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Yearbook 2019

Progress in Australian Regions



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Foreword



This is the sixth edition of the *Progress in Australian Regions – Yearbook*.

This edition provides updated information on previous Yearbooks (where available), to provide a consistent measure of progress in Australia's regions over time.

This data will be available on both the Australian Government data site (data.gov.au) and the Bureau of Infrastructure, Transport and Regional Economics website (bitre.gov.au), to provide easy access – including data by additional geographical scales that are not published in this book. We anticipate this will be a useful tool for those analysing change at different regional scales.

We trust that this edition continues to be of value to regional stakeholders around the country, and we encourage you to provide any feedback via email at Regional.Progress@infrastructure.gov.au

Gary Dolman

Head of Bureau Bureau of Infrastructure, Transport and Regional Economics

December 2019



Contents

Foreword		111
Introduction		1
The frame	work	1
Progress	s indicators	1
Contextu	ual indicators	2
Geographi	c and regional variation	5
Remoter	ness classes	6
Major ur	ban areas	7
Capital o	city and balance of state	8
Sub-stat	e regions	g
Reading th	ne tables	12
Data quali	ty and availability	13
Data qua	ality	13
Data gap	os	13
Regiona	l data	14
Online a	ccess	14
For furth	er development	14
Progress		15
	Society	
_	alth and wellbeing	
	Life expectancy at birth	
P 1.1.2	Psychological distress	
P 1.1.3		
P 1.1.4	Overweight or obese	
P 1.1.5	Physical activity	
P 1.1.6	Smoking rates	
P 1 2 Cla	ose relationships	
	Children developmentally vulnerable due to physical health and wellbeing	
	Me	
P 1.3.1 P 1.3.2	Homelessness	
P 1.3.2 P 1.3.3	Overcrowded conditions	
P 1.3.3	Recognising traditional country	
	fety	
	Victims of physical assault	
	Victims of malicious property damage	
P 1.4.3	Road fatalities	62

P 1.5 Learning and knowledge	65
P 1.5.1 Vocational or higher educational qualifications	65
P 1.5.2 Year 5 and 9 reading standards	70
P 1.5.3 Year 5 and 9 numeracy standards	71
P 1.6 Community connections	73
P 1.6.1 Voluntary work	73
P 1.7 Fair opportunity	78
P 1.7.1 Equivalised disposable household income for low and middle income households	78
P 1.8 Enriched lives	83
P 1.8.1 Unpaid help	83
P 1.8.2 Attendance at cultural venues and events	85
Progress 2: Economy	87
P 2.1 Opportunities	88
P 2.1.1 Having a qualification or working in a skilled occupation	88
P 2.1.2 Young people earning or learning	93
P 2.1.3 Net business entry rate	98
P 2.2 Jobs	103
P 2.2.1 Employed persons	103
P 2.2.2 Unemployment rate	107
P 2.2.3 Youth unemployment rate	111
P 2.3 A resilient economy	115
P 2.3.1 Proportion of unemployed persons unemployed for 12 months or more	
P 2.3.2 Labour force underutilisation rate	117
P 2.3.3 Value of new building approvals	121
P 2.4 Enhanced living standards	126
P 2.4.1 Real median weekly household income	126
P 2.4.2 Real mean household net worth	
P 2.4.3 Labour force participation	135
P 2.5 Fair outcomes	139
P 2.5.1 Inequality in household income	139
P 2.6 International economic engagement	145
P 2.6.1 International visits to residents ratio	145
Progress 3: Environment	149
P 3.1 Healthy natural environment	150
P 3.1.1 Air pollution	150
P 3.2 Appreciating the environment	151
P 3.2.1 Domestic trips involving nature activities	151
P 3.3 Protecting the environment	155
P 3.3.1 Protected areas of land	155
P 3.4 Sustaining the environment	160
P 3.4.1 Greenhouse gas emissions	

DOF III	Alle to the second of	4.00
	althy built environments	
	Average commuting time	
P 3.5.2	Active travel	
P 3.5.3	Number of solar panel systems	174
Progress 4:	Governance	179
P 4.1 Tru	st	180
P 4.1.1	Generalised trust	180
P 4.1.2	Informal votes	182
P 4.2 Pa	rticipation	183
	Voter turnout	
	Participation in a civic or political group	
	Uptake of Australian citizenship	
	три то	
Context		191
Context 1: P	opulation and Demographics	193
C 1.1 Po	pulation	194
C 1.1.1	Estimated resident population	194
C 1.1.2	Population projections	199
C 1.1.3	Internal migration	203
C 1.1.4	Overseas arrivals	206
C 1.1.5	Aboriginal and Torres Strait Islander people	211
C 1 2 Ag	e structure	216
_	Age profile	
	Proportion of people who are working age	
	using	
	Average household size	
C 1.3.1		
C 1.3.3	Residential property prices	
	Dwelling approvals	
C 1.4 So	cial characteristics	
C 1.4.1	People who speak a language other than English at home	
C 1.4.2	People on selected pensions or allowances	
C 1.4.3	Single parent families	256
Context 2: T	ransport and Infrastructure	261
C 2.1 Mc	oving people	262
C 2.1.1	Transport mode for journey to work	262
C 2.1.2	Passengers through airports	274
C 2.1.3	Dwellings with no motor vehicle	276
C 2.1.4	Kilometres travelled by passenger vehicles	281
C 2.1.5	Road speed performance	282
C 2.2 Mc	oving freight	283
	Road freight activity	
	Volume of freight through ports	
	Value of international freight through ports	287

	288
C 2.3.1 Dwellings with an internet co	onnection
C 2.3.2 Residential water supply	293
C 2.4 Land use	294
C 2.4.1 Land area and land use	294
Context 3: Industry and Innovation	299
C 3.1 Industry	300
C 3.1.1 Top employing industry	300
C 3.1.2 Main growth and decline inc	ustry310
C 3.1.3 Structural change index	317
C 3.2 Business activity	321
C 3.2.1 Actively trading businesses	321
	326
C 3.3 Innovation	331
C 3.3.1 Employment in knowledge-ir	tensive service industries331
Abbreviations and acronyms	335
	336
Keterences	337

List of tables

Table 1	Indicator framework	3
Table 2	Indicators updated in the 2019 Yearbook	4
Table 3	Statistical geographic areas used to define Australia's major urban areas	7
Table 4	List of sub-state regions based on 2016 ASGS	11
Table 5	Example table with guidance for interpretation	13
Table P 1.1.1.a	Life expectancy at birth by sub-state region	19
Table P 1.1.2.a	Adults with high or very high levels of psychological distress by remoteness class	22
Table P 1.1.2.b	Adults with high or very high levels of psychological distress by capital city/balance of state	23
Table P 1.1.3.a	Suicide rate by capital city/balance of state	25
Table P 1.1.4.a	Adults who are overweight or obese by remoteness class	26
Table P 1.1.4.b	Adults who are overweight or obese by major urban area	27
Table P 1.1.4.c	Adults who are overweight or obese by sub-state region	28
Table P 1.1.5.a	Adults who met physical activity guidelines by remoteness class	31
Table P 1.1.5.b	Adults who met physical activity guidelines by major urban area	32
Table P 1.1.5.c	Adults who met physical activity guidelines by sub-state region	33
Table P 1.1.6.a	Adults who are current daily smokers by remoteness class	36
Table P 1.1.6.b	Adults who are current daily smokers by major urban area	37
Table P 1.1.6.c	Adults who are current daily smokers by sub-state region	38
Table P 1.2.1.a	Children who are developmentally vulnerable due to their physical health and wellbeing by remoteness class	41
Table P 1.3.1.a	Homelessness by remoteness class	42
Table P 1.3.1.b	Homelessness by major urban area	43
Table P 1.3.1.c	Homelessness by sub-state region	44
Table P 1.3.2.a	Houses with overcrowded conditions by remoteness class	47
Table P 1.3.2.b	Houses with overcrowded conditions by major urban area	48
Table P 1.3.2.c	Houses with overcrowded conditions by sub-state region	49
Table P 1.3.3.a	Households that own their own home (with or without a mortgage) by remoteness class	52
Table P 1.3.3.b	Households that own their own home (with or without a mortgage) by major urban area .	53
Table P 1.3.3.c	Households that own their own home (with or without a mortgage) by sub-state region	54
Table P 1.3.4.a	Aboriginal and Torres Strait Islander people who recognise an area as homelands or traditional country by remoteness class	57
Table P 1.4.1.a	Victims of physical assault by remoteness class	58
Table P 1.4.1.b	Victims of physical assault by capital city/balance of state	59
Table P 1.4.2.a	Victims of malicious property damage by remoteness class	60
Table P 1.4.2.b	Victims of malicious property damage by capital city/balance of state	61
Table P 1.4.3.a	Road fatalities by remoteness class	62
Table P 1.4.3.b	Road fatalities by capital city/balance of state	64
Table P 1.5.1.a	People with a vocational or higher education qualification by remoteness class	65
Table P 1.5.1.b	People with a vocational or higher education qualification by major urban area	66
Table P 1.5.1.c	People with a vocational or higher education qualification by sub-state region	67
Table P 1.5.2.a	Students at or above national minimum reading standards by remoteness class	70
Table P 1.5.3.a	Students at or above national minimum numeracy standards by remoteness class	72
Table P 1.6.1.a	People who do voluntary work through an organisation or group by remoteness class	73

Table P 1.6.1.b	People who do voluntary work through an organisation or group by major urban area	74
Table P 1.6.1.c	People who do voluntary work through an organisation or group by sub-state region	75
Table P 1.7.1.a	Equivalised disposable household income for low and middle income households by remoteness class	78
Table P 1.7.1.b	Equivalised disposable household income for low and middle income households by s state region	
Table P 1.8.1.a	People who provided unpaid help to others living outside the household by remoteness class	83
Table P 1.8.1.b	People who provided unpaid help to others living outside the household by capital city/balance of state	84
Table P 1.8.2.a	Attendance rate for cultural venues and events by capital city/balance of state	86
Table P 2.1.1.a	People with a Certificate III or above, or employed in a skilled occupation by remoteness class	88
Table P 2.1.1.b	People with a Certificate III or above, or employed in a skilled occupation by major urban area	89
Table P 2.1.1.c	People with a Certificate III or above, or employed in a skilled occupation by sub-state region	90
Table P 2.1.2.a	People aged 15-24 years who are earning or learning by remoteness class	93
Table P 2.1.2.b	People aged 15-24 years who are earning or learning by major urban area	94
Table P 2.1.2.c	People aged 15-24 years who are earning or learning by sub-state region	95
Table P 2.1.3.a	Net business entry rate by remoteness class	98
Table P 2.1.3.b	Net business entry rate by major urban area	99
Table P 2.1.3.c	Net business entry rate by sub-state region	.100
Table P 2.2.1.a	Employed persons by sub-state region	.104
Table P 2.2.2.a	Unemployment rate by sub-state region	.108
Table P 2.2.3.a	Youth unemployment rate by sub-state region	.112
Table P 2.3.1.a	Proportion of unemployed persons unemployed for 12 months or more by capital city/balance of state	.116
Table P 2.3.2.a	Labour force underutilisation rate by sub-state region	.118
Table P 2.3.3.a	Value of new building approvals by remoteness class	.121
Table P 2.3.3.b	Value of new building approvals by major urban area	.122
Table P 2.3.3.c	Value of new building approvals by sub-state region	.123
Table P 2.4.1.a	Real median weekly household income by remoteness class	.126
Table P 2.4.1.b	Real median weekly household income by major urban area	.127
Table P 2.4.1.c	Real median weekly household income by sub-state region	.128
Table P 2.4.2.a	Real mean household net worth by remoteness class	.131
Table P 2.4.2.b	Real mean household net worth by sub-state region	.132
Table P 2.4.3.a	Labour force participation rate by sub-state region	.136
Table P 2.5.1.a	Ratio of household income for low income households to median income households by remoteness class	.139
Table P 2.5.1.b	Ratio of household income for low income households to median income households by major urban area	.140
Table P 2.5.1.c	Ratio of household income for low income households to median income households by sub-state region	.142
Table P 2.6.1.a	International visits by sub-state region	.146
Table P 3.1.1.a	Air pollution	.150
Table P 3.2.1.a	Domestic visits involving nature activities by sub-state region	.152
Table P 3.3.1.a	Protected areas of land by remoteness class	.155
Table P 3.3.1.b	Protected areas of land by major urban area	.156

Table P 3.3.1.c	Protected areas of land by sub-state region	157
Table P 3.4.1.a	Greenhouse gas emissions per capita by major urban area	161
Table P 3.5.1.a	Average commuting time by remoteness class	162
Table P 3.5.1.b	Average commuting time by capital city/balance of state	163
Table P 3.5.2.a	Active travel by bicycle or walking by remoteness class	164
Table P 3.5.2.b	Active travel by bicycle or walking by major urban area	166
Table P 3.5.2.c	Active travel by bicycle or walking by sub-state region	168
Table P 3.5.3.a	Number of small scale solar panel systems and solar water heater installations	
	by remoteness class	174
Table P 3.5.3.b	Number of small scale solar panel systems and solar water heater installations by major urban area	175
Table P 3.5.3.c	Number of small scale solar panel systems and solar water heater installations by sub-state region	176
Table P 4.1.1.a	Levels of generalised trust by remoteness class	180
Table P 4.1.1.b	Levels of generalised trust by capital city/balance of state	181
Table P 4.1.2.a	Informal votes in Australian federal elections by remoteness	182
Table P 4.2.1.a	Voter turnout at federal elections by remoteness	183
Table P 4.2.2.a	People who have actively participated in a civic or political group in the last 12 months by remoteness class	184
Table P 4.2.2.b	People who have actively participated in a civic or political group in the last 12 months by capital city/balance of state	185
Table P 4.2.3.a	Uptake of Australian citizenship by remoteness class	186
Table P 4.2.3.b	Uptake of Australian citizenship by major urban area	187
Table P 4.2.3.c	Uptake of Australian citizenship by sub-state region	188
Table C 1.1.1.a	Estimated resident population by remoteness class	194
Table C 1.1.1.b	Estimated resident population by major urban area	195
Table C 1.1.1.c	Estimated resident population by sub-state region	196
Table C 1.1.2.a	Population projections by remoteness class	199
Table C 1.1.2.b	Population projections by sub-state region	200
Table C 1.1.3.a	Internal migration matrix by remoteness class	203
Table C 1.1.3.b	Internal migration by sub-state region	204
Table C 1.1.4.a	Number of overseas born recent arrivals by remoteness class	206
Table C 1.1.4.b	Number of overseas born recent arrivals by major urban area	207
Table C 1.1.4.c	Number of overseas born recent arrivals by sub-state region	208
Table C 1.1.5.a	Aboriginal and Torres Strait Islander people by remoteness class	211
Table C 1.1.5.b	Aboriginal and Torres Strait Islander people by major urban area	212
Table C 1.1.5.c	Aboriginal and Torres Strait Islander people by sub-state region	213
Table C 1.2.1.a	Age profile by remoteness class	216
Table C 1.2.1.b	Age profile by major urban area	217
Table C 1.2.1.c	Age profile by sub-state region	218
Table C 1.2.2.a	Proportion of people who are working age by remoteness class	221
Table C 1.2.2.b	Proportion of people who are working age by major urban area	222
Table C 1.2.2.c	Proportion of people who are working age by sub-state region	223
Table C 1.3.1.a	Average household size by remoteness class	226
Table C 1.3.1.b	Average household size by major urban area	227
Table C 1.3.1.c	Average household size by sub-state region	228
Table C 1.3.2.a	Multi-unit dwellings by remoteness class	231
Table C 1.3.2.b	Multi-unit dwellings by major urban area	232

Table C 1.3.2.c	Multi-unit dwellings by sub-state region	233
Table C 1.3.3.a	Average residential property prices by major urban area	237
Table C 1.3.3.b	Average residential property prices by sub-state region	238
Table C 1.3.4.a	Total number of dwelling approvals by remoteness class	243
Table C 1.3.4.b	Total number of dwelling approvals by major urban area	243
Table C 1.3.4.c	Total number of dwelling approvals by sub-state region	244
Table C 1.4.1.a	People who speak a language other than English at home by remoteness class	247
Table C 1.4.1.b	People who speak a language other than English at home by major urban area	248
Table C 1.4.1.c	People who speak a language other than English at home by sub-state region	249
Table C 1.4.2.a	Ratio of the number of people on selected pensions/allowances by remoteness class	252
Table C 1.4.2.b	Ratio of the number of people on selected pensions/allowances by sub-state region .	253
Table C 1.4.3.a	Proportion of families that are single parent by remoteness class	256
Table C 1.4.3.b	Proportion of families that are single parent by major urban area	256
Table C 1.4.3.c	Proportion of families that are single parent by sub-state region	257
Table C 2.1.1.a	Transport mode shares for journey to work by remoteness class	262
Table C 2.1.1.b	Transport mode shares for journey to work by major urban area	263
Table C 2.1.1.c	Transport mode shares for journey to work by sub-state region	265
Table C 2.1.2.a	Number of passengers through top 50 airports	275
Table C 2.1.3.a	Dwellings with no motor vehicle by remoteness class	276
Table C 2.1.3.b	Dwellings with no motor vehicle by major urban area	277
Table C 2.1.3.c	Dwellings with no motor vehicle by sub-state region	278
Table C 2.1.4.a	Passenger vehicle kilometres travelled (on road) by capital city/balance of state	281
Table C 2.1.5.a	Road speed performance by major urban area	282
Table C 2.2.1.a	Road freight tonne kilometres by capital city/balance of state	283
Table C 2.2.2.a	Volume of freight through top 49 ports	285
Table C 2.2.3.a	Value of international freight through top 30 ports	287
Table C 2.3.1.a	Dwellings with an internet connection by remoteness class	288
Table C 2.3.1.b	Dwellings with an internet connection by major urban area	289
Table C 2.3.1.c	Dwellings with an internet connection by sub-state region	290
Table C 2.3.2.a	Average annual residential water supplied by major urban area	293
Table C 2.4.1.a	Land area and land use by remoteness class	294
Table C 2.4.1.b	Land area and land use by major urban area	295
Table C 2.4.1.c	Land area and land use by sub-state region	296
Table C 3.1.1.a	Top employing industry by sub-state region	301
Table C 3.1.2.a	Main growth and decline industries by sub-state region	311
Table C 3.1.3.a	Structural change index by sub-state region	318
Table C 3.2.1.a	Actively trading businesses by remoteness class	321
Table C 3.2.1.b	Actively trading businesses by major urban area	322
Table C 3.2.1.c	Actively trading businesses by sub-state region	323
Table C 3.2.2.a	Business size by remoteness class	326
Table C 3.2.2.b	Business size by major urban area	327
Table C 3.2.2.c	Business size by sub-state region	328
Table C 3.3.1.a	Employment in knowledge-intensive industries by sub-state region	332

List of figures

Figure 1	Remoteness classes, 2016 Australian Statistical Geography Standard (ASGS)	.6
Figure 2	Major urban areas – Greater Capital City Statistical Areas (GCCSA) and Significant Urban Areas (SUA)	.8
Figure 3	Sub-state regions – Greater Capital City Statistical Areas and Statistical Areas Level 3 (in Outback areas) and Level 4, 2016 ASGS	.9



Introduction



The 2019 Yearbook is the sixth in a series designed to answer the question of how our regions are progressing against social, economic, environmental and governance indicators. This information enables governments, private investors and the community to identify important trends. Understanding these trends is particularly important when making decisions in relation to infrastructure needs and government services, as both are influenced by the geographic distribution of people, economic activity and natural resources. This edition builds on previous Yearbooks by updating data sources wherever possible.

The framework

The information in this Yearbook is organised according to a framework that groups indicators into domains corresponding to different aspects of socio-economic progress (Table 1). This approach builds on a framework that was originally developed by the Australian Bureau of Statistics (ABS) for the *Measures of Australia's Progress* (MAP) publication¹. The MAP framework has been adjusted to incorporate data sources which are available across a wide range of geographies. It has also been extended to include contextual indicators that are not related to progress, but which are nonetheless important for forming a well-rounded understanding of the characteristics of each region.

Progress indicators

Most of the indicators in this Yearbook are based on the concept of societal progress. Progress is about improvements in the wellbeing of people and households over time. This requires looking beyond the economy of a region to include the wider range of people's experiences and living conditions.²

Internationally, measuring wellbeing and progress of societies forms part of the process of understanding countries and regions. Projects like the Commission on the Measurement of Economic Performance and Social Progress³ and the Organisation for Economic Co-operation and Development (OECD) Global Project on Measuring the Progress of Societies have highlighted the importance of broader measures of economic, environmental, and social sustainability. Multilateral agencies have developed methods for comparing the progress of different nations, including the UN Human Development Index⁴, the OECD Better Life Index⁵ and the related OECD Regional Well-Being initiative⁶.

The ABS has measured progress at the national scale in its MAP publication. The themes measured by MAP were selected through extensive national consultation to identify what Australians considered most important to them for national progress. In the Yearbook the MAP themes are examined at a regional scale uncovering the variation in rates of progress below the national level.

OECD 2013, Measuring Well-Being and Progress, Paris.

ABS 2013, Measures of Australia's Progress (cat. no. 1370.0), Canberra.

³ Stiglitz, Sen and Fitoussi 2009, Report of the Commission on the Measurement of Economic Performance and Social Progress.

⁴ United Nations Development Programme (UNDP) 2014, Human Development Report 2014: Sustaining Human Progress: Reducing Vulnerabilities and Building Resilience.

OECD n.d., Better Life Index, Paris.

⁶ OECD n.d., Regional Well-Being, Paris.

When measuring progress at a regional level, this Yearbook seeks to answer the question:

"Is life in your region getting better?"

Rather than make comparisons between regions, the information on progress in this Yearbook can be used to consider how individual regions are doing over time, and if these changes are in line with the broader national trend.

The concept of progress is multidimensional and a range of indicators have been selected to show whether progress is being made across four domains. The Progress section of the Yearbook has been divided into four sections (Table 1), each focusing on one of the four domains of progress:

- · Part P.1, Society;
- · Part P.2, Economy;
- · Part P.3, Environment; and
- · Part P.4. Governance.

Each domain consists of a set of themes, reflecting the aspirations that Australians have for their nation. Each theme is represented by one or more *progress indicators* (Table 1), which are summary statistics that signal whether that aspect of life is moving in a 'good' direction (progress) or a 'bad' direction (regress) (Box 1).

Many of the progress indicators in this Yearbook have been adapted directly from MAP. Some indicators use the same data source as the relevant MAP indicator. For other indicators, the MAP data source could only provide information at the national or state level, and not at the more detailed geographic level required to provide acceptable regional coverage. In these cases, the MAP data source has been replaced in favour of related data sources which provide information on the same concept but at a more detailed geographic level.

In addition, some themes from MAP are based on indicators that are not available below the national or state level. These themes represent gaps in the regional evidence base. However each year, the Yearbook attempts to fill these gaps.

Contextual indicators

The Yearbook provides an overview of how Australia's regions are progressing over time. While the main focus is on progress, these indicators have also been supplemented with *contextual indicators* that provide background information to help interpret changes in a region.

The contextual indicators part of the Yearbook has been divided into three sections (Table 1), each focusing on one of three contextual domains:

- Part C.1, Population and Demographics;
- · Part C.2, Transport and Infrastructure; and
- Part C.3, Industry and Innovation.

Like the progress indicators, each domain consists of a set of themes that are represented by one or more statistical indicators.

Table 2 presents those indicators that have been updated for the 2019 Yearbook.

Table 1 Indicator framework

	Progress Indicators		Contextual Indicators	
JS	Society	Economy	Population and Demographics	Transport and Infrastructure
giol	Health and wellbeing	Opportunities	Population	Moving people
e Re	Close relationships	Jobs	Age structure	Moving freight
Stat	Home	A resilient economy	Housing	Communications
-dns	Safety	Enhanced living	Social characteristics	and utilities
as,	Learning and knowledge	standards		Land use
Are	Community connections	Fair outcomes		
rbar	Fair opportunities	International economic engagement		
or U	Enriched lives			
Classes, Major Urban Areas, Sub-State Regions	Environment	Governance	Industry and Innovation	
lass	Healthy natural	Trust	Industry	
SS (environment	Participation	Business activity	
otene	Appreciating the environment		Innovation	
Regions – Remoteness	Protecting the environment			
	Sustaining the environment			
R	Healthy built environments			

Source: Adapted from ABS 2013, Measures of Australia's Progress (cat. no. 1370.0), Canberra.

Box 1 Some key terms

Statistical indicators are measures that provide users with a summary of the state of play with respect to a topic. For example, median income is a statistical indicator that provides an easily interpreted summary measure of the distribution of income in a region. This would otherwise be a detailed set of data items relating to the number of people in different income groups.

Progress indicators are a particular type of statistical indicator. Progress indicators are chosen on the basis that most people would agree that an increase (or decrease) in the indicator can be unambiguously associated with either progress or regress. For example, *life expectancy* is a commonly used indicator of progress in the theme of Health and Wellbeing. An increase in *life expectancy* is directly related to progress in the health of people living in the region.

In comparison, *population growth* does not qualify as a progress indicator, as there is considerable disagreement as to whether population growth in a region represents progress.

Table 2 Indicators updated in the 2019 Yearbook

Update indicators	Table number	Nature of update
	Society	
Life expectancy at birth	P 1.1.1	Complete update
Psychological distress	P 1.1.2	Complete update
Suicide rate	P 1.1.3	Complete update
Overweight or obese	P 1.1.4	Complete update
Physical activity	P 1.1.5	Complete update
Smoking rates	P 1.1.6	Complete update
Children developmentally vulnerable due to physical health and wellbeing	P 1.2.1	Complete update
Victims of physical assault	P 1.4.1	Complete update
Victims of malicious property damage	P 1.4.2	Complete update
Road fatalities	P 1.4.3	Complete update
Year 5 and 9 reading standards	P 1.5.2	Complete update
Year 5 and 9 numeracy standards	P 1.5.3	Complete update
Disposable household income for low and middle income households	P 1.7.1	Complete update
Attendance at cultural venues and events	P 1.8.2	Complete update
	Economy	
Net business entry rate	P 2.1.3	Complete update
Employed persons	P 2.2.1	Complete update
Unemployment rate	P 2.2.2	Complete update
Youth unemployment rate	P 2.2.3	Complete update
Proportion of unemployed persons unemployed for 12 months or more	P 2.3.1	Complete update
Labour force underutilisation rate	P 2.3.2	Complete update
Value of new building approvals	P 2.3.3	Complete update
Real mean household net worth	P 2.4.2	Complete update
Labour force participation	P 2.4.3	Complete update
International visits to resident ratio	P 2.6.1	Complete update
	Environment	
Air pollution	P 3.1.1	Definition update
Domestic trips involving nature activities	P 3.2.1	Complete update
Greenhouse gas emissions	P 3.4.1	Definition update
Average commuting time	P 3.5.1	Complete update
Number of solar panel systems	P 3.5.3	Complete update
Informaci	Governance	Complete wedst
Informal votes	P 4.1.2	Complete update
Voter turnout	P 4.2.1	Complete update

(continued)

Indicators updated in the 2019 Yearbook (continued)

Update indicators	Table number	Nature of update				
Population and Demographics						
Estimated resident population	C 1.1.1	Complete update				
Population projections	C 1.1.2	Complete update				
Age profile	C 1.2.1	Complete update				
Proportion of people who are working age	C 1.2.2	Complete update				
Residential property prices	C 1.3.3	Complete update				
Dwelling approvals	C 1.3.4	Complete update				
People on selected pensions or allowances	C 1.4.2	Complete update				
Transport and Infrastructure						
Passengers through airports	C 2.1.2	Complete update				
Kilometres travelled by passenger vehicles	C 2.1.4	Complete update				
Road speed performance	C 2.1.5	Defintion update				
Road freight activity	C 2.2.1	Complete update				
Volume of freight through ports	C 2.2.2	Complete update				
Value of international freight through ports	C 2.2.3	Complete update				
Residential water supply	C 2.3.2	Complete update				
Industry and Innovation						
Top employing industry	C 3.1.1	Complete update				
Main growth and decline industry	C 3.1.2	Complete update				
Structural change index	C 3.1.3	Complete update				
Actively trading businesses	C 3.2.1	Complete update				
Business size	C 3.2.2	Complete update				
Employment in knowledge-intensive industries	C 3.3.1	Complete update				

Geographic and regional variation

A statistical geography is a system for organising data according to location. Statistical geographies divide a large geographic area (such as a country) into smaller geographic areas. The smaller areas can then be grouped together in different combinations to represent regions of interest.

The indicators in this Yearbook are viewed through a geographic lens providing the ability to track the progress of regions at several scales. For the most part, the Yearbook uses the geographic classification in the ABS 2016 Australian Statistical Geography Standard (ASGS) to define the boundaries of the statistical regions presented.

Where available, each indicator has been compiled at the following geographic scales:

- Remoteness classes;
- Major urban areas;
- · Capital city and balance of state; and
- · Sub-state regions.

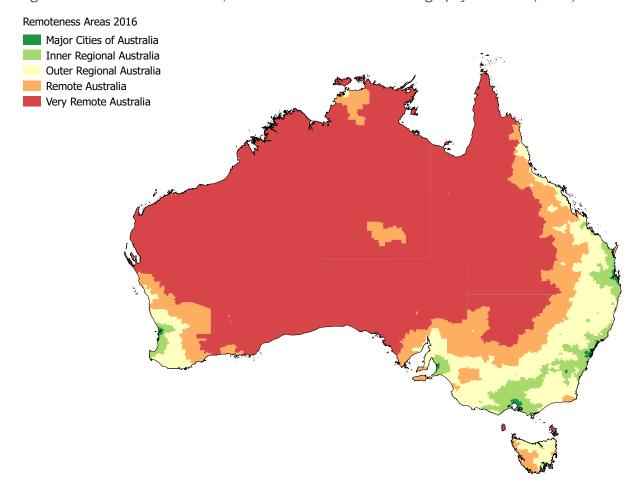
Remoteness classes

The remoteness classes are from the ABS Remoteness Area classification, which divides Australia into five classes based on relative access to services (Figure 1). This classification enables comparisons of how outcomes vary between large regions that share common characteristics of remoteness. These remoteness classes are:

- · Major cities of Australia;
- Inner regional Australia;
- · Outer regional Australia;
- · Remote Australia; and
- · Very remote Australia.

As examples, Dubbo (NSW) and Bunbury (WA) are in Inner Regional Australia, Darwin (NT) and Port Pirie (SA) are in Outer Regional Australia, and Christmas Island, the Cocos (Keeling) Islands and Norfolk Island are in Very Remote Australia.

Figure 1 Remoteness classes, 2016 Australian Statistical Geography Standard (ASGS)



Source: ABS 2018, Australian Statistical Geography Standard (ASGS): Volume 5 – Remoteness Structure, July 2016 (cat. no. 1270.0.55.005)

Major urban areas

The major urban areas (MUA) of Australia are identified as the large urban cores and surrounding built-up urban areas with a population of more than 85,000 residents in 2016 (Figure 2). Throughout the Yearbook the major urban areas are presented in order of population, with the most populated areas at the top of the tables and the least populated areas at the bottom. In total, Australia's 20 largest cities have been included in the Yearbook (Table 3).

Table 3 Statistical geographic areas used to define Australia's major urban areas

Greater Capital City Statistical Areas (GCCSAs)	Significant Urban Areas (SUAs)	
Greater Sydney	Gold Coast - Tweed Heads	Cairns
Greater Melbourne	Newcastle - Maitland	Toowoomba
Greater Brisbane	Canberra - Queanbeyan	Ballarat
Greater Perth	Sunshine Coast	Bendigo
Greater Adelaide	Wollongong	Albury - Wodonga
Greater Hobart	Geelong	Launceston
Greater Darwin	Townsville	

Source: ABS 2017, Australian Statistical Geography Standard (ASGS): Volume 4 - Significant Urban Areas, Urban Centres and Localities, Section of State, July 2016 (cat. no. 1270.0.55.004); and ABS 2016, Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016 (cat. no. 1270.0.55.001)

For the seven capital cities (excluding Canberra), the ABS-defined Greater Capital City Statistical Areas (GCCSAs) have been used to represent the major urban area. These regions represent the functional socio-economic extent of each of the state and territory capitals. The boundaries cover people who regularly socialise, shop or work within each city, including those who live in small towns and rural areas surrounding the city.

The remaining 13 major urban areas are based on the ABS-defined Significant Urban Areas (SUAs). SUA regions are concentrations of urban development with a population of 10,000 people or greater, which include a dense urban core and some surrounding hinterland. SUAs do not represent the functional labour market zone of a major city, as many people who live outside the urban area may still travel to work inside the urban area.

Canberra has been defined by the SUA of Canberra - Queanbeyan, which crosses the New South Wales and Australian Capital Territory border and so includes a wider urban extent than the GCCSA of the ACT. While Canberra is still a capital city, the SUA used to define the major urban area of Canberra - Queanbeyan is a better approximation of the wider urban core that crosses the state border. Similarly two other SUAs cross state boundaries: the Gold Coast - Tweed Heads SUA crosses the Queensland and New South Wales border; and the SUA of Albury-Wodonga crosses the New South Wales and Victoria border.

In some cases the names of major urban areas are the same as those for the larger sub-state regions in which they are located (see sub-state regions below). For example, the major urban area of Cairns is located within the sub-state region of the same name. In these cases the major urban area is always smaller than the wider sub-state region, which often includes a significant amount of the surrounding hinterland.

⁷ Note that while major urban areas are not themselves an ABS geography they were developed using existing ABS geographies.

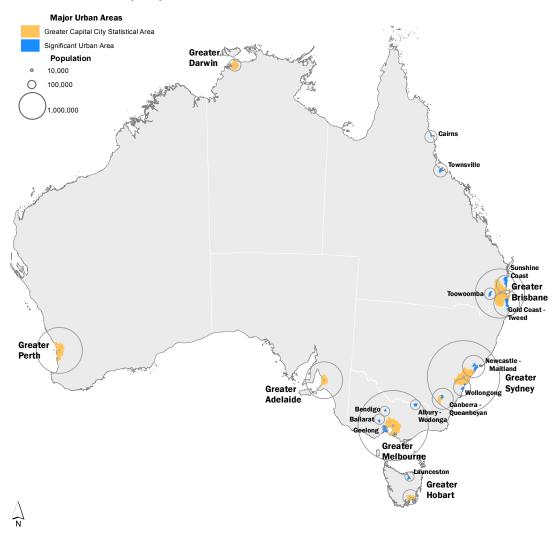


Figure 2 Major urban areas – Greater Capital City Statistical Areas (GCCSA) and Significant Urban Areas (SUA)

Source: ABS 2017, Australian Statistical Geography Standard (ASGS): Volume 4 - Significant Urban Areas, Urban Centres and Localities, Section of State, July 2016 (cat. no. 1270.0.55.004); and ABS 2016, Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016 (cat. no. 1270.0.55.001)

Capital city and balance of state

For some of the indicators, data for remoteness classes or major urban areas is unavailable. In these cases the indicator is presented for the capital city and balance of the state (using the ABS' GCCSA geography). Each state is divided into the region which represents the socio-economic extent of each of the eight state and territory capital cities and the regions that represent the remaining area of the state or territory. These capital cities are equivalent to the capital cities defined under the previously discussed major urban areas geography – both are based on the ABS' GCCSA geography. However, the geography for the GCCSA based Australian Capital Territory is different to the boundary of the SUA-based Canberra - Queanbeyan geography which is used under the major urban areas geography. An aggregate figure for all capital cities and all rest of state areas is provided where data is presented for capital cities and the balance of state. Aggregate figures for Australian capital cities includes data for the Australian Capital Territory.

Sub-state regions

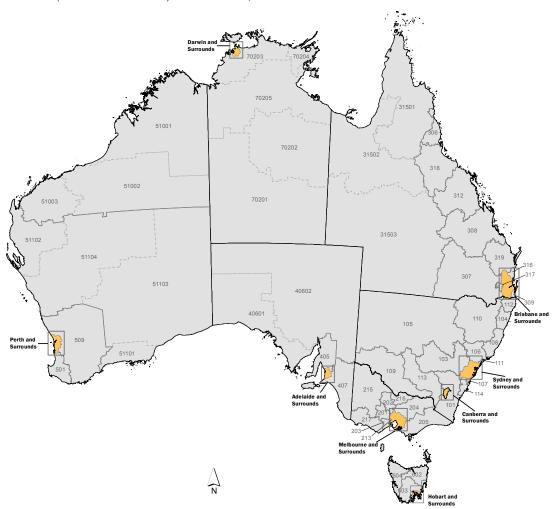
The sub-state regions in the Yearbook are geographic areas within the states and territories (Figure 3). Statistical Areas Level 4 (SA4s) are informed by labour market catchment areas, the population of the region, state and territory boundaries and sample design of the ABS Labour Force Survey.

These regions have a minimum population of 100,000, with some exceptions for sparsely populated remote areas. In regional areas, SA4s tend to have populations closer to the minimum (100,000 - 300,000). In metropolitan areas, SA4s tend to have larger populations (300,000 - 500,000).

The sub-state regions aggregate to the capital cities and the balance of the states (the GCCSA classification). For example, the GCCSA of Greater Sydney is made up of 15 SA4s and the remaining 13 SA4s in New South Wales make up the balance of the state.

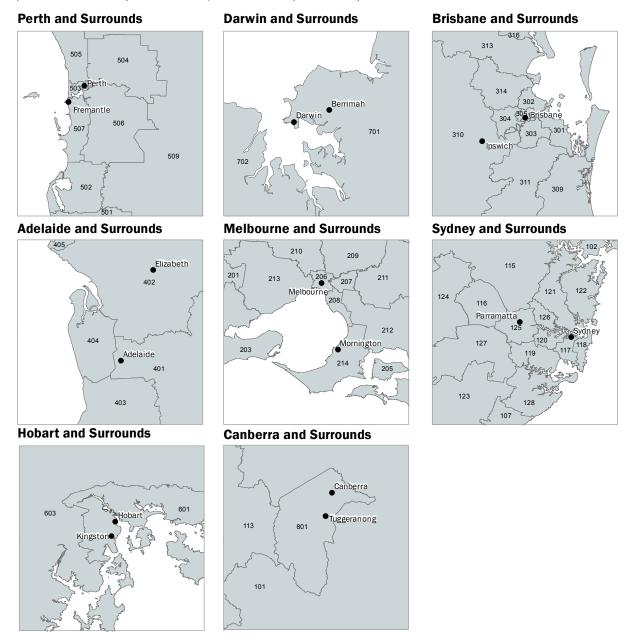
In addition, based on user feedback, since 2016 the Yearbook has included data for Statistical Areas Level 3 (SA3s), where available, for outback regions in Queensland, South Australia, Western Australia and the Northern Territory within the data tables for sub-state regions. The SA3s provide an indication of the variation within these sub-state regions. However, because only selected SA3s have been included in the tables, they are not considered in the discussions in the accompanying text, for example in relation to the largest changes.

Figure 3 Sub-state regions – Greater Capital City Statistical Areas and Statistical Areas Level 3 (in Outback areas) and Level 4, 2016 ASGS



Source: ABS 2016, Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016 (cat. no. 1270.0.55.001)

Sub-state regions – Greater Capital City Statistical Areas and Statistical Areas Level 3 (in Outback areas) and Level 4, 2016 ASGS (continued)



Source: ABS 2016, Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016 (cat. no. 1270.0.55.001)

Table 4 List of sub-state regions based on 2016 ASGS

	South Wales			
	er Sydney		Rest of New South Wales	
102	Central Coast	101	Capital Region	
115	Sydney - Baulkham Hills and Hawkesbury	103	Central West	
116	Sydney - Blacktown	104	Coffs Harbour - Grafton	
117	Sydney - City and Inner South	105	Far West and Orana	
118	Sydney - Eastern Suburbs	106	Hunter Valley exc Newcastle	
119	Sydney - Inner South West	107	Illawarra	
120	Sydney - Inner West	108	Mid North Coast	
121	Sydney - North Sydney and Hornsby	109	Murray	
122	Sydney - Northern Beaches	110	New England and North West	
123	Sydney - Outer South West	111	Newcastle and Lake Macquarie	
124	Sydney - Outer West and Blue Mountains	112	Richmond - Tweed	
125	Sydney - Parramatta	113	Riverina	
126	Sydney - Ryde	114	Southern Highlands and Shoalhaven	
127	Sydney - South West			
128	Sydney - Sutherland			
Victor	ia			
Greate	er Melbourne	Rest o	of Victoria	
206	Melbourne - Inner	201	Ballarat	
207	Melbourne - Inner East	202	Bendigo	
208	Melbourne - Inner South	203	Geelong	
209	Melbourne - North East	204	Hume	
210	Melbourne - North West	205	Latrobe - Gippsland	
211	Melbourne - Outer East	215	North West	
212	Melbourne - South East	216	Shepparton	
213	Melbourne - West	217	Warrnambool and South West	
214	Mornington Peninsula			
Queer	nsland			
Greate	er Brisbane	Rest	of Queensland	
301	Brisbane - East	306	Cairns	
302	Brisbane - North	307	Darling Downs - Maranoa	
303	Brisbane - South	308	Central Queensland	
304	Brisbane - West	309	Gold Coast	
305	Brisbane Inner City	312	Mackay - Isaac - Whitsunday	
310	Ipswich	315	Queensland - Outback	
311	Logan - Beaudesert	316	Sunshine Coast	
313	Moreton Bay - North	317	Toowoomba	
314	Moreton Bay - South	318	Townsville	
J_ 1		319	Wide Bay	
South	Australia	010	ao baj	
	er Adelaide	Post o	of South Australia	
401	Adelaide - Central and Hills	405	Barossa - Yorke - Mid North	
401	Adelaide - Central and milis Adelaide - North	405	South Australia - Outback	
402				
403	Adelaide - South	407	South Australia - South East	

(continued)

List of sub-state regions based on 2016 ASGS (continued)

Western Australia					
Greater Perth		Rest of Western Australia			
502	Mandurah	501 Bunbury			
503	Perth - Inner	509 Western Australia - Wheat Belt			
504	Perth - North East	510 Western Australia - Outback (North)			
505	Perth - North West	511 Western Australia - Outback (South)			
506	Perth - South East				
507	Perth - South West				
Tasmania					
601	Greater Hobart	Rest of Tasmania			
		602 Launceston and North East			
		603 South East			
		604 West and North West			
Northern Territory					
701	Greater Darwin	Rest of Northern Territory			
		702 Northern Territory - Outback			
Australian Capital Territory					
801	Australian Capital Territory				

Source: ABS 2016, Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016 (cat. no. 1270.0.55.001)

Reading the tables

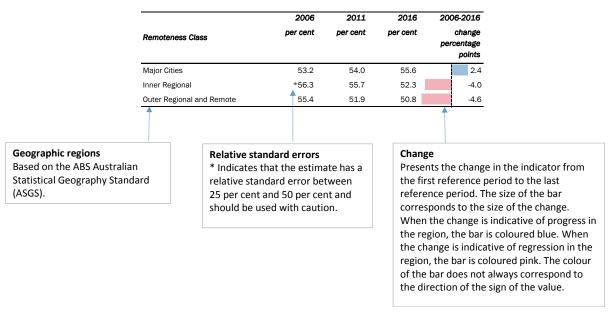
The Yearbook presents changes by indicator for regions across time. These tables include both the values for the indicators as well as a visual representation of the change in the indicator. Table 5 provides guidance on reading Yearbook tables and an explanation of key features.

The change bars represent the change in the indicator from the first reference period to the last reference period. The size of the bar corresponds to the size of the change. The change bars use a consistent scale within a single table, however, the scales may vary between tables, including using a separate scale for a single indicator across the different geographic levels.

When this change is indicative of progress in the region, the bar is coloured blue. When the change is indicative of regression in the region, the bar is coloured pink. The colour of the bar does not always correspond to the direction of the sign of the value. For the contextual indicators, the change bars are coloured grey irrespective of the direction of the change because these changes are not related to the concepts of progress or regress.

In some cases changes over time have been calculated before the rounding of table data. In these cases, the figure published for change over time may not sum with the rest of the data published for that region.

Table 5 Example table with guidance for interpretation



Source: BITRE analysis

Data quality and availability

Data quality

The indicators selected for inclusion in this Yearbook have met criteria that set a benchmark for the statistical quality of the data. These criteria are:

- Regional availability indicators should be available for at least one, but preferably two or more geographic scales.
- Time series progress indicators should be available as a consistent time series, with data frequency
 that supports assessment of medium-term trends. This also means that there should be firm plans for
 the data to be collected again in the short or medium term.
- Authoritative indicators should be collected by an official or government organisation, or a private organisation with a recognised history of high quality data provision.
- Nationally consistent indicators should be available on a nationally consistent basis. In cases where
 the data is collected by individual jurisdictions, it should use a consistent set of concepts and methods
 across regions.

However, some geographies are very small and data presented at this scale will be subject to volatility over time, particularly those presented at the Statistical Area Level 3 scale.

Data gaps

When developing the MAP publication, the ABS identified several progress themes that did not have any current data sources to support the measurement of progress at a national level. These themes are not represented in this Yearbook and represent current gaps in our ability to measure progress on key elements of societal progress.

Regional data

Developing this publication has highlighted where availability of regional data is limited. Some indicators included in this publication are only available at a limited number of geographic scales, are available on geographic scales that do not allow for easy comparisons to other indicators, or must be built from alternative data sources.

Some indicators which have high quality and timely data sources at the national level cannot be disaggregated to smaller geographic regions and therefore proxy indicators have been used. These indicators may not exactly match those presented in the ABS MAP publication, but broadly capture the same concepts of progress. Care should be taken when comparing the national data included in this Yearbook with the data presented in the MAP publication.

In other cases, there is extensive information published at the national and state level by government departments and agencies. Australian Government sites which may prove particularly useful in accessing regional data are nationalmap.gov.au and data.gov.au.

Online access

The online datasets will provide a more detailed geographic breakdown of data, allowing users to access data for Local Government Areas (2016, 2017 and 2018 – depending on data availability) and Statistical Areas Level 2 (SA2), where data is available. This more detailed data will provide the opportunity to develop better insights at the sub-state level.

The web data will be available from both the Australian Government data site data.gov.au and the Bureau of Infrastructure, Transport and Regional Economics (BITRE) website bitre.gov.au.

For further development

It is important to acknowledge that the existing set of indicators has some gaps. Data to be released in the next few years may help to fill some of those gaps. Some examples are provided below:

- A considerable number of indicators rely on data from the ABS that is available less frequently than yearly. In the future, there may be potential to improve the frequency of available data through statistical techniques such as data pooling to provide rolling annual estimates.
- Some data is still only available for capital city and balance of state; lower level geography is currently
 not available but is highly desirable. In the future, there may be potential to improve the level of
 geographic disaggregation through small area estimation techniques that are becoming increasingly
 standard methods for production of data at the ABS.

Readers are encouraged to provide feedback or suggestions for further development by email to Regional.Progress@infrastructure.gov.au.