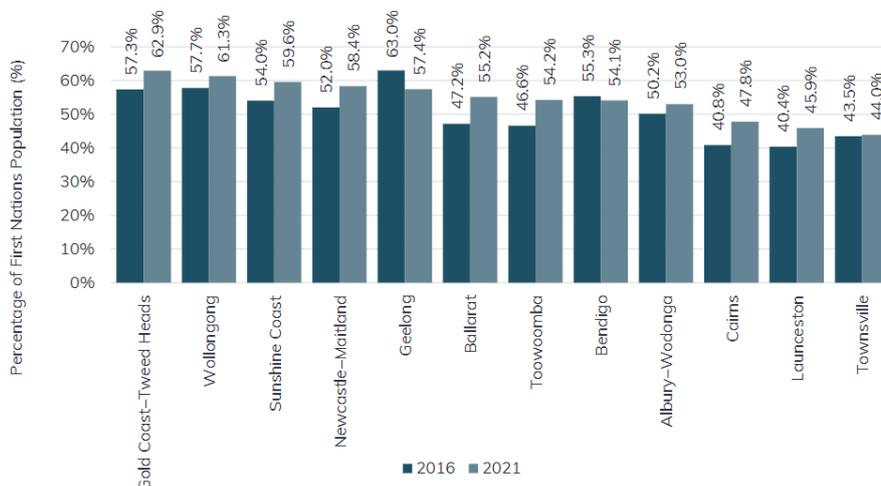


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (6 June 2024). Customised Report on First Nations Outcomes [Data Set].

Non-capital cities also demonstrate strong educational outcomes (Figure 44), particularly in:

- Gold Coast–Tweed Heads 62.9%
- Wollongong 61.3%
- Sunshine Coast 59.6%.

Figure 44: Proportion of First Nations people aged 25 to 34 with Certificate III or higher in non-capital cities, 2016 and 2021



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (6 June 2024). Customised Report on First Nations Outcomes [Data Set].

Employment precincts

Australian cities show clustering in highly concentrated employment precincts. Employment precincts are defined areas that concentrate more than 30,000 employed persons. As of 2021, Australia’s 5 largest cities contain 25 such precincts:

- 9 in Melbourne
- 8 in Sydney
- 4 in Brisbane
- 2 each in Perth and Adelaide.

There are 4 kinds of employment precinct:

1. central business district (CBD) precincts
2. health/education specialised precincts
3. industrial area precincts
4. transport/logistics hubs.

CBD employment precincts in the five largest capital cities are the dominant employment hub type with a much higher share of the city’s employment than any other precinct. CBDs typically have a high share of employment in Professional, Scientific and Technical Services, Finance and Insurance and/or Public Administration and Safety industries. Between 2016 and 2021, in the five largest cities, the total number of employed persons has grown, with the five capital city CBD precincts each capturing between 16% and 24% of the respective city’s total employment as at 2021.

Melbourne and Adelaide are the only two cities where the proportion of total city employment within the precinct slightly decreased between 2016 and 2021 (Table 6), indicating employment growth in other employment precincts outside of the CBD.

Table 6: CBD proportion of total city employment, 2016 and 2021

CBD share of employment	2016	2021
Harbour CBD (Sydney)	22.8	23.1
Melbourne Central City	17.5	17.4
Brisbane Capital City Centre	18.1	18.8
Perth Capital City	15.9	16.4
Adelaide Capital City	21.0	20.5

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (13 December 2023). Customised Report on Spatial Distribution of Jobs [Data Set].

Employment growth

Capital cities experienced employment growth between 2016 and 2021, which is reflected in some of those cities’ major employment precincts (Figures 45 to 48). Between 2016 and 2021, Melbourne’s CBD-based employment precinct gained the most employed persons, adding 55,881 workers. Sydney’s Harbour CBD precinct added 47,390 workers, while the Brisbane Capital City Centre precinct gained 36,047 employed persons.

Outside of capital city CBD employment precincts, some of the precincts that employed the most people were:

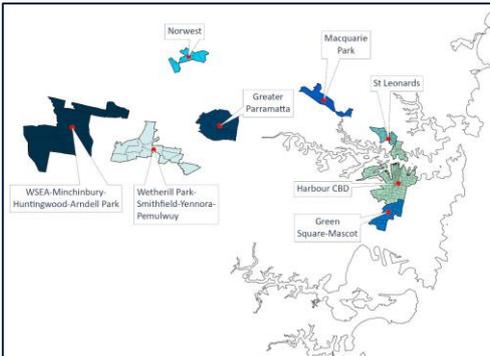
- Dandenong National Enterprise and Innovation Cluster (NEIC) in Melbourne (97,329 employed persons)
- Greater Paramatta in Sydney (78,287 employed persons)

- major hospital and university precincts like Monash National Employment and Innovation Cluster in Melbourne (85,488 employed persons).

The most rapidly growing employment precincts were low-density outer-city industrial areas. The number of employed persons grew by:

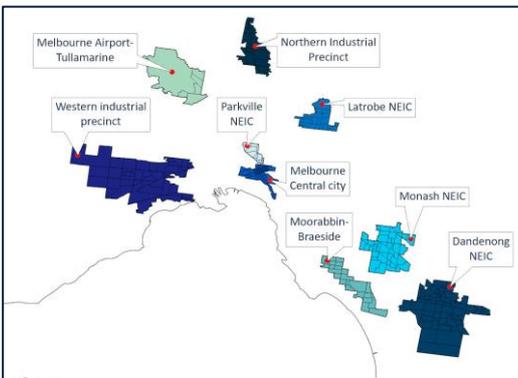
- 5.1% per annum in the Western Sydney Employment Area (precinct)
- 4.9% per annum in Melbourne’s Western Industrial precinct
- 4.4% per annum in Brisbane’s Sumner–Darra–Richlands–Wacol–Carole Park precinct
- 3.6% per annum in Melbourne’s Northern Industrial precinct.

Figure 45: Overlaid maps of major employment precincts that employed more than 30,000 persons in 2021 in Sydney



Source: [ABS] Australian Bureau of Statistics. (2021). *Census of population and housing*.

Figure 46: Overlaid maps of major employment precincts that employed more than 30,000 persons in 2021 in Melbourne



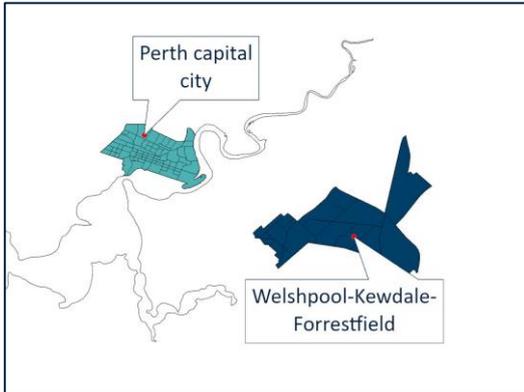
Source: [ABS] Australian Bureau of Statistics. (2021). *Census of population and housing*.

Figure 47: Overlaid maps of major employment precincts that employed more than 30,000 persons in 2021 in Brisbane



Source: [ABS] Australian Bureau of Statistics. (2021). *Census of population and housing*.

Figure 48: Overlaid maps of major employment precincts that employed more than 30,000 persons in 2021 in Perth



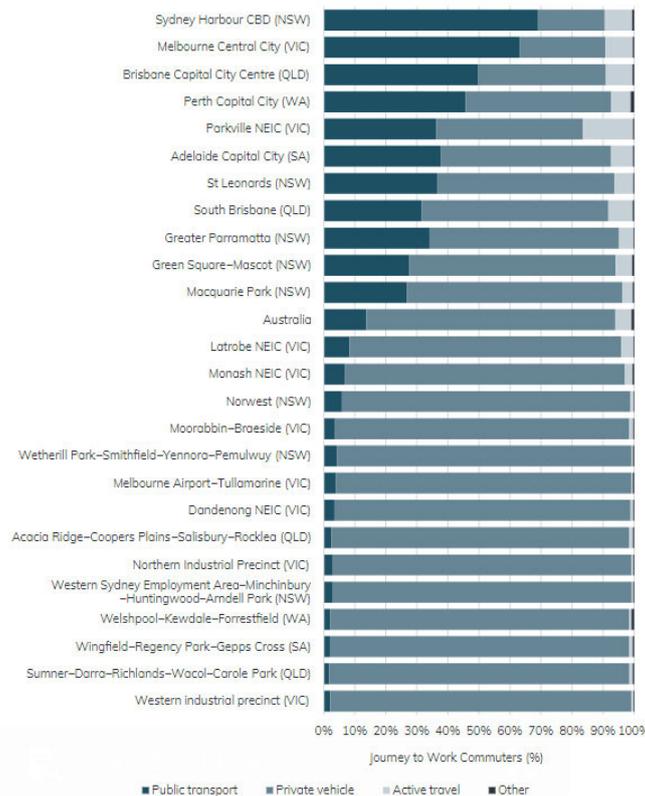
Source: [ABS] Australian Bureau of Statistics. (2021). *Census of population and housing*.

CBD-based precincts are well connected, with higher public transport use by workers commuting to these precincts. Between 38% and 69% of CBD-based workers commuted via public transport in 2016.^{vi} Other precincts, located in middle- or outer-city ring areas, were characterised by high private vehicle use for commuting and lower overall mobility for residents.

Industrial areas and transport/logistic hub precincts had public transport mode shares of less than 5%, as they tended to be located in the middle- and outer-city ring areas and away from transport hubs.

Some specialised health and education precincts tend to be located in or around transport hubs. Therefore, in 2016 they had relatively high public transport mode shares of 25% to 40%. The active travel mode share—travel that relies on human-powered mobility such as walking and cycling—is typically less than 10%, except in the Parkville National Employment and Innovation Cluster (Figure 49), most likely due to its nearness to the Melbourne CBD and significant walking/cycling infrastructure.

Figure 49: Employment precinct mode share, 2016



^{vi} Note: 2016 data is used instead of 2021 data, as the 2021 data is skewed due to COVID-19.

Gold Coast Health and Knowledge Precinct drives innovation and economic growth

The Gold Coast Health and Knowledge Precinct (GCHKP) is a partnership between the City of Gold Coast, Griffith University, Gold Coast Health and the Queensland Government.¹⁹⁴ The GCHKP is a 200-hectare master planned urban renewal and activation precinct that brings together:

- \$5 billion of infrastructure
- 15,000 jobs
- 20,000 students
- 1,000 researchers
- 800 research students
- over 100 clinical trials
- over 300 partnerships.¹⁹⁵

Key to the success of the precinct is the complementary mix of housing, transport, public services and employment options. The mixed-use community comprises:

- Lumina, the commercial cluster
- Smith Collective, residential and retail hub—Australia’s first build-to-rent development
- Griffith University
- Gold Coast University Hospital and Gold Coast Private Hospital
- COHORT innovation and co-working space
- Griffith Innovation Centre
- Queensland Academy of Health Sciences senior school
- Southport Sharks entertainment precinct
- Extensive parkland and greenspaces.¹⁹⁶

GCHKP supports local housing supply and tenure diversity through the adaptive reuse of the former athletes’ village from the 2018 Commonwealth Games.¹⁹⁷ By reusing the biggest Commonwealth Games village, it transformed 14 hectares of residential, retail, parkland and open space. The global best practice and multi-award-winning development received a 6-star rating from Green Star Communities sustainability tool.¹⁹⁸

The precinct is serviced by direct and accessible transport network links, including the low emissions light rail and 2 airports.¹⁹⁹ Active and healthy lifestyles are supported by the 95 hectares of allocated recreational green and open space.²⁰⁰

Night-time economy

The night-time economy (NTE) within a city typically includes business-related activity between 6 pm and 6 am, split into Core, Non-Core and Supply sectors.²⁰¹ Between 2021 to 2022, \$146 billion in sales turnover was generated by Australia’s core night-time economy:

- food
- drink
- leisure
- entertainment.²⁰²

Australia’s NTE has shown growth and resilience across most major cities from 2015 to 2022, even in the face of the COVID-19 pandemic. Australia’s major cities have experienced steady increases in NTE turnover, with CBDs particularly standing out. Adelaide had the highest turnover per capita at \$51,810 per resident, closely followed by Perth at \$42,217 per resident. This higher CBD turnover per capita compared to the broader

capital cities reflects the concentration of NTE establishments in city centres and their smaller residential populations.

Employment in the NTE sector has also grown for most of the 20 major cities, despite setbacks during the COVID-19 pandemic. In 2022, the sector employed:

- 172,090 people in Melbourne
- 160,320 people in Sydney
- 38,460 people in Gold Coast–Tweed Heads.

However, the recovery has been uneven, with half of the studied cities still below their 2019 employment levels.

While absolute employment numbers have grown for most of Australia's 20 largest cities, the concentration of NTE jobs declined between 2015 and 2022 for all except Perth. In 2022, cities with the highest NTE employment concentration as a proportion of total workforce in 2022 included:

- Hobart, 13.5%
- Canberra, 11.8%
- Gold Coast–Tweed Heads, 10.4%.

The number of NTE establishments has shown growth, accelerating during the COVID-19 pandemic for most cities. Between 2019 and 2022, annual growth in the number of NTE establishments in most of the 20 cities exceeded the level of growth between 2015 and 2019. All 20 cities had more NTE establishments in 2022 than in 2015:

- Melbourne, 31,276
- Sydney, 30,028
- Gold Coast–Tweed Heads, 3,976
- Newcastle–Maitland, 2,258.

Perth's CBD experienced a notable decline between 2015 and 2019, affecting its turnover and employment figures. Areas surrounding Perth's CBD saw smaller declines over this period and the sampled parts of the city saw a 0.8% decline over this same period.

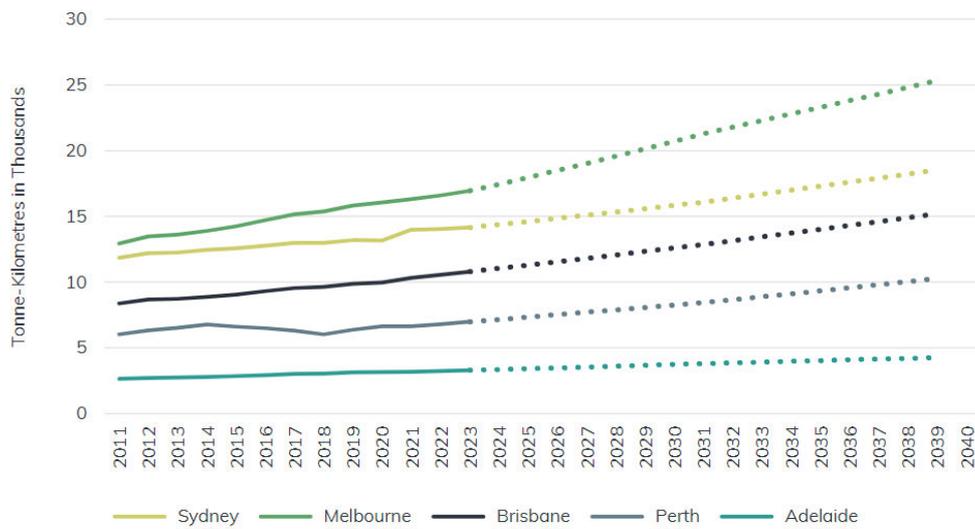
The number of NTE establishments in Victoria has grown strongly. For example, Ballarat (11.4%), Geelong (7%) and Bendigo (4.4%) have all exceeded or matched the 20-city average annual growth rate of 4.5%. This growth may be partially attributed to state government incentives encouraging businesses to reclassify their industry codes.

Transport networks

Demand for road freight transport is expected to continue to increase across most of the capital cities.

Road-freight volume is a measure of freight activity that represents mass (in tonnes) transported by distance travelled (in kilometres) with one tonne kilometre (tkm) equal to one tonne moved one kilometre. -Road freight volumes are projected to continue growing for Melbourne, Sydney, Brisbane, Perth and Adelaide to 2040 (Figure 50). Melbourne is expected to have the strongest growth over this time period based on historical freight volumes and population, and projected future population growth for the city.

Figure 50: Road freight volume (tonne–kilometres) top 5 capital cities from 2011 to 2023 and future estimates



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 February 2024). Customised Report on Transport [Data Set].

Toowoomba Bypass: a key link in Queensland’s freight network

The 41-kilometre Toowoomba Bypass, completed in 2019, provides an alternative crossing of the Toowoomba Range as part of Queensland’s principal east–west freight route.²⁰³

This \$1.6 billion project, jointly funded by the Australian and Queensland governments,²⁰⁴ features:

- an 800-metre viaduct over the existing Queensland Rail line
- a 30-metre deep cutting at the top of the Toowoomba Range, eliminating the need for a tunnel
- grade-separated interchanges to ensure smooth traffic flow.²⁰⁵

The bypass has improved freight efficiency by allowing heavy vehicles to avoid 18 sets of traffic lights in Toowoomba’s central business district (CBD), reducing travel time by up to 40 minutes. The decreased gradient (maximum 6.5% compared to the previous 10%) has reduced vehicle operating costs for freight operators.²⁰⁶ By redirecting up to 80% of heavy commercial vehicles away from Toowoomba’s CBD, the bypass has also enhanced urban liveability through reduced congestion, improved air quality and enhanced safety for local residents.²⁰⁷

The project strengthens Toowoomba’s position as a logistics hub by improving connections between agricultural and resource sectors and major ports, with expected economic benefits of US\$2.4 billion (AU\$3.7 billion) over 30 years.²⁰⁸

Delivered through a public–private partnership model, the bypass project demonstrates how strategic infrastructure investment can simultaneously boost regional productivity and enhance community outcomes.²⁰⁹

Passenger kilometres travelled

Passenger kilometres travelled, which measures the total distance travelled multiplied by vehicle occupancy, has fluctuated significantly across Australian capital cities between 2013–14 and 2022–23 (Table 7).

The largest capital cities demonstrated consistent growth in the pre-pandemic period:

- Sydney recorded 60.7 billion passenger kilometres in 2013–14, increasing to 64.9 billion by 2018–19—an increase of 6.9% from 2013–14.
- Melbourne showed similar growth, recording 61.9 billion passenger kilometres in 2018–19—an increase of 6.2% from 2013–14.

The COVID-19 pandemic significantly affected transport patterns:

- Sydney’s passenger kilometres decreased to 50.0 billion in 2021–22, representing a 23% reduction from its 2018–19 level.
- Melbourne’s figures decreased to 48.5 billion in 2020–21—the lowest recorded value in the decade.

The 2022–23 data indicates movement towards pre-pandemic levels, with Sydney reaching 59.5 billion passenger kilometres and Melbourne recording 57.0 billion. These figures remain below the peak values observed in 2018–19.

Smaller capital cities exhibited different patterns through this period. Brisbane, Perth, Canberra, Hobart and Darwin experienced comparatively modest decreases and have largely returned to pre-pandemic levels. For instance, Brisbane recorded 32.0 billion passenger kilometres in 2018–19. This decreased to 30.4 billion in 2021–22 and recovered to 31.7 billion in 2022–23.

Table 7: Passenger kilometres travelled (billions) in capital cities, 2013–14 to 2022–23

Year	Sydney	Melbourne	Brisbane	Perth	Adelaide	Canberra	Hobart	Darwin
2013–14	60.7	58.2	30.2	24.3	14.4	5.3	2.6	1.4
2014–15	61.7	59.1	30.7	24.6	14.6	5.4	2.6	1.4
2015–16	62.5	59.9	31.1	25.0	14.7	5.4	2.6	1.4
2016–17	63.6	60.6	31.4	25.0	14.7	5.5	2.6	1.5
2017–18	64.6	61.4	31.7	25.1	14.8	5.5	2.7	1.5
2018–19	64.9	61.9	32.0	25.1	14.6	5.5	2.7	1.5
2019–20	58.0	56.6	30.1	23.9	13.7	5.2	2.5	1.4
2020–21	56.6	48.5	31.3	24.7	14.0	5.4	2.5	1.5
2021–22	50.0	51.2	30.4	24.6	13.3	5.1	2.5	1.4
2022–23	59.5	57.0	31.7	25.9	13.9	5.5	2.4	1.4

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 February 2024). Customised Report on Transport [Data Set].

Digital connectivity

Digital connectivity—which includes fixed-line, fixed wireless and satellite broadband services (primarily delivered via the National Broadband Network (NBN)) and mobile networks (including 4G and 5G)—is foundational for modern, productive and innovative cities. These diverse platforms work in concert to support the complex digital ecosystem that underpins city economies and societies.

The COVID-19 pandemic has accelerated the shift towards digital ways of working, learning and accessing services. This trend is likely to continue, with projections that the number of digital and technology jobs will grow by 21% by 2033.²¹⁰ Overall, digital activity increased 8.6% (\$10.9 billion) in 2012–22, compared with growth of 11.7% for the total Australian economy.²¹¹

The benefits of digital connectivity are not always evenly distributed across cities, although it is improving.²¹² These inequalities can exacerbate existing socio-economic divides, potentially limiting access to essential services, employment opportunities and the burgeoning remote work economy. However, digital connectivity through high-speed broadband is almost ubiquitous in urban centres, reducing these inequalities.²¹³

The NBN, as Australia’s primary wholesale broadband network, plays a crucial role in this digital landscape. The NBN is available to approximately 12.5 million premises nationwide and currently services over 8.6 million premises. Other broadband networks also service approximately half a million premises throughout Australia. There is also a competitive market for the supply of network infrastructure to businesses and government

agencies. To support the provision of fixed-line infrastructure in new developments, regulatory requirements aim to ensure new developments are equipped with the necessary digital infrastructure from the outset.

These include:

- Part 20A of the *Telecommunications Act 1997*
- Telecommunications in New Developments (TIND) Policy.²¹⁴

More ubiquitous access to high-speed broadband has expanded the customer reach of e-commerce entrepreneurialism and provided better online access to work and education. Economic research²¹⁵ found that, in the period from 2012 to 2022, for every one megabit per second (Mbps) increase in average broadband speed, Australia's productivity-driven GDP increased by 0.04% on average. The cumulative GDP uplift during this 10-year period was estimated at \$122 billion. Further, the research estimated that a faster, higher capacity NBN network will improve Australia's GDP by a total of around \$400 billion over the 8 years from 2023 to 2030.

For areas where fixed-line broadband services are not feasible, fixed wireless and satellite technologies, including Low Earth Orbit (LEO) satellites, offer alternative connectivity solutions for fixed broadband services. These technologies are particularly important for ensuring digital inclusion in outer urban and peri-urban areas, supporting the trend of decentralisation and enabling productive work from a variety of locations. Fixed broadband connections are an important part of communications services, as they carry the bulk of traffic. For the period ending 31 December 2023, fixed broadband connections (NBN and non NBN-combined) carried 90% of the data downloaded over retail telecommunications networks in Australia, with mobile carrying the other 10%.²¹⁶

Mobile connectivity boosts Australia's productivity and allows more people to stay connected in a meaningful way. Where mobile coverage is not included in the design of new developments or expanding suburbs, there will be diminished digital connectivity and inclusion outcomes for residents in those areas. To support addressing this, the Australian Government has made amendments to the TIND Policy²¹⁷ to include several expectations for developers to help ensure mobile connectivity is available when people move into new communities.

Enhancing mobile networks, including the rollout of 5G technology, is increasingly important for urban productivity.²¹⁸ In 2023, 85% of the Australian population had access to 5G services, with this figure expected to grow in the coming years.²¹⁹ The enhanced speed and lower latency of 5G networks can support new applications in areas such as smart city technologies, autonomous vehicles and the Internet of Things.

As cities become increasingly reliant on digital infrastructure, the importance of cybersecurity also increases. In the 2021–22 financial year, self-reported financial losses due to Business Email Compromise cybercrime^{vii} were approximately \$98 million, representing an increase from the 2020–21 financial year of 16.55 million.^{220,221}

Melbourne's smart city showcases urban intelligence using innovative technologies

Melbourne's smart city initiative demonstrates how technology can enhance urban management and economic development through an integrated network of digital solutions. At its core is an advanced sensor network that provides real-time data on city dynamics, including monitoring 70,000 trees, supported by city-wide free Wi-Fi and Low Range Wide Area Networks.^{222,223}

The Emerging Technology Testbed drives innovation through key projects, including:

^{vii} Business Email Compromise (BCE) cybercrime is where malicious actors compromise organisations via email.

- the Fishermans Bend Digital Innovation Challenge, calling for big ideas that use technology and data to drive a thriving, resilient, healthy and circular city²²⁴
- Smart Stormwater Management, using new technology to improve infrastructure maintenance, enhancing resilience and efficiency²²⁵
- HeatSens—a digital tool for better urban heat management, improving liveability and resource use²²⁶
- Data in the Park, using sensors to guide park design, making the most of public spaces.²²⁷

Melbourne's open data policy has made over 200 datasets publicly available. This approach has catalysed new solutions and services, driving economic activity, improving city efficiency and enabling data-driven decision making.²²⁸

Partnerships between city council, industry and universities, such as the collaboration with ARUP and the University of Melbourne on the Creating a Smart City through Internet of Things project, accelerate innovation adoption.²²⁹

Melbourne's innovative approach has earned international recognition, including top accreditation from the World Council on City Data for adopting ISO 37120.²³⁰

Population

Overseas migration

There were 203,000 permanent and 431,000 temporary migrants living in Australia in August 2021 who arrived in 2018 and 2019. During the COVID-19 pandemic, this number reduced—between 2020 and 2021, 57,000 permanent and 111,000 temporary migrants arrived in Australia.

Migrants boost the labour productivity of Australian-born workers. On average, a region with a 10% larger migrant share has a 1.3% larger regional wage difference, which indicates a positive link between migration and labour productivity.²³¹

Over one million people arrived in Australia's capital cities between August 2016 and 2021.²³² In the 2022–23 financial year the number of migrant arrivals increased. Permanent migrants had not returned to pre-pandemic levels, but the number of temporary migrants exceeded pre-pandemic levels.

Permanent migrants generally enter Australia as skilled migrants or on a family visa:

- In 2018–2019, 48% were skilled and 37% were on a family visa.
- In 2020–2021, 44% were skilled and 48% were on a family visa.

Most permanent migrants live in Sydney and Melbourne, which together are home to 57% of the 2018–19 arrivals. However, humanitarian migrants^{viii} make a larger contribution to many non-capital cities such as:

- Albury–Wodonga, 53%
- Townsville, 41%
- Launceston, 38%.

The largest group (43%) of temporary migrants is students. Sydney and Melbourne top the temporary migrants per capita ranking at 25.1 and 24.1 temporary migrants per 1,000 population. Two of Australia's smaller cities have the highest number of permanent migrants per capita. For those arriving in 2018–19:

- Toowoomba has the highest rate at 16.5 migrants per 1,000 population
- Darwin the second highest at 12.3 migrants per 1,000 population.

Overseas arrivals tend to reside in the middle- and outer-city ring areas of Australia's 5 largest cities, which have large and diverse migrant communities. Across cities, middle-city ring areas have the highest rates of

^{viii} Not all humanitarian migrants are refugees, but all refugees admitted to Australia enter on humanitarian visas.

persons speaking non-English languages at home, with outer-city ring areas also having high rates of persons speaking non-English languages at home.

Internal migration

For internal migration (arrivals and departures from within Australia), Sydney and Melbourne experienced the largest net losses between 2016 and 2021, followed by Darwin and Adelaide. The largest net gains are outlined in Table 8.

For the largest 5 capital cities, the outer-city ring areas in Melbourne, Adelaide, Brisbane and Perth were the only areas to experience positive net migration. Sydney experienced negative net migration in all rings.

Table 8: Net internal migration for capital cities, 2016 to 2021

Capital city	In migration	Out migration	Net migration
Brisbane	219,091	-168,563	50,528
Melbourne	181,913	-252,543	-70,630
Sydney	138,854	-296,272	-157,418
Perth	102,170	-99,985	2,185
Adelaide	72,060	-76,097	-4,037
Hobart	27,146	-20,409	6,737
Canberra	60,149	-49,762	10,387
Darwin	22,276	-31,499	-9,223

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Population: Migration [Data Set].

In the non-capital cities (Table 9), the largest net internal migration gains were in the biggest cities adjacent to the largest capitals.

Non-capital cities with net internal migration losses were largely cities in northern Queensland: Townsville and Cairns. The largest migration flows in either direction for these 2 cities were (collectively) to the regions of the state outside Significant Urban Areas (towns and rural areas) and Brisbane. This is indicative of the strength of migration patterns within versus between states.

Table 9: Net internal migration for non-capital cities, 2016 to 2021

Non-capital city	In migration	Out migration	Net migration
Gold Coast–Tweed Heads	96,384	-68,958	27,426
Sunshine Coast	69,072	-42,081	26,991
Newcastle–Maitland	58,470	-42,135	16,335
Geelong	44,095	-25,293	18,802
Wollongong	31,201	-26,604	4,597
Townsville	27,178	-30,368	-3,190
Toowoomba	23,094	-20,303	2,791
Cairns	22,612	-23,861	-1,249
Ballarat	18,529	-12,226	6,303
Launceston	12,704	-10,837	1,867
Albury–Wodonga	15,588	-12,381	3,207
Bendigo	15,390	-11,678	3,712

Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (15 August 2024). Customised Report on Population: Migration [Data Set].

Internal migration flows for capital cities are also influenced by the age of people moving. The draw of education, employment and lifestyle opportunities in capital cities is significant for young people—a particularly mobile cohort in the population.²³³ Between 2016 and 2021, around 111,000 people aged 15 to 24 years moved into a capital city, with only 60,000 leaving. This is the only age category with a positive net migration flow into the capital cities.

Population growth

Population growth in Australia’s five largest cities is made up of various components. Between 2022 and 2023, a general pattern of high natural increase in the outer-city ring areas of these 5 cities was observed. Natural increase comprises births minus deaths in a geographic location. Across the 5 largest cities, the areas with the highest amount of growth driven by births were in the outer-city ring areas.

Melbourne’s population had a natural increase of 27,390 people between 2022 and 2023, with the outer-city ring area comprising 76.5% of this growth component. Across the 5 largest capital cities, only their outer-city ring areas had positive net internal migration, with inner and middle-city ring areas losing population through internal migration.

Outer-city ring areas tend to be the highest drivers of natural birth growth in Australia’s largest 5 cities (Table 10). Between 2012 and 2022, all 5 of Australia’s largest cities had a higher proportion of births occurring in the outer-city ring areas. In Sydney, 50.4% of all births between 2012 and 2022 were for residents in outer-city ring areas, with Melbourne (54.2%), Brisbane (52.2%), Perth (63.2%) and Adelaide (47.5%) all having the highest proportion of births occurring in outer-city ring areas.

Table 10: Components of population growth in the largest 5 capital city rings, 2022 to 2023

City	Ring	Natural increase	Net internal migration	Net overseas migration
Sydney	Inner	4,289	-16,365	45,080
	Middle	8,879	-26,065	66,827
	Outer	15,343	4,005	44,709
Melbourne	Inner	2,207	-3,699	37,368
	Middle	4,243	-13,381	64,649
	Outer	20,940	10,402	44,755
Brisbane	Inner	1,402	-199	13,338
	Middle	4,621	-1,414	21,947
	Outer	7,927	15,774	15,968
Perth	Inner	398	-1,422	15,378
	Middle	2,218	-2,734	17,920
	Outer	8,713	14,814	26,033
Adelaide	Inner	15	-1,975	7,712
	Middle	739	-2,122	13,020
	Outer	2,650	2,279	5,739

Source: [ABS] Australian Bureau of Statistics. (2024). Regional Population 2022–23.

Sustainable and resilient

Climate change

The economic cost of disasters to Australia is currently \$38 billion annually,²³⁴ with severe weather events becoming more frequent and intense.²³⁵ The change in weather patterns is likely to:

- extend tropical cyclones into southern Queensland and northern New South Wales
- increase bushfire danger in the south and east of Australia
- exacerbate droughts.²³⁶

Sea-level rise increases the risks of coastal flooding, storm surge, erosion and saltwater intrusion into groundwater systems.²³⁷ With most of Australia’s cities located on the coastline, this will increasingly affect urban populations living near coastal rivers and in low-lying areas that are particularly vulnerable to floods.²³⁸ The 2022 floods on Australia’s east coast are estimated to have cost \$7.17 billion in insured losses.²³⁹

Communities and numerous businesses located in the Greater Brisbane, Gold Coast–Tweed Heads and Moreton Bay–Sunshine Coast regions continue to recover from recent flooding, storm and tropical cyclone events. The estimated costs from the March to May 2022 south-east Queensland flood event were \$3.1 billion (tangible economic costs) and \$4.5 billion (intangible lifelong health and social costs).²⁴⁰

In early 2022, the Northern Rivers region of New South Wales was devastated by record-breaking flood levels in major rivers. The floods resulted in loss of life and forced mass evacuations and left many residents stranded on rooftops awaiting rescue. The disaster highlighted issues with flood preparedness and the need to mitigate against and adapt to climate change.²⁴¹

Climate change is intensifying Australia’s historically frequent fire seasons, as demonstrated by the 2019–20 Black Summer bushfires.²⁴² This event highlighted the impact of bushfires, resulting in the burning of 10,173 thousand hectares, destroying 3,100 home, the loss of 33 lives, significant mental health consequences, damage to cultural, natural and First Nations heritage sites, and the death of 1 billion native animals.^{243,244}

Disasters caused by natural hazards

The National Emergency Management Agency (NEMA) collects data on the location of disaster activations across local government areas (LGAs), as well as the quantum of Australian Government Disaster Recovery Payments (AGDRP) and Disaster Recovery Allowance (DRA) funds (Table 11). The highest AGDRP/DRA granted for cities between 2013 and 2023 included:

- Sydney, \$2 billion
- Brisbane, \$342 million
- Newcastle–Maitland, \$256 million
- Wollongong, \$183 million.

Many Local Government Areas have been affected by disasters more than once with 132 activated across Sydney LGAs, followed by 81 in Melbourne and 60 affected Brisbane. Amongst non-capital cities, Newcastle–Maitland (41) had the most activations, followed by Wollongong (23) (Table 11).

Table 11: City disaster activations and AGDRP/DRA funding provided, 2013 to 2023

City	Sampled LGAs	Internal LGA disaster activations	Total AGDRP/ADRA granted
Sydney	25	132	\$2,017,775,575
Melbourne	27	81	\$6,996,273
Brisbane	8	60	\$341,876,928

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Perth	8	9	\$1,000,115
Adelaide	8	11	\$1,498,228
Canberra	1	7	\$41,461
Hobart	6	9	\$0
Darwin	3	9	\$0
Gold Coast–Tweed Heads	1	11	\$51,276,453
Newcastle–Maitland	5	41	\$256,103,603
Sunshine Coast	2	7	\$45,128,033
Wollongong	3	23	\$182,712,408
Geelong	2	5	\$19,254
Townsville	1	10	\$89,676,211
Cairns	1	8	\$26,302,058
Toowoomba	1	10	\$13,588,411
Ballarat	1	7	\$72,032
Bendigo	1	7	\$5,584,097
Albury–Wodonga	2	10	\$1,634,092
Launceston	3	3	\$3,853,142

Source: [NEMA] National Emergency Management Agency. (2024). Customised Report on City Disaster Activations and AGDRP/DRA Funding Provided Between 2013 and 2023 [Data Set].

The National Flood Information Database estimates around 1.2 million properties across Australia have some risk of flooding, with around 230,000 of these attributed a 1 in 20 chance of flooding each year.²⁴⁵

While Australia remains a well insured nation overall, the country faces the challenge of the protection gap. Global reinsurer Swiss Re Institute estimated the protection gap for natural catastrophe losses in Australia between 2014 and 2023 to be US\$12 billion²⁴⁶ or AU\$17.8 billion.

Recent analysis²⁴⁷ shows the proportion of households experiencing insurance affordability stress increased from 12% in 2023 to 15% in 2024. Further, this research indicates home insurance premiums will continue to rise without:

- reductions in greenhouse gas emissions
- improvements to the resilience of existing homes
- enhanced building standards
- better land use and planning.

Further, over the past 3 decades the average annual cost of flood, hail, storm, bushfire and earthquake (based on the amount insurers paid to policy holders, averaged over the time and adjusted for inflation) has been increasing. Flood cost has been the fastest growing and the most significant over this period—its average annual cost has jumped from \$620 million over 3 decades to \$2.2 billion in the last 5 years.²⁴⁸

The most recent high-risk weather season in 2023–24 resulted in an overall insured loss of \$2.19 billion and 73% more claims made compared to the previous year. The period included Ex-Tropical Cyclone Jasper

impacting 160 km of coastline from Townsville to Cooktown and 3 major storm events impacting communities across Queensland, New South Wales and Victoria.²⁴⁹

The increasing frequency of disasters caused by natural hazards is contributing to increases in the amount of premiums collected by insurers, from around \$50 billion collected in 2011–12 to more than \$80 billion in 2023–24.²⁵⁰ Premium increases do not reflect insurer profitability. Australian Prudential Regulation Authority data shows declining sector profits since 2020, with home insurance product lines remaining unprofitable since 2019–20 despite ongoing premium increases.²⁵¹

Building resilience

The resilience of Australia's cities is especially challenged by natural hazards and the impacts of climate change. Extreme heat, heavy rainfall and coastal inundation, fire weather and drought impact communities and ecosystems.²⁵²

Adaptive capacity may be further strained if natural hazards combine with other stresses and shocks such as:

- an economic crisis
- a pandemic
- a housing crisis
- sensitivities across cities (for example, ageing infrastructure and deteriorating built-environment conditions).

These events impact cities in different ways through:

- direct impacts such as damage to a building after bushfires or flooding or due to sea level rise
- cascading impacts when damage to buildings and infrastructure leads to flow-on disruption of urban services, including transport, energy, water, telecommunications and food provision
- compounding impacts when impacts of hazards are exacerbated by pre-existing inequalities and vulnerabilities of urban communities.²⁵³

Climate change is also increasingly impacting food networks, which are vital for overall community resilience. Changing drought, flood, heat and bushfire conditions:

- impact food production
- change pests and diseases
- change growing conditions
- disrupt transportation and logistics
- impact water availability for irrigation.²⁵⁴

Urban planning and design

Net zero

Australia has committed to reducing greenhouse gas (GHG) emissions by 43% below 2005 levels by 2030 and reaching net zero emissions by 2050, in line with the Paris Agreement.²⁵⁵ While data for progress towards these targets is not currently available at the city level, cities are key to achieving these targets through:

- transitioning to renewable energy
- enhancing public and active transport
- promoting a sustainable economy
- improving water and waste infrastructure.

The built environment accounts for around 19% of total energy use and 18% of direct carbon emissions.²⁵⁶ Australia's cities are a major contributor to carbon emissions, but they are a key part of the solution too.²⁵⁷

Energy efficiency

NatHERS certification data shows varying patterns in Australia's residential energy efficiency from 2017 to 2023. While most major cities recorded fewer certificates due to reduced construction activity, 17 of the 20 major cities improved their average ratings. Sydney led these improvements, with new buildings typically

achieving 6 stars, while Canberra demonstrated the highest energy performance, averaging 6.9 stars for new dwellings.

Commercial building energy efficiency

Commercial buildings play an important role in reducing energy use and emissions. The National Australian Built Environment Rating System (NABERS) conducts annual energy ratings for offices, ranging from 1 to 6 stars. While voluntary, NABERS energy ratings covered an estimated 74% of the commercial office market in 2021.²⁵⁸ Companies using NABERS have saved approximately \$1 billion in energy costs and reduced greenhouse gas emissions by over 7 million tonnes since 1998.²⁵⁹

Most office energy rating certificates (89%) were issued in capital cities. The 2023 national average office energy rating was 4.6, excluding cities with fewer than 10 office buildings. Among 14 selected cities, the highest average ratings were in:

- Geelong, 5.1
- Newcastle–Maitland, 4.9
- Townsville, 4.9.

Among capital cities, Brisbane, Canberra and Sydney had the highest office energy ratings in 2023 (4.8 each).

The national average office energy rating increased from 3.6 in 2013 to 4.6 in 2023. Ratings improved in 13 of 14 selected cities, with the largest increases in:

- Gold Coast–Tweed Heads, up 2.8
- Townsville, up 2.2
- Brisbane, up 1.4.

Average greenhouse gas emissions per NABERS-rated office building declined across all 14 selected cities from 2013 to 2023, with a national decline of 56%. Melbourne had the largest absolute reduction (–1,107 Kt CO₂ per rating certificate on average), while Townsville had the largest percentage reduction (–64%).

ROE Highway Logistics Park uses sustainable innovation to set new benchmarks

The Roe Highway Logistics Park (ROE) is a 75-hectare estate in Kenwick, Western Australia, developed by Hesperia.²⁶⁰ The development has achieved quantifiable environmental outcomes through specific design and construction initiatives.

The development's environmental features include:

- use of low carbon concrete, reducing upfront embodied carbon by 41% compared to traditional concrete
- an estimated overall reduction of 92,000 tCO₂-e in upfront embodied carbon emissions
- integration of up to 2 MW of onsite solar PV with smart grid technologies
- onsite water recycling and planting of over 4,000 trees
- Western Australia's first 6 Star Green Star—Design & As Built industrial facility
- multiple sustainability awards, including Environmental Excellence at the 2022 Urban Development Institute of Australia National Awards.^{261,262}

One facility within ROE has achieved a 6-star green star rating, the highest possible rating from the Green Building Council of Australia, making it Western Australia's first industrial facility to reach this certification level.²⁶³

The project's use of low carbon concrete was developed in collaboration with Boral.²⁶⁴ This initiative, coupled with the integration of substantial onsite solar PV capacity positions ROE as a leader in sustainable energy management for industrial estates.²⁶⁵

The Clean Energy Finance Corporation's \$95 million investment in ROE marks its first direct investment to reduce embodied carbon in property construction.²⁶⁶

Climate-related heat-health risk

Extreme heat events are expected to increase in frequency and severity due to climate change.²⁶⁷ By 2050, the number of days over 35°C each year could double for one-third of Australian communities.²⁶⁸

Australian cities face heat-related risks:

- **Urban Heat Island Effect (UHI):** Cities can be 1 to 7 degrees hotter than surrounding areas.²⁶⁹ This occurs when natural land cover is replaced with heat-absorbing surfaces like roads and buildings.
- **Infrastructure strain:** Heat places pressure on energy and water resources, increasing the risk of power outages.²⁷⁰
- **Vulnerable populations:** Heatwaves lead to increases in mortality and morbidity. The health impacts of heat vary based on geographic, social and economic factors that affect individual vulnerability.²⁷¹ In particular, heatwaves pose health risks to older people, young children, First Nations people and those with existing medical conditions.²⁷²
- **Environmental impact:** Increased heat affects urban ecosystems, shifting habitat zones and disrupting ecological cycles.²⁷³ Increased heat can also increase air pollution.²⁷⁴

The Australian Climate Service recently launched the national Australian Bureau of Statistics Heat-Health Risk Indices (using data available as at November 2023 for Statistical Area 2 (SA2) areas defined at 2021) to support decision making on mitigation, preparedness and response options to extreme heat to reduce hazard exposure and social vulnerability.²⁷⁵

Findings show that, in 2023, 5.2% of the total population living in capital cities (941,765 people) lived in areas with larger heat-health risk (that is, in SA2s that were in the top 10% of the Heat-Health Risk Index) (Figure 51). Adelaide had the largest share of population (18.6%) in high-risk areas clustering in northern suburbs (Figure 52), where severe disadvantage was also common. Some of these areas also have a large share of population aged over 65 years old, which adds to the risk. Adelaide was followed by Brisbane (14.3%) and Darwin (4.4%). A small share of Sydney's population (0.2%) were living in high-risk areas. Canberra had no population living in these areas. Only 5 non-capital cities had areas of high heat-health risk:

- Toowoomba, 28.7%
- Townsville, 24.7%
- Geelong, 14.3%
- Cairns, 3.3%
- Gold Coast–Tweed Heads, 0.9%.

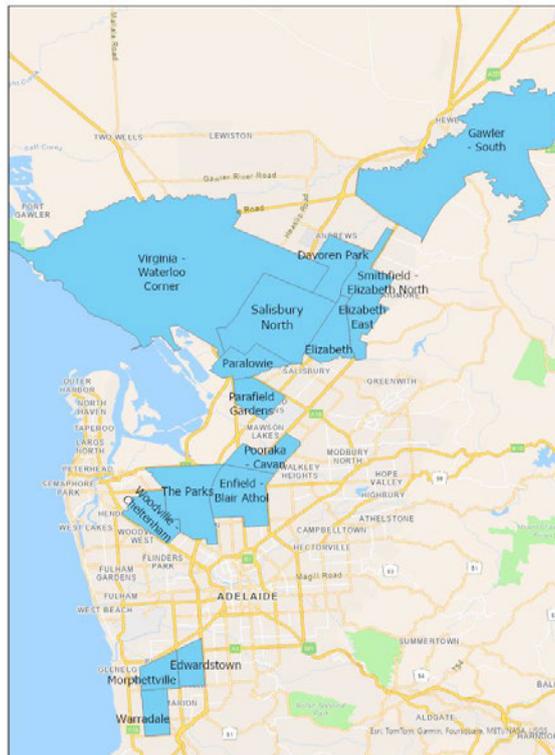
While overall the population of Australia's major cities has a much lower probability of living in an area of high heat-health risk than the population of the rest of Australia (5.1% versus 18.9%), with the increasing impacts of climate change and densification of urban areas, the risk factors may change.

Figure 51: Share of population that lived within an SA2 that was in the top 10% of the Heat-Health Risk Index, 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (7 August 2024). Customised Report on Heat-Health Risk [Data Set].

Figure 52: SA2s that are in the top 10% of the Heat-Health Risk Index, Adelaide



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (7 August 2024). Customised Report on Heat-Health Risk [Data Set].

Darwin's strategies to beat the heat

Darwin faces significant climate challenges, with projections indicating a dramatic increase in extreme heat days, from an average of 11 days above 35°C annually (1981–2010) to potentially up to 317 days by 2090.²⁷⁶ This trend is already evident, with Darwin experiencing 45 days above 35°C in 2019, including a record 11 consecutive days that surpassed the projections for 2030.²⁷⁷ In response, the *Feeling cooler in Darwin: Heat Mitigation and Adaptation Strategy* aims to reduce the seasonal impact of Darwin's hot and humid climate, including using heat mitigation methods to respond to climate change.

The strategy, delivered through the Darwin City Deal partnership between the Northern Territory Government, the Australian Government and the City of Darwin, and implemented via the CSIRO Darwin Living Lab,^{278,279} targets the Urban Heat Island Effect that currently makes Darwin CBD 2–3°C hotter than surrounding areas.²⁸⁰ The initiative outlines specific, measurable targets including:

- increase tree canopy cover from the current 11% to 30% by 2030
- implement reflective roofs to reduce surface temperatures
- install environmental sensors to monitor temperatures, humidity and other factors
- develop heat warning systems and adaptive behaviours
- create a network of cool routes and places throughout the city
- evaluate 13 mitigation scenarios involving strategies such as cool roofs and pavements, street shading, green roofs, greenery and evaporative systems.^{281,282}

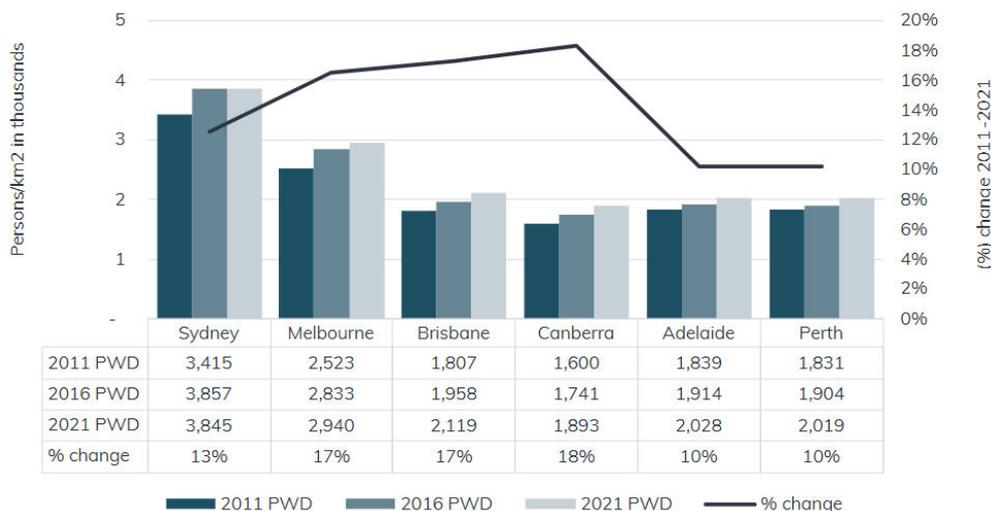
This collaborative approach between multiple levels of government and research institutions demonstrates how urban areas can effectively address extreme heat impacts while enhancing liveability and resilience.²⁸³ The strategy’s comprehensive framework aims to reduce peak electricity demand and total cooling load across the city centre, providing a model for climate adaptation in tropical cities.

Population density

While Australia has comparatively low levels of population density compared to other countries, many of the largest cities are increasing in population density.²⁸⁴ The 5 largest capital cities, as well as Canberra, increased in population-weighted density (PWD) between 2011 and 2021. Sydney (3,845 people/km²) and Melbourne (2,940 people/km²) experienced the largest increases (Figure 53).

PWD presents a more granular approach to measuring population density, which more accurately reflects the lived experience of population density for residents in a city. Higher PWD numbers generally reflect more walkable neighbourhoods and greater access to services.²⁸⁵

Figure 53: Population-weighted density for Australia’s largest capital cities and Canberra (persons/km²), 2011 to 2021

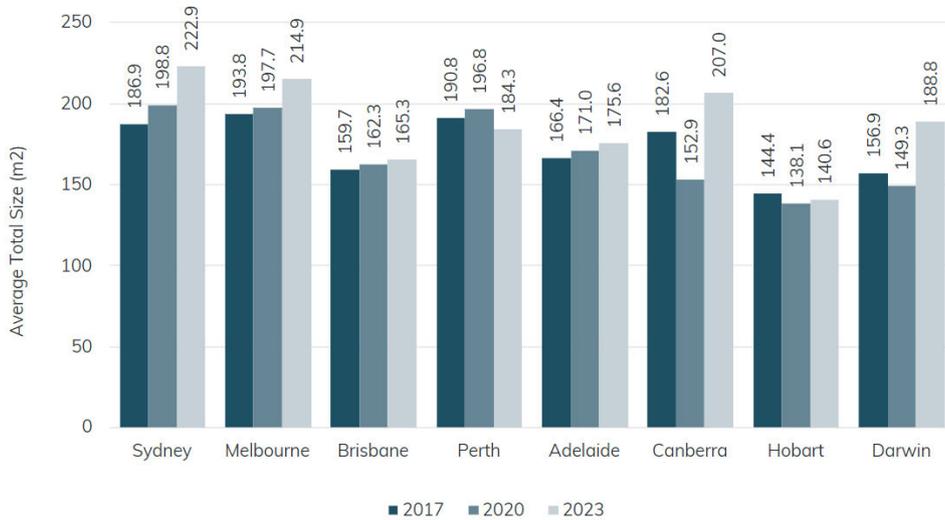


Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 March 2024). Customised Report on Density [Data Set].

Building density and efficiency

Australian homes are among the largest in the world.²⁸⁶ In 2023, the average building sizes of new houses reported in Nationwide House Energy Rating Scheme (NatHERS) certificates were largest for Sydney (222.9 m²) (Figure 54), while Hobart had the smallest house size (140.6 m²).

Figure 54: Average total size (m²) of new houses reported by NatHERS in capital cities, 2017, 2020 and 2023



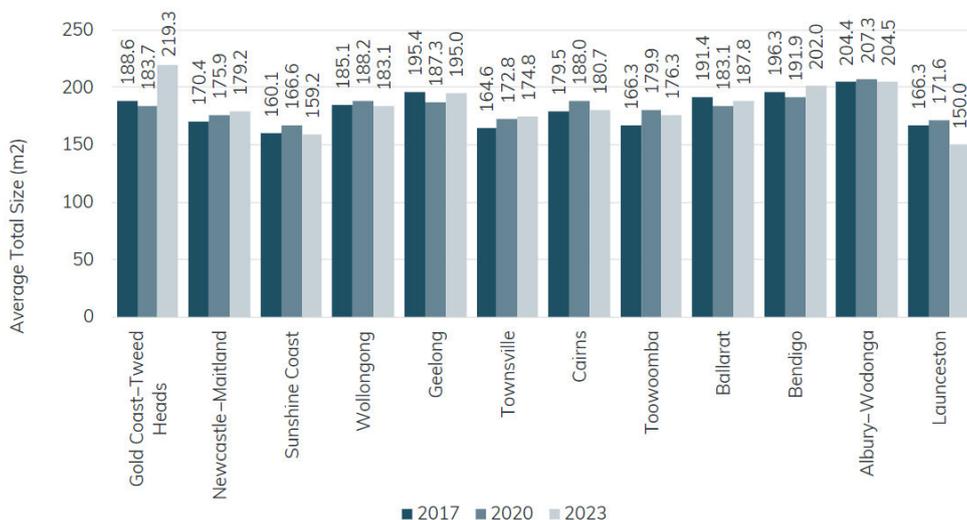
Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 June 2024). Customised Report on Building Energy Efficiency [Data Set].

Nationally, the average building size of new houses increased by 13.4 m² (or 7%) from 2017 to 2023. Sydney saw the largest increase (36.0 m²) while Launceston had the largest decline (down 16.3 m²).

This growth in house size contrasts with decreasing block sizes. Between 2012 and 2021, the average site area for new houses in Australia’s five largest capital cities fell from 496 m² to 432 m². Brisbane saw a 20% reduction from 571 m² to 459 m².²⁸⁷

NatHERS data shows over half of the major cities saw increases in average new house sizes from 2017 to 2023 (Figure 55).

Figure 55: Average total size (m²) of new houses reported by NatHERS in non-capital cities, 2017, 2020 and 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (27 June 2024). Customised Report on Building Energy Efficiency [Data Set].

Lightsview, a planned community in Adelaide, demonstrates sustainable development

Located 8 km from Adelaide’s CBD, Lightsview demonstrates how evidence-based planning and sustainable design can transform urban space. The 100-hectare site has evolved from vacant land into a thriving community of over 5,000 residents, offering:

- more than 2,000 housing allotments with a diverse range of dwelling types
- all homes within 300 metres of high-quality landscaped parks
- zoning that allows for small-lot, higher-density residential development
- water-sensitive urban design, including wetlands and an ornamental lake for stormwater treatment and flood management
- 6-star energy rating for 100% of dwellings, oriented for maximum winter warmth and summer shade
- over 3,600 trees and 61,000 plants and shrubs.^{288,289,290}

The project enhances urban sustainability through its innovative approach to water management. The central ornamental lake not only provides aesthetic value but also serves as a flood basin during storm events, showcasing multi-functional design.²⁹¹ This is complemented by a wetland system that treats stormwater before it enters the lake.²⁹²

Lightsview was delivered through a strategic partnership between Renewal SA (a South Australian Government agency) and private developer Peet Group. This public–private collaboration has delivered housing that exceeds the state government’s 15% affordable housing requirement, while maintaining diverse dwelling options.²⁹³

This award-winning development shows how urban infill projects can address the ‘missing middle’ in Australian cities. The development’s creative design delivered townhouses of varying sizes at price points to suit first home buyers, singles, couples and families, with these typologies ultimately making up over half of all lots in the development.²⁹⁴

Energy resilience

While energy data is not currently available at the city level, the resilience of energy systems serving cities is subject to the interactions between cascading climate-related hazards and the exposure and vulnerability of system components. These climate risks can be chronic or acute, with the severity of impacts depending on the:

- environmental, social and economic resilience characteristics of the geographical location
- system interdependencies of the infrastructure.

Energy system responses to these climate risks can also have positive or negative effects on resilience. Further, climate risks can be systematic and have ripple effects that are felt outside of the system of origin.

Australia’s rapid uptake of distributed energy resources, particularly solar photovoltaic (PV) systems, is supporting the renewable energy transition. As at 31 October 2024, over 3.96 million rooftop solar PV systems have been installed in Australia, contributing more than 24.7 gigawatts of total capacity to the national energy mix.²⁹⁵ PV system installation is projected to continue increasing in the coming decades,²⁹⁶ further increasing renewable energy inputs to the grid.

Canberra's battery project supports energy security

The Big Canberra Battery Project will deliver an integrated network of batteries with 250 megawatts (MW) of power and 500 MWh of energy storage.²⁹⁷ The ACT Government is leading the project with industry partners and Australian Government grant funding support.²⁹⁸

The Big Canberra Battery initiative significantly contributes to the ACT's long-term sustainability goals by supporting its continued commitment to 100% renewable electricity.²⁹⁹ By capturing energy from rooftop solar panels to power essential services across government sites, the initiative reduces reliance on grid electricity during peak consumption times, lowering both costs and environmental impact.³⁰⁰

The Big Canberra Battery Project includes:

- 250 MW/500 MWh grid-scale battery
- capacity to supply 23,400 households with their daily energy use on a single charge
- installation of batteries at 9 government sites, with 2 more planned for early 2025
- 3 medium-sized neighbourhood-scale batteries in Casey, Dickson and Fadden
- creation of approximately 180 to 200 local jobs.³⁰¹

The ACT Government has partnered with Eku Energy for the battery development under a revenue-sharing agreement, with 50% of the net revenue to be shared with the ACT.³⁰² The project received additional support through the Australian Government's Community Batteries for Household Solar Program, delivered in partnership with Evoenergy.³⁰³

Transport and emissions

Transport is now the third largest source of greenhouse gas emissions in Australia, accounting for 21% of the country's emissions in 2023.³⁰⁴ Road transport is the primary contributor, responsible for about 83% of transport emissions, made up of³⁰⁵:

- Light vehicles (passenger cars, motorcycles and light commercial vehicles) which generate nearly 60% of the sector's emissions
- Heavy vehicle emissions which account for 23% of all transport emissions.
- Further emissions (3%) are associated with the building, operation and decommissioning of transport infrastructure.

Transport activity is expected to continue to increase to 2050 in line with population and economic growth.³⁰⁶

Vehicles with Internal Combustion Engines (ICE) are a major source of road transport emissions due to their use of fossil fuels.³⁰⁷ In 2022, passenger cars and light commercial vehicles contributed over 10% of Australia's total emissions.³⁰⁸

The national growth rate for Battery Electric Vehicle (BEV) uptake was 303% between 2021 and 2023. Brisbane (317%) and Melbourne (307%) exceeded this growth rate for capital cities. Among non-capital cities, 9 surpassed the national growth rate, led by:

- Albury–Wodonga, 419%
- Cairns, 405%
- Launceston, 394%.

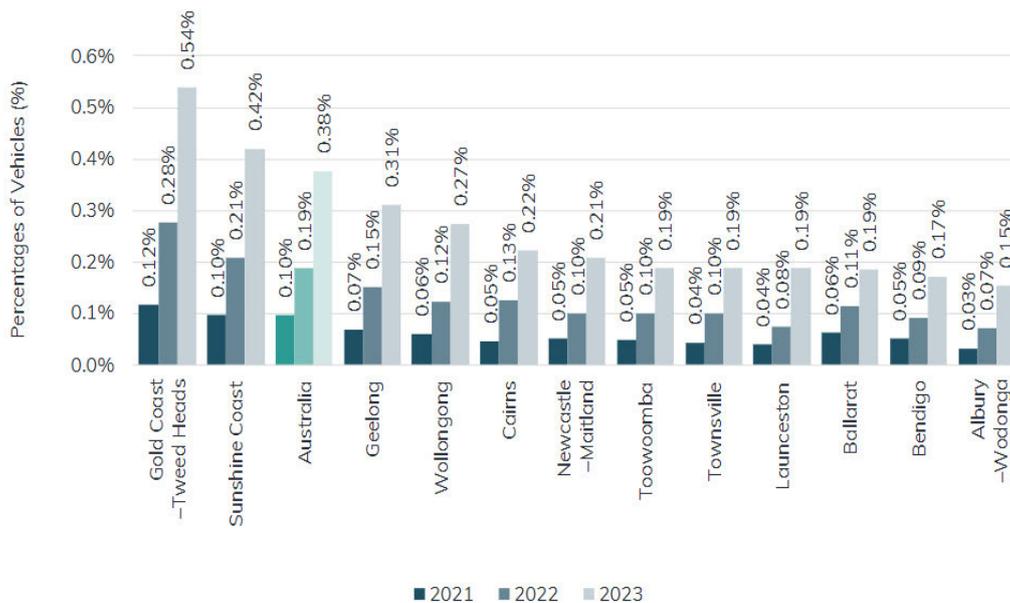
Canberra had the highest share of BEVs (0.95%) among capital cities (Figure 56), while Albury–Wodonga (0.15%) had the lowest share among non-capital cities (Figure 57).

Figure 56: Proportion of vehicles that are Battery Electric Vehicles (BEVs) by capital city, 2021 to 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (13 December 2023). Customised Report on Electric Vehicles [Data Set].

Figure 57: Proportion of vehicles that are Battery Electric Vehicles (BEVs) by non-capital city, 2021 to 2023



Source: [BCARR] Bureau of Communications, Arts and Regional Research. [DITRDCA] Department of Infrastructure, Transport, Regional Development, Communications and the Arts. (13 December 2023). Customised Report on Electric Vehicles [Data Set].

While the current market share of BEVs is low compared to ICE vehicles, demand remains high. Uptake is expected to continue increasing in Australian cities as:

- more models become available
- BEV technology improves and range increases
- charging infrastructure becomes more readily accessible.³⁰⁹

As the number of BEVs grow, battery recycling is becoming increasingly important. Most materials in BEV batteries can be fully recycled at the end of their life—before recycling, BEV batteries can be removed from vehicles and repurposed as stationary batteries to power houses and/or the electricity grid.³¹⁰

Circular economy

Circular economies aim to conserve natural resources, regenerate nature and ensure fair resource distribution. They focus on reusing materials, minimising waste and reducing environmental impact while creating local jobs and businesses.

A transition to a circular economy involves:

- ‘designing out’ waste and pollution across supply chains
- increasing resource recovery and repurposing throughout product lifecycles
- moving from a ‘take, make, waste’ model to a resilient, regenerative system.³¹¹

Circular Plastics Australia PET recycling plant, Albury–Wodonga

The Circular Plastics Australia PET Recycling Plant in Albury–Wodonga is a \$45-million facility that processes locally sourced PET plastic. The facility has increased Australia’s PET recycling capacity by two-thirds.³¹²

The plant’s infrastructure includes:

- 632kWh rooftop solar photovoltaic system with 1,421 solar panels to power the plant
- a recycling capacity equivalent to one billion PET plastic bottles annually
- production of over 30,000 tonnes of new recycled PET bottles and food packaging per year
- the ability to extend up to 50,000 tonnes per annum
- employment of about 40 local people for round-the-clock operations
- water treatment unit for water waste.³¹³

The facility is operated through a joint venture between Cleanaway Waste Management, Pact Group, Asahi Beverages and Coca-Cola Europacific Partners (CCEP).³¹⁴ The NSW Government’s Waste Less, Recycle More initiative provided \$4.8 million for facility establishment and \$495,000 for specialised equipment procurement. Additional funding was provided by the Department of Regional NSW and the Australian Government’s Recycling Modernisation Fund.³¹⁵

By integrating circular economy principles, clean energy use and water conservation, the plant demonstrates how industrial facilities can operate sustainably while contributing to local employment and economic growth.

Urban biodiversity

Australia is home to an estimated 700,000 unique flora and fauna species, many of which are endemic. Urban biodiversity plays a crucial role in maintaining the health and resilience of Australian cities³¹⁶ and provides numerous benefits, including:

- enhanced physical and mental health through stress reduction and physical activity
- ecosystem services such as air purification, water management and temperature regulation
- habitat for native flora and fauna
- cultural and educational opportunities
- mitigation of air pollution, excessive heat and noise exposure.

While data about urban biodiversity is not currently available at the city level, Australian cities are focusing on protecting and restoring natural urban areas. This includes:

- natural habitats (wetlands, rivers, and coastal areas)
- parks and green spaces
- green roofs and infrastructure
- urban forests
- connected networks between towns, suburbs, parks and reserves.

Perth's First Nations-led approach to urban water management

The Western Australian Government launched the Kep Katitjin–Gabi Kaadadjan Waterwise Perth Action Plan 2 in 2022. A 2-year water management plan, co-designed with Danjoo Koorliny leaders and Bindjareb Elders, that includes initiatives to heal waterways and develop an approach to deliver enduring waterwise outcomes on Whadjuk and Bindjareb Country.³¹⁷ 'Water knowledge' is referred to as Kep Katitjin in Whadjuk and Gabi Kaadadjan in Bindjareb dialects.

The first 2 iterations of the action plan (2019–2023) achieved water savings of 12 gigalitres of water in Boorloo (Perth) and Bindjareb (Peel), equivalent to filling Perth's Optus Stadium 12 times.³¹⁸ The Kep Katitjin–Gabi Kaadadjan plan includes urban greening initiatives, water efficiency standards and water sensitive solutions. These actions aim to create a more resilient urban ecosystem that can better withstand the impacts of climate change while providing benefits to the community and wildlife.³¹⁹

The plan addresses specific climate change challenges affecting Perth's water resources: reduced rainfall, increased hot days and declining groundwater aquifers.³²⁰ Implementation measures include:

- climate projections guidance
- climate risk assessment
- emissions reduction measures
- climate resilient water supplies
- planning for reaching net zero emissions.³²¹

In October 2024, the program realised its third plan, extending implementation to selected regional urban centres across Western Australia.³²²

Emerging cities

Emerging cities, also known as secondary cities or intermediary cities, are non-capital regional urban areas connected with national and global systems.³²³ They offer liveable and affordable alternatives to metropolitan areas, contributing to sustainable growth and enhanced liveability.³²⁴

The COVID-19-pandemic-driven pattern of increased working from home, and the technological developments that enable this, contribute to the urban resilience of Australia's secondary cities.³²⁵

This section focuses on 2 of Australia's secondary cities:

- Alice Springs, Northern Territory
- Bunbury, Western Australia.

Bunbury is the main economic hub in its region, mainly employing local residents. Alice Springs is a tourism and First Nations cultural hub dominated by Health Care and Social Assistance sector employment. But these cities also share common challenges as growing regional centres:

- They are relatively isolated locations, and this impacts access to markets, services and infrastructure.
- They need to diversify economies beyond existing dominant sectors.
- Infrastructure investments are needed to support growing populations.
- There are increasing challenges in housing affordability, health care access and environmental sustainability.

Bunbury

Bunbury is a coastal city 2 hours' drive from Perth at the gateway of Margaret River region and surrounded by countryside. As Western Australia's 'second city' and the heart of the Bunbury–Geographe region, Bunbury is the service centre of Western Australia's south-west.

Bunbury has a growing population:

- In 2023, Bunbury had a population of 81,367 people.
- This is projected to reach 93,840 by 2031 (1.8% growth per annum).
- This is higher than the city's historical growth rate of 1.4% per year (between 2018 and 2023), which was in line with the Australian average (1.4% between 2013 and 2023).

Bunbury has a growing diverse economy. Key industries are in the retail and manufacturing sectors.

In 2021, of employed residents:

- the Health Care and Social Assistance sector employed 15.4%
- the Construction sector employed 11.3%
- the Retail Trade sector employed 10.6 %
- the Manufacturing sector employed 9.6%.

The city's fastest growing industries between 2016 and 2021 were:

- Health Care and Social Assistance, which added 1,279 employed persons
- Mining, which added 707 employed persons.

The Port of Bunbury is one of Australia's largest regional ports. In 2023, it processed 15.3 million tonnes of exports valued at \$18.6 billion, with alumina as the primary export by volume. The port has significant expansion potential, particularly in lithium exports, which have increased markedly between 2018 and 2023. The Bunbury sub-region hosts the Greenbushes spodumene (lithium) mine, recognised as the world's largest hard rock spodumene deposit.³²⁶

Employment and commuting patterns

Bunbury is the main employment hub in the south-west region:

- 73% of employed residents work within city boundaries
- 11% work in nearby towns (Collie, Harvey, Dardanup)
- 11% of Bunbury's workforce comes from nearby towns (Capel, Dardanup, Harvey)
- 4% from Busselton
- 3% from Perth.

Unlike other 'satellite' cities, Bunbury residents typically do not commute to Perth for work.

Population growth and housing demand

In the next 20 to 30 years, the wider Bunbury–Geographe region (including Bunbury and surrounding towns)³²⁷ is planning to accommodate 200,000 people,³²⁸ requiring:

- acceleration of population growth from 1.4% to 2.0% per year
- additional supply of approximately 41,340 dwellings.

Bunbury faces housing availability challenges:

- The number of residential building approvals is lower (11 per 1,000 existing dwellings) than the national ratio (19) in 2022.
- There is a need for 20 new dwellings per 1,000 existing dwellings annually to meet targets.

The 2023–24 Western Australian Budget allocated \$750 million for housing supply and choice initiatives, potentially addressing these issues.³²⁹

Bunbury's housing market, while facing affordability challenges, is less pressured than other major Australian cities:

- **Rental unaffordability:** 36% (2021), similar to national rate of 35%.
- **Rent to income ratio:** 0.26 (2023), comparable to Perth (0.25) and national rate (0.27).
- **Mortgage unaffordability:** 13% (2021), lower than national rate (16%).
- **Dwelling price to income ratio:** increased from 4.1 to 4.7 (2022–2023), more affordable than Perth (5.1) and national average (7.0).

Alice Springs

As the Northern Territory's second largest town centre, Alice Springs has geographical features that afford it unique opportunities compared to Australia's largest cities. The city has a relatively small population and economy, serving as a hub for First Nations communities and tourists exploring the Australian outback.

As of 2023, Alice Springs had:

- a population of 29,213
- a steady annual growth rate of 1.4% between 2018 and 2023, matching the Australian average (between 2013 and 2023)
- when coupled with its surrounds, a wider region population of 40,612 (2023)
- projected regional population growth of 42,103 by 2031 (0.5% annual growth).

Employment

There were 1,041 extra employed persons in Alice Springs in 2021, compared to 2016, with 81% of growth in Health Care and Social Assistance (845 persons).

Employment in Health Care and Social Assistance is particularly high compared to Darwin (14.2%) and is proportionately higher than any of Australia's major cities. This could be driven by high-quality hospital facilities, with the Alice Springs Hospital classified as a Public Acute Group A hospital.³³⁰

Functioning as a service centre for the wider region, Alice Springs has high proportions of people employed in human services. Of employed residents in 2021:

- the Health Care and Social Assistance sector employed 23.5%
- the Public Administration and Safety sector employed 18.2%.

Alice Springs is the highest performing tourism region in the Northern Territory outside of Darwin:

- 1,300 residents in the city are employed in the industry
- the industry is underpinned by the city's deep and rich cultural heritage, making it a favoured tourist destination
- 2021–22 tourism expenditure was \$251 million and tourism Gross Regional Product was \$167 million.

In 2021, 4.5% of employed residents worked in the cultural and creative sector. This is higher than the average for regional Australia (3.7%) but lower than the national rate (5.9%).

Unique economic opportunities

The city is also internationally recognised as one of the best locations in the world for high altitude pseudo-satellites (HAPS) and stratospheric ballooning. The Northern Territory Space Strategy identifies the unique opportunities afforded by Alice Spring's geography and aims to make the city a hub for HAPS.³³¹

Economic opportunity in the area will be increased through the creation of the Northern Territory's first rare earths mine and refinery (135 km north of Alice Springs), with the support of the Australian Government's Northern Australia Infrastructure Facility. The Nolans Bore Rare Earths Project will create and deliver a forecast:

- 334 jobs during construction and operation
- total public benefit of \$1.4 billion
- target commitment of up to 20% local First Nations employment over the life of the project.

The project will be the first major project constructed in the Northern Territory since development of the Ichthys LNG Project by INPEX in 2018.³³²

Housing affordability

Housing affordability pressures are less pronounced in Alice Springs compared to other cities.

Compared to national averages:

- **Rental unaffordability:** 22% (2021) compared to 35% nationally.
- **Rent to income ratio:** 0.23 (2023) compared to 0.27 nationally.
- **Mortgage unaffordability:** 11% (2021) compared to 16% nationally.
- **Dwelling price to income ratio:** 4.2 (2023) compared to 7.0 nationally.

Despite current affordability, 2 factors could alter this situation in the future:

- **Housing supply:** If new housing construction does not keep pace with population growth, it could lead to shortages and increased prices.
- **Remote location costs:** The city's isolated position increases the cost of goods and services, which may gradually impact overall living expenses and housing affordability.

The relatively low residential building approval to existing dwellings ratio (9 per 1,000 in 2022) could cause future issues in affordability, with the national ratio being 19 per 1,000.³³³ However, this would require the population growth to accelerate far quicker than projections are pointing to.

Data and evidence

Methodology

This report builds upon the foundation laid by the Department of Infrastructure and Transport's State of Australian Cities reports (2010–2015). It employs similar quantitative methods while expanding on qualitative case studies. The primary data source is the Australian Bureau of Statistics (ABS) Census of Population and Housing for 2011, 2016 and 2021. Some examples of additional datasets include:

- ABS Estimated Resident Population
- Australian Department of Climate Change, Environment, Energy and Water and NSW Department of Climate Change, Environment, Energy and Water (NABERS and NatHERS data)
- Council of Capital City Lord Mayors (CCCLM) and Ingenium
- Australian Urban Observatory.

The Urban Research team in the Bureau of Communications, Arts and Regional Research (BCARR) conducted the majority of data analysis underpinning this report, ensuring rigorous quality assurance across all datasets.

The *State of the Australian cities 2024* report is accompanied by a State of Australian Cities 2024 data file that makes data available for the 20 largest Australian cities and covers the key data points presented in this report. The data file meets the Australian Government's open data requirements and is available from <https://catalogue.data.infrastructure.gov.au/> or from <https://data.gov.au/home>.

Geographic units and classifications

This report uses various geographic units adhering to the ABS Australian Statistical Geography Standard (ASGS) Edition 3:

- Greater Capital City Statistical Areas (GCCSAs)
- Significant Urban Areas (SUAs)
- Statistical Areas Level 4 (SA4s)
- Statistical Areas Level 2 (SA2s)
- Local Government Areas (LGAs).

SA2s, designed to reflect functional areas representing communities or suburbs, serve as the smallest unit of analysis in this report. They typically have populations ranging from 3,000 to 25,000 persons, with an average of about 10,000 persons. The BCARR city rings can be found in the 'Glossary'.

This report employs both place of usual residence (PoR) and place of work (PoW) Census data, depending on the relevance to the issue being analysed. For industry and occupational data, the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006 and Australian and New Zealand Standard Classification of Occupations (ANZSCO) 2013 have been used.

This report uses both percentages and percentage points. Percentage rates of data points are provided throughout the report to denote changes in numbers and statistics. When noting differences between percentages in this report, percentage point changes have been used. For example, a drop from 10% to 9% would be noted as 1 percentage point decrease rather than a 10% decrease.

Key data points and methodologies

Data point selection criteria

To prepare this report, a vast range of sources were consulted to identify potential data points. Consulted sources included, but are not limited to:

- stakeholder consultation:
 - Urban Policy Forum
 - Australian Government agencies
 - state and territory governments
 - representative bodies, such as the CCCLM
- best practice research
- data points used in previous versions of State of Australian Cities reports
- the National Urban Policy.

Data points were then shortlisted based on the below criteria, with the objective of developing a nationally consistent, repeatable dataset that provides insights into life in Australia's major cities.

The final set of included data points is not intended to be exhaustive. Data points may also be subject to future refinement and changes.

Data point criteria

The selection of data points for this report has been guided by several key criteria. This approach has resulted in data points that are informative, relevant, practical and inclusive, providing a foundation for assessing and guiding progress in cities in line with the National Urban Policy.

Alignment and measurability

Data points were selected based on their measurability and relevance, aligning with the National Urban Policy while establishing benchmarks to track progress over time. This approach enables policymakers and stakeholders to effectively monitor and assess performance.

Stakeholder engagement

Stakeholder consultation played an important role in selecting data points of interest and usefulness to a broad user range.

Accuracy and clarity

Accuracy and clarity were included in the selection process. Data points that objectively and precisely represent the Policy's goals, effectively illustrate complex issues and can be communicated unambiguously were prioritised. This ensures policymakers, the public and other stakeholders can readily comprehend city performance and progress over time.

Practical considerations

Practical considerations such as cost-effectiveness and timeliness also influenced chosen data points. Data points offering the greatest value relative to data acquisition and analysis costs, and those that can be updated regularly to provide current information, were selected. Where possible, the most recent datasets available were used to accurately reflect the state of the 20 cities.

Inclusivity

Inclusivity was a key consideration throughout the selection process. Comprehensive representation of diverse populations, including First Nations people, was ensured. Data points that could provide misleading information about, misrepresent or stigmatise particular groups have been avoided.

Case study selection methodology

Quantitative and qualitative data provide different outcomes and are often used together to get a full picture.³³⁴ To enrich the quantitative data points, this report includes case studies, based on qualitative research.

The case studies were selected to illustrate 'better practice' in urban planning and design, aligned to the Policy's goals. The case studies move from theory to practice showing how these goals can appear in action.

Case study selection criteria

The selection of case studies for this report has been guided by key criteria. This approach has resulted in case studies that are informative, relevant and inclusive. Importantly, these examples demonstrate better practice in urban planning and design that align to the National Urban Policy goals.

Informative

Listening to stakeholder ideas and input was critical to identifying informative case studies.

Stakeholders included:

- Urban Policy Forum
- state and territory governments
- Australian Government departments.

Extensive desktop research was then undertaken to understand specific case studies and their better practice applicability. Case studies that demonstrate clear public benefit and impactful initiatives were selected.

Relevant

Potential case studies were then mapped against the National Urban Policy's goals. The objective was to find case studies that illustrated the goals in action, showing a real-life application of the theory.

Inclusive

Care was taken to ensure all 8 jurisdictions (every state and territory) were represented. This was important to highlight the diversity of better practice approaches and to demonstrate there is not a one-size-fits-all solution.

Specific data point methodologies

Housing affordability:

- Housing affordability is measured using dwelling price to income ratio and rent to income ratio, aligning with international studies.³³⁵
- It uses median household gross income to align with ABS census measures of affordability.
- A dwelling price to income ratio of less than 4 is considered more affordable, while ratios between 4 and 10 are increasingly unaffordable.

Mortgage affordability and rent affordability:

- Mortgage affordability is calculated by taking rent or mortgage payments and dividing by total household income. The threshold for mortgage and rental affordability is 30% of total household income.
- Households where it was 'unable to be determined' if rent/mortgage payments were more than 30% of income were excluded from the denominator.

- For rings and SUAs, the data point was derived by summing up the numerator and denominator for contributing SA2s, and then dividing the numerator by the denominator.

Severe disadvantage:

- Socio-Economic Indexes for Areas (SEIFA) is a group of 4 indexes that provides a relative measure of socio-economic advantage and disadvantage for small areas.
- The 4 SEIFA indexes each measure different aspect of advantage and disadvantage. They are built from the ABS Census of Population and Housing data every 5 years.
- This report uses the 2021 Index of Relative Socio-Economic Disadvantage (IRSD). The IRSD measures relative disadvantage for each area. A low IRSD score indicates high disadvantage, while a high score indicates low disadvantage. It is not possible to use this index to assess areas of advantage.
- The indexes are designed to reflect a summary of the area, not individual circumstances, so there may be relatively advantaged individuals living in an area with a relatively low SEIFA score.
- This brief uses the SA2 level for analysis, with the SA2's score being a population-weighted average of the SA1 scores across all SA1s that comprise the SA2.
- The index scores do represent a quantity, but SEIFA data also contains an area's rank and percentile. The 5th percentile used here contains all the areas that are ranked in the bottom 5% of areas.

Homelessness:

- The Homelessness national total is from ABS, *Estimating homelessness: Census, 2021* and is slightly different from TableBuilder totals in the data sheet, due to randomisation.
- Severe crowding conditions are operationalised in the Census as living in a dwelling which requires 4 or more extra bedrooms to accommodate the people who usually live there, as defined by the Canadian National Occupancy Standard (CNOS).
- Data on homelessness is taken from the Homelessness operational group (OPGP) Census data item.
- There are 2 groups according to the ABS definition:
 - OPGP and Other marginal housing groups: The categories listed under OPGP (categories 1–6) can be summed to form a total estimate of homelessness.
 - The categories listed under Other marginal housing groups (categories 7–9) are considered to be 'marginally housed'.
- Data for capital cities reflects ABS GCCSA boundaries for 2021. Data for other cities reflects ABS SUA boundaries for 2021.

Liveability data points (methodology applied by the Australian Urban Observatory) include the following:

- The health infrastructure index is a score out of 6 based on the availability of the following 6 health infrastructure types in range:
 - residential aged care (1 km)
 - dentists (1 km)
 - general practitioners (GPs) (1 km)
 - maternal, child and family health centres (1 km)
 - other community healthcare centres (1 km)
 - pharmacies (1 km).
- The education infrastructure index is a score out of 4 based on the availability of the following 4 education infrastructure types in range:
 - child care (0.8 km)
 - out of school hours care (1.6 km)
 - government primary schools (1.6 km)

- government secondary schools (1.6 km).

Child care data:

- There are 29 child care types in Household, Income and Labour Dynamics in Australia (HILDA) survey in 2022 when parents are and are not working. Households use informal child care if they used one of the following:
 - child's grandparent who lives with us
 - child's grandparent who lives elsewhere
 - other relative who lives with us, other relative who lives elsewhere
 - a friend or neighbour coming to our home
 - a friend or neighbour in their home
 - a paid sitter
 - nanny, other 1 and other 2.
- Households use formal child care if they used one of the following:
 - family day care
 - long day care centre at workplace
 - private or community long day care centre and kindergarten/pre-school.
- Households are not using informal or formal child care if they are using one of the following:
 - me or my partner
 - the child's brother or sister
 - other parent not living in household/ex-partner.

Access to open public space (methodology applied by the Australian Urban Observatory) is measured by:

- the percentage of dwellings within 400 metres of public open space
- larger than 1.5 hectares.

Liveability data points (methodology applied by the Australian Urban Observatory) include the following:

- The cultural infrastructure index is a score out of 3 based on the availability of the following 3 infrastructure types in range:
 - a museum or art gallery (3.2 km)
 - a cinema or theatre (3.2 km)
 - a library (1 km).
- The community and sport infrastructure index is a score out of 3 based on the availability of the following 3 community and sporting infrastructure types in range:
 - community centres (1 km)
 - public swimming pools (1.2 km)
 - sports facilities (1 km).

Urban connectivity:

- Commuting distance is determined by estimating the distance between the place of usual residence and the employer's usual workplace address for employed residents on Census day and includes work from home.
- For the purposes of this report, average travel distance excludes employed residents who worked from home on Census day.
- People who used a bicycle in combination with another mode (for example, public transport, private vehicle, other mode) are excluded from the 'Bicycle' category.
- Passenger vehicles in the total passenger kilometres travelled include passenger cars, commercial vehicles, motorcycles, heavy rail, light rail, bus and ferry. For more

information, please see the *Australian infrastructure and transport statistics—yearbook 2023*.

Liveability data points (methodology applied by the Australian Urban Observatory) include the following:

- Walkability for transport is calculated based on:
 - land use mix and services of daily living (something to walk to)
 - street connectivity (a way to get there)
 - dwelling density (higher population densities are associated with increased populations needed to supply services and different land uses).
- Access to public transport is a proportion of dwellings located:
 - within 400m of a regular public transport stop
 - with at least one scheduled service every 30 minutes between 7:00 am and 7:00 pm on a normal weekday.

The component scores are standardised to the average, which gives both positive (above the average) and negative (below the average) final index scores.

Gross Regional Product (GRP):

- Estimates are generated by BCARR at GCCSA and SA4 scales for 2015–16 and 2020–21.
- GRP is based on the method from the Department of Industry, Innovation and Science *Australian industry report 2016*, originally derived from Queensland Treasury and Trade (2013) work.

Industry employment:

- Industry employment uses knowledge sector and high-tech manufacturing as distinct industry groups.
- Knowledge sector is defined by specific ANZSIC codes: Information Media and Telecommunications; Financial and Insurance Services; Professional, Scientific and Technical Services.
- High-tech manufacturing uses a composite designed by BCARR.³³⁶

Cultural and creative sector employment:

- is based on the industry scope of the ABS Cultural and Creative Activity Satellite Account 2014, which encompasses 43 detailed cultural and creative industries.

Education and skills:

- **Certificate III or above:** Number of people aged 25 to 64 with a Certificate III or above divided by total number of people aged 25 to 64, number of people aged 25 to 34 with a Certificate III or above divided by total number of people aged 25 to 34, and number of people aged 35 to 64 with a Certificate III or above divided by total number of people aged 35–64. 'Not applicable', 'Not stated', and 'Level of education inadequately described' were subtracted from totals. 'Level of education inadequately described' was under supplementary codes in TableBuilder along with 'No educational attainment'. To keep 'No educational attainment' in the total while removing 'Level of education inadequately described', the data was extracted at level 2.
- **Bachelor degree or higher:** Number of people aged 25 to 64 with a bachelor degree or higher divided by total number of people aged 25 to 64 ('Not applicable', 'Not stated', and 'Level of education inadequately described' were removed from total). 'Level of education inadequately described' was under supplementary codes in TableBuilder along with 'No

educational attainment'. To keep 'No educational attainment' in the total while removing 'Level of education inadequately described', the data was extracted at level 2.

- **Certificate or Diploma:** Number of people aged 25 to 64 with a certificate or diploma divided by total number of people aged 25 to 64 ('Not applicable', 'Not stated', and 'Level of education inadequately described' were removed from total). 'Level of education inadequately described' was under supplementary codes in TableBuilder along with 'No educational attainment'. To keep 'No educational attainment' in the total while removing 'Level of education inadequately described', the data was extracted at level 2.

Heat-Health Risk Index (HHRI):

- constructed by the Australian Climate Service
- 2021 HHRI data used for 2021 SA2 areas
- available at 2021 SA1 and SA2 levels on the ABS Population Grid
- ranges from 0.0 to 1.0, with higher values indicating larger adverse effects of heatwaves on health
- HHRI values do not represent a direct quantity of risk (for example, a score of 0.4 is not twice as risky as 0.2)
- BCARR's analysis uses HHRI percentiles (for example, top 10%) to identify geographic areas where adverse effects of heatwaves on health are most pronounced.

Population weighted density:

- Population-weighted density (PWD) measures attempt to capture the density at which the average city resident lives. They are an alternative to standard density measures which simply divide the total population by the total land area. The calculation of PWD within this report takes a weighted average of the density of all square kilometre population grid cells in a city, with each cell weighted by its population.

Key data sources used

This table outlines the key data sources used for each chapter of this report.

Table 12: Key data sources used in *State of Australian Cities 2024* report

Goal	Data source
Introduction	Australian Bureau of Statistics (ABS): <ul style="list-style-type: none"> • Regional Population, 2022–2023 (March 2024 release). BCARR: <ul style="list-style-type: none"> • BCARR City Ring Classifications 2021.
Liveable and equitable	Australian Bureau of Statistics (ABS): <ul style="list-style-type: none"> • Regional Population, 2022–2023 (March 2024 release). • Estimates of Aboriginal and Torres Strait Islander Australians, final 2021 Census-based estimates (August 2023 release). • Estimates and Projections, Aboriginal and Torres Strait Islander Australians 2011–2031 (July 2024 release). • Regional Population, 2022–2023 (March 2024 release). • Estimates and Projections, Aboriginal and Torres Strait Islander Australians, 2006–2031 (July 2019 release). • 2021 Census DataPacks—Time Series Profile, SA2, SUA and GCCSA. • Aboriginal and Torres Strait Islander life expectancy 2020–2022 (November 2023 release). • Cultural Diversity: Census (June 2022 release).

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<p>Productive and innovative</p>	<p>Australian Bureau of Statistics (ABS):</p> <ul style="list-style-type: none"> • ABS National Accounts, Australian System of National Accounts, 2022–23 financial year. • Socio-Economic Indexes for Areas (SEIFA), Australia (April 2023 release). • ABS Labour Force, Australia, Detailed (modelled SA4 estimates). • Australian Industry, 2022–2023 (May 2024 release). • Innovation in Australian Business, 2022–2023 (June 2024 release). • Digital Activity in the Australian Economy, 2021–22 (October 2023 release). • Regional Population, 2022–2023 (March 2024 release). <p>BCARR:</p> <ul style="list-style-type: none"> • BCARR Experimental Gross Regional Product estimates for 2015–16 and 2020–21. • BCARR customised Report on Gross Regional Product in 20 Largest Australian Cities, 2020–21 [Data Set]. • BCARR customised Report on Labour Force [Data Set]. • BCARR customised Report on Industry [Data Set]. • BCARR customised Report on Employment in the Cultural Sector [Data Set]. • BCARR customised Report on Tourism [Data Set]. • BCARR customised Report on Education based on ABS Census of Population and Housing [Data Set].

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Sustainable and resilient	<p>Australian Bureau of Statistics (ABS):</p> <ul style="list-style-type: none"> • New houses being built on smaller blocks (June 2022 release). <p>BCARR:</p> <ul style="list-style-type: none"> • BCARR customised Report on Heat-Health Risk [Data Set]. • BCARR customised Report on Density [Data Set]. • BCARR customised Report on Building Energy Efficiency [Data Set]. • BCARR customised Report on Electric Vehicles [Data Set]. <p>National Emergency Management Agency (NEMA):</p> <ul style="list-style-type: none"> • Customised Report on City Disaster Activations and AGDRP/DRA Funding provided between 2013 and 2023 [Data Set].
Secondary cities	<p>Australian Bureau of Statistics (ABS):</p> <ul style="list-style-type: none"> • Regional Population, 2022–2023 (March 2024 release). • Census of Population and Housing. <p>BCARR:</p> <ul style="list-style-type: none"> • BCARR customised Report on Alice Springs and Bunbury case studies [Data Set]. • BCARR customised Report of Population Projections of Emerging Cities [Data Set]. <p>BITRE customised report based on International Merchandise Trade data.</p>

Data limitations and considerations

While this report aims to provide a comprehensive analysis of life in Australia’s largest cities, it is important to acknowledge several limitations and considerations regarding the data used.

Timeliness of Census data:

- The primary data source, the 2021 Census, was conducted 3 years prior to publication.
- However, the full data set became available 2022 and 2023.
- This time lag may not fully reflect current urban conditions, particularly given rapid changes in housing markets, employment patterns and urban development.

COVID-19 impact on 2021 Census data:

- The 2021 Census was conducted during the COVID-19 pandemic, skewing some metrics.
- Data on work patterns, commuting and use of public spaces may not represent typical behaviour.

- For working and commuting patterns, 2016 Census data has been used as a better proxy for typical behaviour.

Geographic unit aggregation:

- Some datasets have been aggregated from smaller geographic units (SA2/3/4 and LGA levels) to larger units (GCCSA or SUA).
- While this allows for comparison between Australia's major cities, it may mask some intra-city variations.

Granularity and local variation:

- While the report aims for national consistency, it may not capture fine-grained local variations.
- State, territory and local government datasets can provide more detailed urban information; however, they were excluded due to a lack of consistent methodology across these state datasets and to maintain national consistency.
- This limitation may result in important local trends or issues specific to particular cities being overlooked.

Private dataset exclusion:

- Many private datasets in the urban space were not included due to lack of transparency and to maintain national consistency.
- This exclusion may result in missing some recent or specialised data that could provide additional insights.

Population projection notes:

- Forecasts for the capital city GCCSAs come from the Centre for Population (Treasury), go up until 2034 and use the 30 June 2022 estimated resident population (ERP) as a base. Because they are all from the same dataset, they can be compared to each other. These forecasts are preferred because of their national consistency and their links to government policy.
- The projections for the non-capital cities and the capital city rings are drawn from the relevant state governments (BCARR analysis of state government data) with varying degrees of currency and different input assumptions. None of the growth rates from these projections should be compared to their relevant capital city because of the different data sources that are used.

Homelessness:

- Lockdown restrictions in place in some cities at the time of the Census made it more difficult to enumerate people sleeping rough and those staying in non-private dwellings.
- For example, people sleeping rough were not enumerated in Greater Sydney and surrounding areas.
- Due to the potential impacts of these enumeration issues on data quality, the report does not separate data into subcategories of homelessness.

Access to services:

- The liveability measures from the Australian Urban Observatory, while comprehensive, may not capture all aspects of urban life quality and may have limitations in data collection methods.

Child care data:

- The child care type data from Household, Income and Labour Dynamic's in Australia (HILDA) is based on a small sample size of fewer than 100 for Perth and Adelaide, and results for these cities should be treated with caution. HILDA data is reported on an unweighted basis.

Cultural activity and participation:

- The Cultural and Creative Activities 2021–22 release was surveyed during the peak of COVID-19 lockdowns. This particularly affected cultural attendance, as many people could not leave their homes. Cultural activity was less affected.

Gross Regional Product (GRP) estimates:

- The GRP estimates involve distributing state-level data to smaller geographic areas, which may introduce some inaccuracies.
- The diverse range of data sources used in this process, while comprehensive, may have varying levels of accuracy and timeliness.

Employment and skills data:

- The ABS labour force estimates methodology are based on the place of usual residence, while respondents may be employed in a different region to where they live.
- This is particularly relevant for regions around capital cities, with workers often travelling across regional boundaries to central business districts, and labour market outcomes are more likely to reflect activity in these areas.

Tourism regions:

- The report uses tourism regions rather than city boundaries. The tourism regions tend to be larger than the cities of interest within this report.
- Some cities have been constructed from multiple tourism regions to more closely reflect their proper boundaries.
- Four of the 20 cities have been excluded from this analysis, as their corresponding tourism regions were deemed unfit for purpose: Wollongong, Albury–Wonda, Ballarat and Toowoomba.
- The industries that contribute to Tourism GVA include Ownership of dwellings. Ownership of dwellings is a large contributor to Tourism GVA, but the tourism component represents only 2.3% of total GVA (in 2019–20). It is difficult to interpret for its contribution to tourism or to regions. Neither ABS nor Tourism Research Australia (TRA) provide any commentary on Ownership of dwellings as part of their Tourism Satellite Account articles.

Cultural and creative industry classification:

- The definition of cultural and creative sector employment, based on the scope of industries used in the 2014 ABS Cultural and Creative Activity Satellite Account, may not fully capture recent changes to estimate the size of the cultural and creative sector.

Night-time economy and labour force data:

- Due to data availability, the most recent updates to night-time economy and labour force data could not be included in this report.
- This may result in slightly outdated information in these specific areas.

National Emergency Management Agency (NEMA) dataset:

- NEMA collects data at the LGA level for disasters.
- For this report, the LGA-level values for disasters have been aggregated into their corresponding GCCSA and SUA.
- However, the correspondence between LGAs and GCCSA/SUA boundaries is not perfectly aligned, so in some instances certain LGAs could not be included for specific cities. Additionally, the amount of LGAs included in this data set (109) are less than the total amount of LGAs for the 20 cities (154) that generally correspond to GCCSA/SUA boundaries:

- This may result in a skewed representation of the number of internal LGA disaster activations and total AGDRP/DRA granted within the 20 cities.

HHRI interpretation:

- The HHRI does not represent absolute risk quantities, making direct numerical comparisons between areas potentially misleading.
- The analysis focuses on percentiles rather than absolute values, which may not fully capture the nuances of heat vulnerability across different urban contexts.

Commercial building energy efficiency ratings:

- For analysis of NABERS data, a sample size of at least 10 offices was required for office energy ratings and emissions. This screen was applied to ensure averages and other metrics could be accurate and not skewed by outliers. Ballarat, Bendigo, Toowoomba, Sunshine Coast, Albury–Wodonga and Launceston were the 6 cities excluded.
- NABERS rating schemes provide metrics for water and waste efficiency for new office buildings, but these were not analysed in this report.

Housing affordability measures:

- While internationally recognised, the dwelling price to income ratio may not account for all factors affecting housing affordability, such as interest rates or local market conditions.

By acknowledging these limitations, we aim to provide a transparent foundation for interpreting the findings presented in this report. Users of this data should consider these constraints when drawing conclusions or making policy decisions based on the information provided. Future iterations of this report will strive to address these limitations where possible, potentially incorporating more recent data, additional local insights and evolving methodologies in urban analysis.

Glossary

Infill development: Development on land that has been previously developed. Existing infrastructure generally already exists in these areas.

Greenfield development: Development on previously undeveloped land, usually rezoned agricultural land with a need for new infrastructure in the area.

Brownfield development: Usually infill development on previously industrial or commercial land.

City ring classifications: City ring classifications have been used by the Bureau of Communications, Arts and Regional Research (BCARR) and the Bureau of Infrastructure and Transport Research Economics (BITRE) for 10 years:

- **Inner-city ring areas** include central business districts and neighbouring suburbs. They are typically characterised by higher population density and high access to employment, services, infrastructure, public transport and amenities. Inner-city ring areas also have a large daily flow of commuters from middle-city ring and outer-urban suburbs.
- **Middle-city ring areas** typically have lower density than inner-city ring areas but often have high-density precincts around public transport hubs. Compared to inner-city ring areas, they have more limited access to employment, services, infrastructure, public transport and amenities. Many people from outer-urban suburbs commute to middle-city ring suburbs or transit through them to inner-city ring areas for work and to access services.
- **Outer-city ring areas** are the outermost areas of a city. They typically include established urban suburbs, newly developing greenfield suburbs and surrounding rural areas. They are often characterised by less access to infrastructure, public transport and services. They have a high dependency on other regions for jobs.

Commute distance: A calculation of the distance in kilometres between a person's place of usual residence and place of work.³³⁷

Greater Capital City Statistical Area (GCCSA): Geographic boundaries that define the functional area of Australian capital cities. GCCSAs include people who regularly socialise, shop or work within the city but live in the towns and rural areas surrounding the capital city.³³⁸

Major urban areas (MUA): Areas with populations of more than 10,000 people.³³⁹

Separate house: A house that is separated from other dwellings by at least half a metre.³⁴⁰

Significant Urban Area (SUA): Groups of urban centres that contain populations of 10,000 or more.³⁴¹ This definition is used for non-capital cities.

Statistical Area 2/3/4: A geographic definition that groups areas of cities and other population centres based on a range of factors including connectivity and community interaction:

- SA2s are generally the size of 1–2 suburbs within large cities.³⁴²
- SA3s are built from a number of SA2s.³⁴³
- SA4s are built from a number of SA3s.³⁴⁴

Urban areas: Areas with populations of more than 1,000 people.³⁴⁵

Urban localities: Centres with populations of more than 200 people.³⁴⁶

This report focuses on Australia's major cities:

- These cities are based on the 2022 boundaries that meet the ABS MUA definition of a minimum of 100,000 people or have been included in a previous State of Australian Cities report.
- These populations are then assessed against the ABS greater capital city statistical areas (capital cities) or significant urban areas (other cities).

First Nations terminology and data limitations

This report includes data about First Nations populations. First Nations people are people who identify as Aboriginal and/or Torres Strait Islander. Different terminology is used in different datasets. For example:

- the ABS use the term Indigenous people
- the Closing the Gap report refers to Aboriginal or Torres Strait Islander people.

For consistency, the terms 'First Nations people' and 'Aboriginal and Torres Strait Islander people' are used throughout this report. However, it is acknowledged that these terms represent a great diversity of nations and people.

First Nations population and proportion are based on the ABS's GCCSA and SUA boundaries in the major cities. As a result, the distribution of First Nations people may vary slightly from other reports that use different geographic definitions.

BCARR city rings

Figure 58: Ring classification for Sydney, 2021

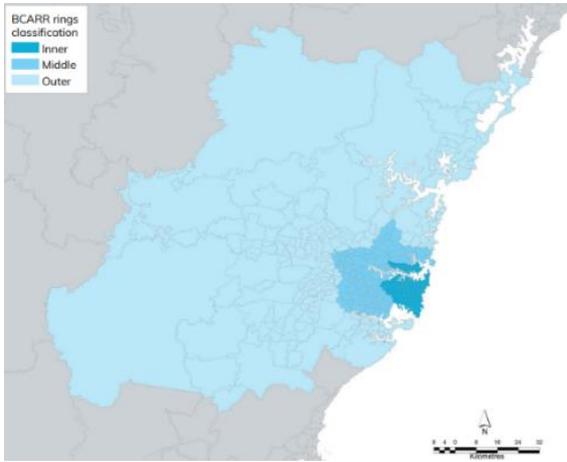


Figure 59: Ring classification for Melbourne, 2021

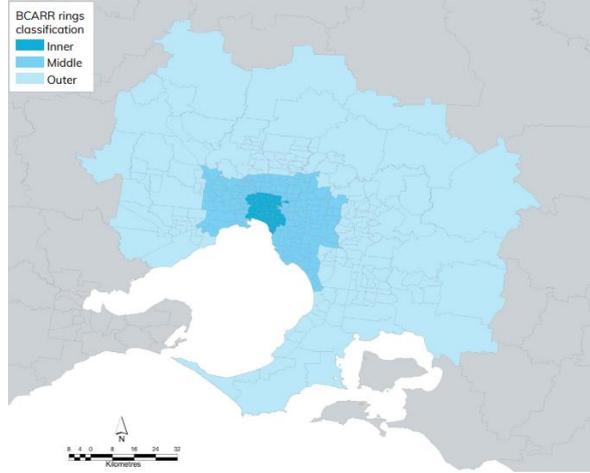


Figure 60: Ring classification for Brisbane, 2021

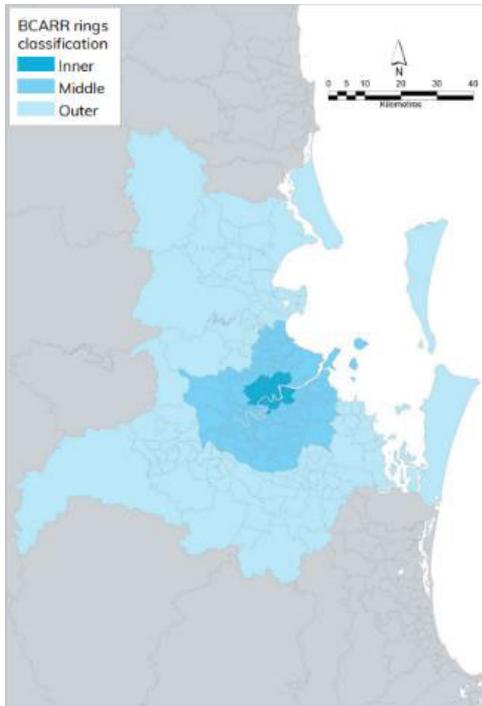


Figure 61: Ring classification for Perth, 2021

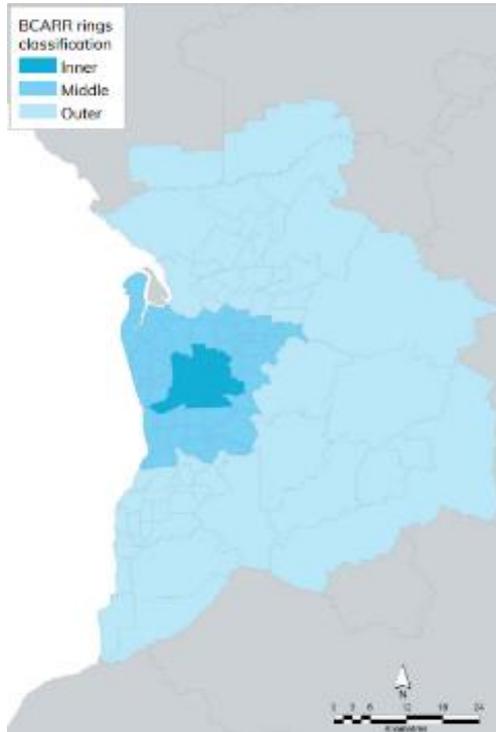
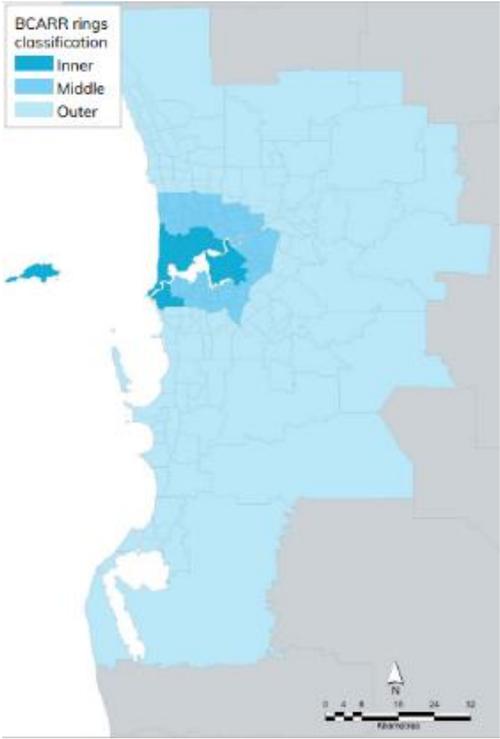


Figure 62: Ring classification for Adelaide, 2021



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Australian Government
The Treasury



Meeting Brief

MB25-001219

FOR INFORMATION - Meeting brief - Council of Capital City Mayors - 6 November 2025

TO: Minister for Housing, Minister for Homelessness, Minister for Cities - The Hon Clare O'Neil MP



Urban Policy Forum (UPF)



If asked: status of the State of the Australian Cities Report (SoAC).

- Any decision on the publication or the frequency of the report is a matter for Government.

