

Unboxing Australia's Relocation of the Nation

The Muval Index 2021



 muval



Welcome to Australia's Moving Index

Since government restrictions began in March 2020, there have been over one million searches for 'moving house' COVID related questions. In turn, the home removals industry is challenged to keep up with demand.


As a search engine for reliable removalists, Muval has been able to use its data as an early indicator of net migration figures released by the Australian Bureau of Statistics. So much so, Muval is collaborating with The University of Queensland on modelling to predict behaviours and patterns of internal migration within Australia. During recent lockdowns in Melbourne and Sydney, we have seen spikes in searches for residents looking to move home.

To unbox the 'relocation of the nation', we commissioned a national survey of 1,000 adults representative of Australia's population. The findings shine a light on how transient Australian adults are compared to years gone by (and there is no sign of this slowing). The survey results looked at Australians' property and financial goals, why they move and how they move.

Whilst exploring the trends of downsizing cities, we hear from the Lord Mayor of Adelaide and learn about the expats returning to the South Australian capital city - which has no intention of competing with its East Coast rival cities for population growth. We also spoke to founder and CEO of domestic violence charity RizeUp, Nicolle Edwards, to better understand the impact of the pandemic on women moving to escape violence in their home. Home Organisation expert Erin Boyce, founder of Your Organised Life who runs sell-out online declutter bootcamps, shares her tips to packing (and decluttering in the process).

Whilst international borders remain closed, the shape of the nation within Australia is changing at a pace we haven't seen before. This paper helps shed light on our Australian way of life moving forward.

Sincerely,



James Morrell
Co-Founder, Muval

Relocation of the Nation

Regional Australia continues to boom as record numbers of Aussies move from capital cities to smaller towns and communities.

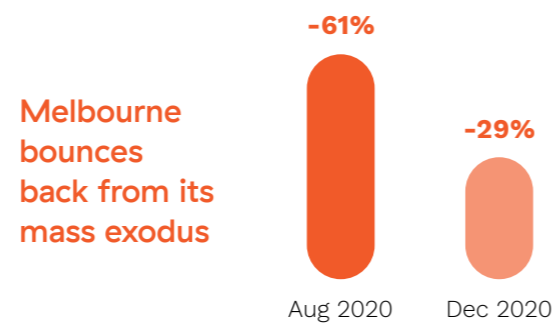
Regional Australia continues to boom as record numbers of Aussies move from capital cities to smaller towns and communities where there are more jobs available than ever before. It's also younger people - families and millennials - who are making the move to regions, often made possible by working from home conditions in what would traditionally be city based roles.

A survey of 1,000 adults¹ in Australia's capital cities by the Regional Australia Institute (RAI) found that one in five residents are considering a move to the regions and more than two-thirds of those considering the move would make the leap in the next 12 months.

Real time data from removalist search engine Muval has mirrored the quarterly migration data from the Australian Bureau of Statistics. The University of Queensland is adopting the data in new modelling to predict what Australian cities and regions will look like in the years and decades to come.

In the year ending 30 June 2021, Muval found that Melbourne continued to bounce back from its mass exodus during the prolonged lockdown. Negative migration went as low as -29% compared to its peak in August 2020 (-61%). However, during recent lockdowns there was a resurgence of people looking to move out of Melbourne with negative net migration rising back to -46%

Brisbane ended the financial year with the highest level of growth in net migration at 96[^] and highest % of inbound searches out of all cities across Australia at 25%



Melbourne bounces back from its mass exodus



1. Survey conducted in December 2020

We asked Lord Mayor of Brisbane Adrian Schrinner why so many people have moved to the Sunshine State's capital city:

"The rise in the number of interstate residents moving to Brisbane is a testament not just to our fantastic way of life, but the way we've responded to the challenges of the coronavirus pandemic". He concedes the city is continuing to see the effects of the pandemic on its public transport network, CBD and local businesses. The Brisbane City Council are undergoing a range of initiatives to bring back commuters, support businesses and draw crowds back to the city centre.

The data shows a continued departure of residents from Sydney in search of better house prices and lifestyles elsewhere. In the year ending 30 June 2021, there were -35% migration to the city highlighting more people moving out than moving in.

Tasmania's housing crisis is reflected in the data too with nearly three times the number of people enquiring on Muval about moving to Hobart versus moving out. Over recent months, the total number of Tasmanian enquiries now superseded those of people looking to move to Adelaide.

The data is supported by the most recent ABS data in the quarter ending December 2020, capital cities had a net loss of 10,600 people compared to pre-pandemic 2019 where just 3,800 city folk relocated to regional Australia.



Positives v negatives of migration trends Dr Elin Charles-Edwards of The University of Queensland

Dr Elin Charles-Edwards, **Senior Lecturer in Human Geography at The University Queensland** says that thanks to the internet, there's more data capturing human behaviour than ever before. Charles-Edwards is part of a team using big data to 'nowcast' internal migration. Her latest work looks at how Australians are relocating and whether these recent trends will stick as we slowly emerge from the pandemic.

Of the latest net migration trends, she says "decentralisation of Australia's population away from cities to regional Australia has been a longstanding government policy objective.

"Since March 2020, the pandemic has expedited what decades of decentralisation policy has aimed to achieve namely Australians migrating internally to regional areas.

"The potential positives to decentralisation include lower congestion in cities and economic growth in regional Australia. The challenge of increased demand for housing and services in regional areas includes preserving the very lifestyle that makes regional Australia attractive in the first place."



'Freelocations' to drive further relocation of the nation

In the weeks following the end of JobKeeper, 30,600 people lost their jobs immediately despite the overall unemployment rate dropping to 5.5 percent in the ABS April data. In the same period, Muval saw an increase in enquiries for people moving into Sydney and Melbourne.

Since Melbourne's snap two week lockdown in early June, there's been over 100,000 online searches for 'can I move during lockdown?'. Since COVID restrictions began in March 2020, there have been over 1.1 million searches for 'moving house' COVID related questions on the internet.

This could be a trend we see continue into the future whilst a 'tug of war' for skilled workers evolves between regional and city locations evident by RAI's 'Move to More' campaign and government grants to pay for relocation costs of job seekers.

"Government grants up for grabs include \$3,000 for workers who relocate to a capital city and \$6,000 to move to a regional area. Approved visa holders can receive \$2,000 and an extra \$3,000 is up for grabs for relocating with a dependent to regional areas. The funds can be used to cover costs such as removalists, temporary accommodation and travel," says Morrell.

Following the end of Jobkeeper, Muval saw a sharp spike in people finding their website through search terms such as 'relocation assistance' and 'government relocation assistance'.

In addition, States and Territories have their own activities to entice workers to regional jobs. On 21 May, the Queensland Government announced a \$7.5 million plan to lure workers to tourism jobs in regional areas. From 1 July, job seekers can access a \$1,500 bonus and \$250 in travel vouchers should they relocate north of Mackay or west of Toowoomba.

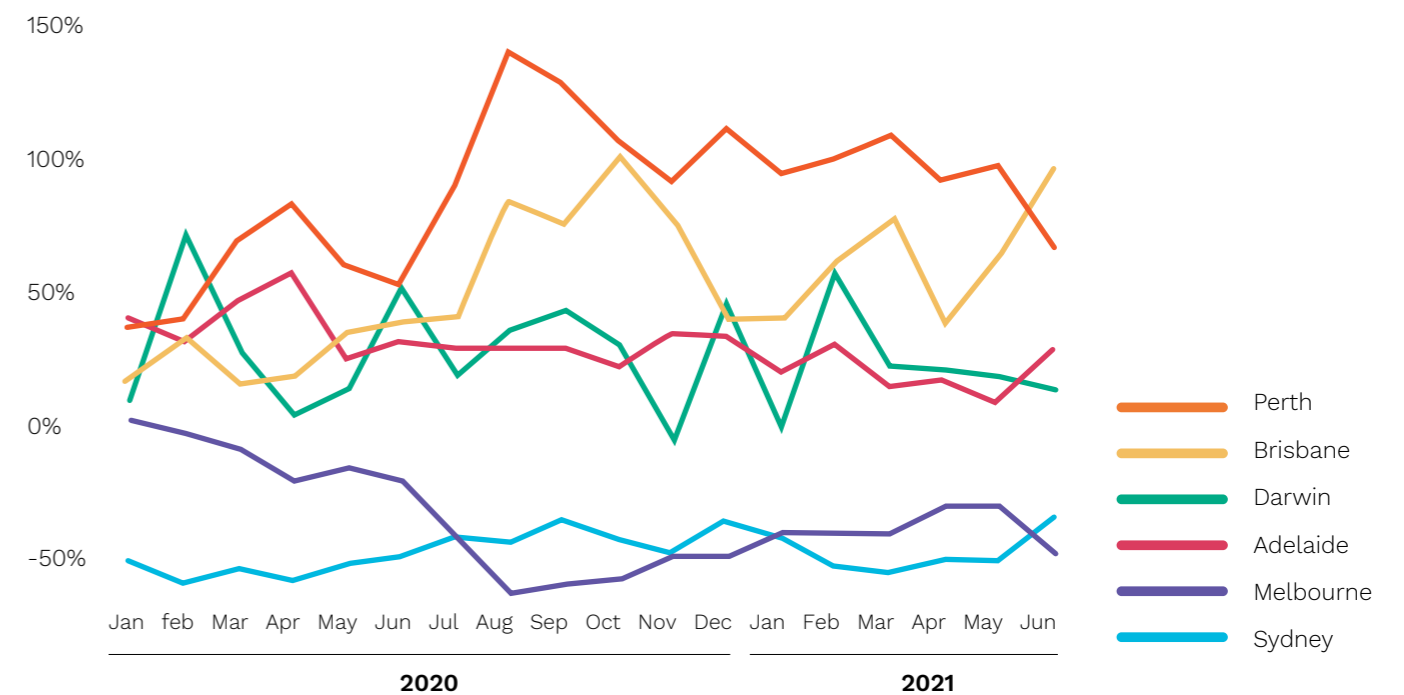
The new survey, commissioned by Muval, found 45% of Aussies would move for a new job in a different location. Most likely music to the ears of politicians who have invested heavily into these schemes, says Morrell who, whilst supportive of the concept, had some criticism of the \$1,500 Queensland incentive.

"With the average cost of moving from Brisbane to Cairns for a 3 bedroom family house being approximately \$3,000, the incentive likely won't lure families and couples who have a lot more to move. It could make a real difference to a single person who can take advantage of 'backloading' where you literally purchase space on a truck with other movers," said Morrell.

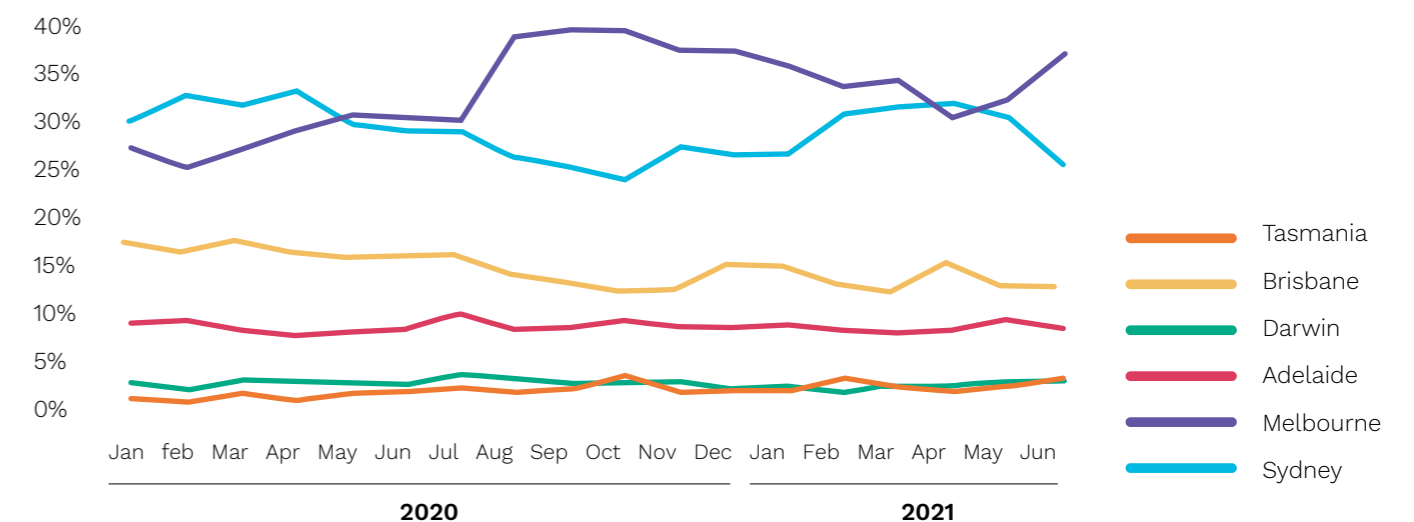


Migration Timeline

Interstate Enquires / Net Migrations

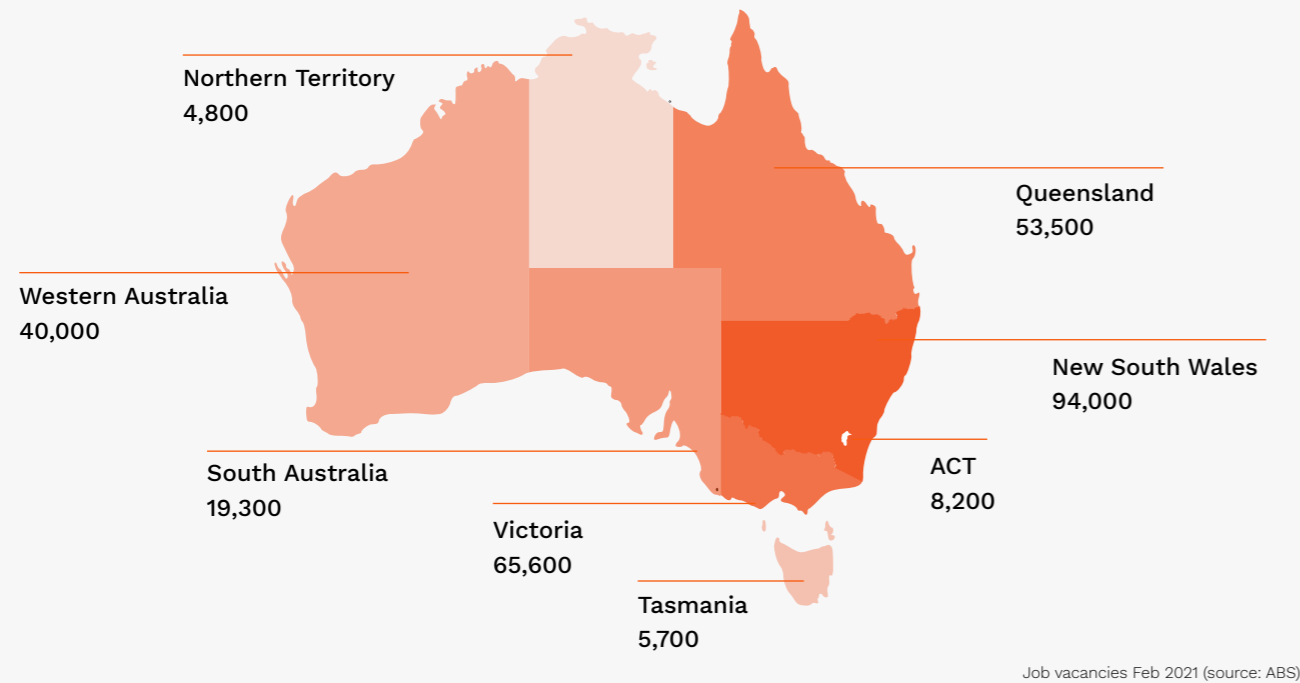


Percentage of Outbound enquires per city



Where the jobs are?

At its worst, job vacancies were cut around half in Victoria (-51.9%), NSW (-49.9%), Tasmania (-45.7%), Queensland (-34.3%) in the quarter ending May 2020.



Australia's Hottest Suburbs

Of course the big shift in people moving more isn't always interstate or city to regional. According to removalist enquiries on Muval, these are the hottest suburbs for people moving within them and to them from other locations.

QLD	NSW and ACT	VIC	WA
Southport	Surry Hills	South Yarra	Scarborough
West End	Belconnen	Brunswick	Rockingham
Newstead	Parramatta	Richmond	Baldivis
Newfarm	Paddington	Southbank	Fremantle
Maroochydore	Braddon	Carlton	Canning Vale
South Brisbane	Newtown	St Kilda	Dianella
Surfers Paradise	Alexandria	Fitzroy	South Perth
Robina	Darlinghurst	Brunswick East	Morely
Mango Hill	Glebe	Point Cook	Subiaco
Buderim	Waterloo and Byron Bay (tied)	Docklands	Bayswater

The Great Australian dream just got more ambitious

When asked about property and financial goals, younger Aussies are the most ambitious with their property and financial goals.

The survey found that nearly equal amounts of Australians want to own their own home (40%) as well as be a landlord (38%) providing further proof of Aussies aspiring to invest into property.

When asked about property and financial goals, younger Aussies are most ambitious with their property and financial goals with 44% of 18-24 year olds and 47% of 25-34 year olds wanting to be home owners and landlords - compared to just 23% of 55-64 year olds.

Queenslanders are most interested in being home owners and landlords (with the exception of ACT) - with 44% aiming to invest in property compared to 36% of NSW and 38% of Victorians.

The survey found that 40% of Australians would like to own their own home. This was highest in South Australia (47%) compared to the Northern Territory (22%). Nearly a third of renters (28%) are content renting without the burden of a mortgage.

The rising popularity of Airbnb and Stayz has led nearly 20% of Australians to have a goal of owning their own home plus a holiday rental.

Just two in 10 Australians are working towards having paid off their mortgage by the time they retire. Of those who already have a mortgage, three in ten are aiming to pay it off before retirement.

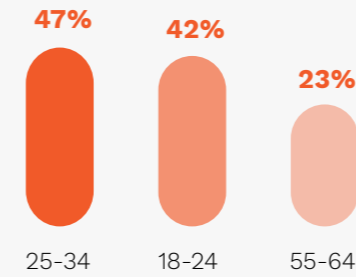
Morrell says the research is interesting to the removalist sector, which is booming thanks to record internal migration, as it shines a light on behaviours and patterns of its customers.

“There is so much movement in the property sector and that has a multiplier effect by increasing demand for removalists, professional packers, cleaners, home organisers and search engines like ours,” he said.

Morrell also called out for removalists to join the growing boom ‘runs’ to regional areas as the search engine tries to keep up with demand.

Ayman Issa, Founder of removalist company Quick and Easy says the high demand coupled with border closures have meant filling removalist jobs has been challenging: “Demand for removalists dropped off in March to May 2020 and once lockdown was lifted nationally, we have seen more demand than we have in the previous few years.

“With increased demand, we have been able to hire admin staff for office jobs some of which were made redundant from the tourism industry and are well suited to the removals sector. The jobs on the road that require heavy lifting are harder to fill as traditionally, the sector has relied on international students and backpackers,” he added.



Australians wanting to be home owners and landlords



Queenslanders are most interested in being home owners and landlords compared to NSW and Victorians.

South Australia has the highest rate of people who would like to own their own home compared to the Northern Territory.

20%



Two in 10 Australians are working towards having paid off their mortgage by the time they retire.

3 in 10

Of those who already have a mortgage, three in ten are aiming to pay it off before retirement.

Nation of movers

The forever home is no longer

Regional Australia continues to boom as record numbers of Aussies move from capital cities to smaller towns and communities.

The latest Census data showed Aussies move house more often than ever before and a new national survey in May 2021 revealed 72% of Aussies believe the trend will definitely or probably continue.

“We are more transient than ever before. Migration within Australia was already high pre March 2020 and the pandemic has ignited exponential growth,” says Morrell whose online removal search engine Muval has boomed since the pandemic began.

Research by RAI also shows movers were drawn to the benefits of regional living versus escaping city life. The top three reasons for moving to regional Australia were: a sense of space (77%), connecting with the natural environment (77%) and overall improved wellbeing (75%).

Whilst the benefits to regional living were the driving force, the top three reasons for driving people out of cities were avoiding traffic congestion (70%), reducing general stress and anxiety (69%) and reducing the cost of living (68%).

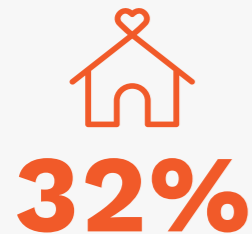
The May 2021 national survey looked into what prompts people to move house more broadly (not only to regional Australia), and found:

A change is as good as a holiday

Proving change is as good as a holiday, **nearly half (46%) of Aussies would move house for a change of scene.**

- Women are more likely to move house for a change of scene than men (49% vs 44%)
- 81% of 65+ year olds would relocate for a change of scene compared to 42% of 18-24 year olds
- Territorians are the most open to moving for a change of scene (56%) compared to Victorians (46%), NSW residents (45%), Queenslanders (49%), South Australians (48%).

The things we do for love



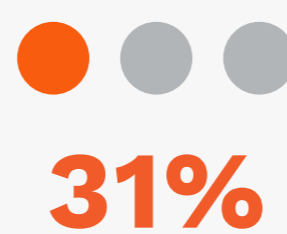
A third of Aussies would move for love, with 32% of the population confessing they would be happy to relocate to move in with a partner.

Downgrading to get on the ladder



The survey found 38% of renters would move to downgrade to a cheaper house compared to 28% of homeowners who already have a mortgage.

The importance of school catchment



A third (31%) of Aussies would move house to live closer to better schools for their children and/or future children.

When moving home means escaping a dangerous situation

Nicolle Edwards is the CEO of domestic and family violence charity RizeUp who provides groundbreaking add-value support right across Australia to specialist domestic violence services that work with women and children fleeing violence. Since March 2020, demand for RizeUp's services have increased by 28% and the charity has supported nearly 1,500 families. To put this into perspective, the charity supported 930 families in its first five years of operation (and pre-pandemic).

“Sadly, the pandemic has resulted in a spike in the number of women – and their families – looking to escape violence in their homes. So much so, our charity, which offers a range of programs helping high-risk women and their children, is struggling to keep up with demand,” said Edwards.

“RizeUp Australia’s primary focus is to reduce the incidence of domestic and family violence in Australia. At a practical level, we support families impacted by violence by helping them on their journey from violence to safety,” she added.

To do this, RizeUp has created an innovative solution that brings communities together, increases volunteering and makes real, far reaching and practical contributions to these vulnerable families. As a family leaves refuge, RizeUp furnishes their new accommodation with everything they need to make it a home, so they can make a fresh start. They also support affected children by providing everything they need to happily settle into a new school.



Interview with Lord Mayor of Adelaide Sandy Verschoor

Adelaide welcomes returning expats as Aussies see value in city downsizing

One Australian capital city benefiting from the trend of 'city downsizing' is Adelaide, which saw the city of churches experience the largest net migration gain in the December 2020 quarter since 1991 (according to ABS data). Muval has seen searches for **people moving to Adelaide continue to stay higher than people moving out delivering an average 29% positive net migration over the last year ending 30 June 2021.**

Lord Mayor of Adelaide Sandy Verschoor says expats from overseas and across Australia have been drawn back to the city thanks partly to its green spaces and central parklands that have taken on a new importance during lockdowns over the past 16 months. She says locals, and returning expats, have rediscovered Adelaide parklands in the pandemic including its walking tracks, dog parks and a place for reflection.

“The pandemic has brought work and lifestyle balance into focus and Adelaide has benefited from that. The city is consistently rated in the top 10 cities in the world to live thanks in part to how safe it is to live here,” said Verschoor.

She says Adelaide doesn't compete with Sydney, Melbourne, Brisbane and has no desire to be a mega-city by world standards. Rather, the council and federal government are investing into two major infrastructure projects, growth of the creative sectors and the city's festival season in a COVID safe capacity.

In the most recent employment data, **South Australia fared well having created 15,300 new jobs in the month of April 2021,** shrugging off the end of JobKeeper. **Wage growth in April was up 4.2 per cent compared to pre-COVID levels.**



Our love, hate relationship with moving

Whilst the research shows Aussies are happy to up and move, the actual process of moving can be a slog. In fact, according to the research, the most loathed parts of moving are packing, cleaning, unpacking, searching and booking a removalist.

“The fact these tasks were all ranked nearly equally as loathed activities, it shows how incredibly stressful moving can be,” said Morrell.

Whilst packing tasks were ranked closely in terms of how loathed they are, packing was the worst with 63% of Aussies ranking it in their top three most loathed tasks to do when moving house.

Women (34%) hate packing over men (28%) but when it comes to setting up home providers like electricity and gas, more men (18%) loathe that task than women (13%).

A good excuse for a spring clean

When asked what order Aussies tackle their moves, the survey found people start packing first. This allows them time to declutter and work out exactly what they need to move from A to B, before they commit to a removalist, says home organisation expert Erin Boyce, founder of Your Organised Life who runs sell-out online declutter bootcamps.

The survey found most Australians tackle the task of moving home in the following order:

1. Packing
2. Research a removalist and get quotes
3. Book the removalist
4. Set up power and gas at the new house
5. Redirect mail and organise the internet


Men hate setting up providers over Women


Women hate packing over Men

63% 63% of Aussies rank packing in their top three most loathed tasks to do when moving house.

Erin's expert tips

for decluttering and moving

1

Start early! The minute you decide or are required to move, begin packing to avoid feeling overwhelmed later down the track. Start with the items you will not need to use before the move - think photo albums and frames, festive decorations if it's not coming up before the move and seasonal clothing that's not in use. The sooner you get started the better.

2

To **save time and money**, use your towels and linens to wrap fragile items like dishes and server ware. This will avoid the need for bubble wrap and also mean you've packed two things at once!

3

Declutter as you pack. As a rule of thumb, if you didn't use it in the current home chances are you won't need it in the new one so take the time to declutter these items before packing. A great starting point is paperwork - with less emotional stress involved, it's easy to bin old bank statements and receipts. Also consider digitising your future paperwork before you move out, to help eliminate the need for filing cabinets and storage space in your new home.

4

Get measuring. Try and get a floor plan of the new space (with measurements where possible) and map out where your furniture will go. It's important to understand the limitations of the new property and make sure there's a spot for all the things you take, parting ways with the rest. Nothing is worse than realising your couch doesn't fit in the new house the day you move in!

5

Keep the necessities handy. Pack an essentials box of all the things you'll need quick access to on move day. Things like the remote, some money so you can grab a quick coffee or lunch, a small tool kit to assist with building beds. If you have young kids, an activity pack with snacks will help keep them occupied while you try and unpack the house.



Erin Boyce
Founder of Your Organised Life

Decisions, decisions

Moving house is also a time when Aussies rethink their home providers

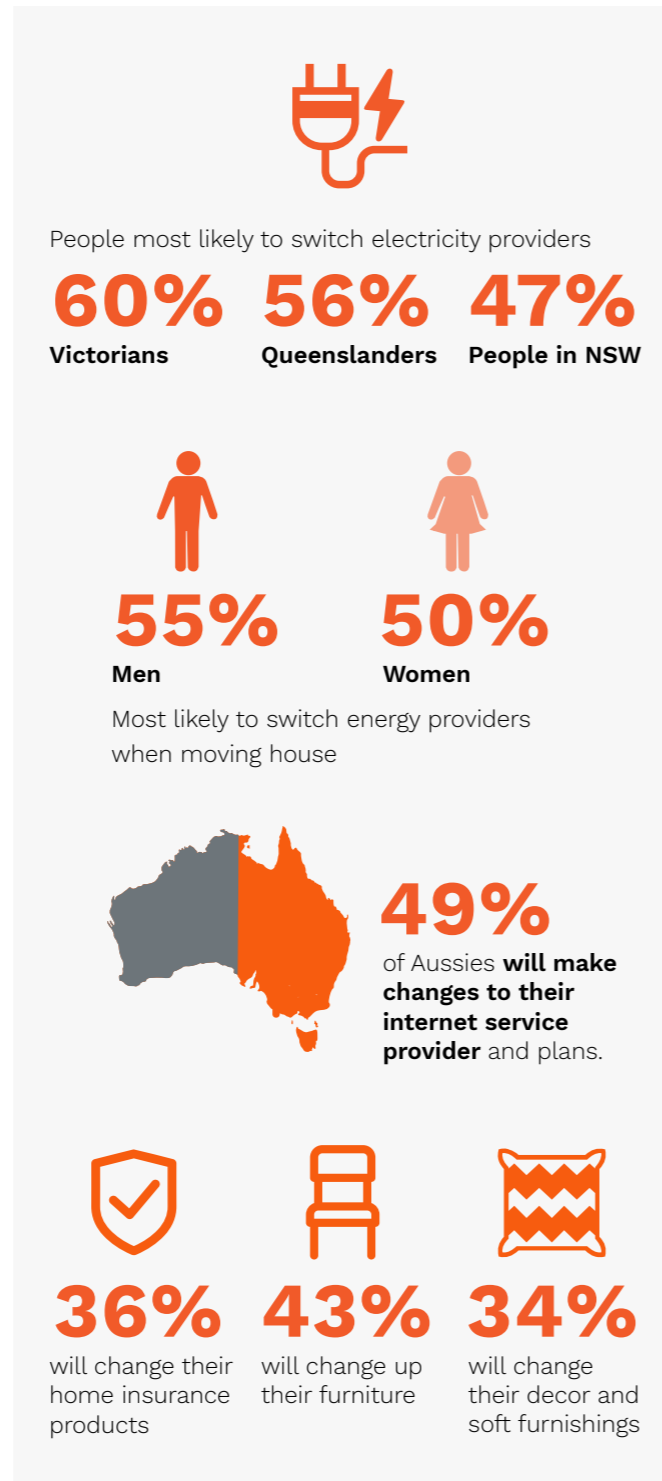
Moving house is also a time when Aussies rethink their home providers with nearly a third of people say they're likely to change their home loan product when moving house and over half said they would change their electricity and/or gas service and products. With 2.5 million home moves made a year in Australia, that's 833,333 switches to different electricity and/or gas providers on moves alone.



A third of people say they're **likely to change their home loan product** when moving house



Over half said they would **change their electricity and/or gas service** and products.



Which mover are you?

Morell and his team help thousands of people move each year and have seen it all - from relocating helicopters to indoor plants. One of Morrell's team members Brittany acts as a 'move concierge' often helping people find and book the right removalist for their situation.

"I get calls from people who are stressed to the max about their move whilst they're also trying to juggle work and/or family. One client recently was moving from Sydney to Brisbane and frantically reached out to us for help. We were able to sort out his move whilst he was in a meeting," she says.

According to Brittany, there are four types of movers – which are you?



The Mega Planner

Spreadsheets are your best friend. You plan your move meticulously with each room colour coded between Excel and the dot stickers on your boxes. You don't rely on mates to rock up, you plan ahead with a reliable removalist.



The Hoarder

Over the years, you have accumulated a scary amount of 'stuff' making moving overwhelming. Not sure where to start, you have to call in a friend or family member to supervise the packing process ensuring some items are sent to the closest charity shop (or it will never happen...).



Last Minute Maniac

You work better under pressure leaving the move to the last minute thinking 'she'll be right'. You're most likely to rope your mates into helping you move for a case of beer and a sausage sizzle at the end of an exhausting day.



The Serial Mover

Here today, gone tomorrow. You move locations easily and know what you're doing when it comes to move time. You know better than to accumulate too much stuff and don't get overly sentimental about the things you do have.



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