

SGS Cities & Regions Wellbeing Index

Wellbeing insights to inform
policy and investment.

May 2024



Acknowledgment of Country

SGS Economics and Planning acknowledges the Aboriginal and Torres Strait Islander Peoples of Australia on whose Country we live and work.

SGS Economics and Planning acknowledges that the Aboriginal and Torres Strait Islander peoples of Australia are one of the oldest continuing living cultures on Earth, have one of the oldest continuing land tenure systems in the World, and have one of the oldest continuing land use planning and management systems in the world.

We pay our respects to Aboriginal and Torres Strait Islander Peoples, past and present, and acknowledge their stewardship of Country over thousands of years.

Foreword

For over a decade, SGS Economics and Planning has reported on Australia's economic performance of our bustling cities and diverse regions. As a purpose-driven, employee-owned company, we are committed to understanding what makes our nation thrive. This is core to our belief in building an economy that serves both people and the planet.

In this second edition, the SGS Cities & Regions Wellbeing Index (CRWI) is a framework designed to measure community outcomes across Australia in a consistent way. This Index departs from traditional GDP-centric narratives of growth and aims for a more holistic understanding of economic wellbeing.

Our team of economists, planners, and data scientists have rigorously analysed data from a mix of available sources to monitor key indicators that impact wellbeing. We've applied sound economic principles, measuring output and growth while also measuring environmental and social considerations. Our analysis recognises that wellbeing is influenced by factors such as safety, health, happiness, job satisfaction, social connections, and access to nature.

Following the release last year, our conversations with national, state, and local governments, industry, and the for-purpose sector have helped tighten our approach and explore and understand the limitations of the previous work.

There are still significant gaps in nationally consistent open data across many key indicators that would add value to our work—this is particularly limiting across climate risk and transport accessibility.

This year, we have delved deeper, providing insights on the local government area level. This empowers policymakers to better understand and address the unique needs of their communities. We are seeing more local governments nationally setting monitoring, evaluation and reporting frameworks based on improving community wellbeing. This evidence-based approach to policy and investment decision-making is key to addressing some of the most important issues facing our cities and regions.

This year, we have also examined data on gender pay gaps and analysed the links between different aspects of wellbeing. We know that where someone lives significantly impacts their wellbeing. Understanding these spatial differences is key to fostering strong, inclusive economies and communities.

The SGS CRWI is a catalyst for informed decision-making, policymaking, and strategic investments. While rewriting Australia's wellbeing narrative will undoubtedly be a journey, our commitment is unwavering. Our aim is to deliver robust evidence and analysis that inform conversations to create a brighter future for all Australians.

We aim to improve this approach by updating this Index annually. Regardless of your background—whether in academia, healthcare, private industry, or as a concerned citizen—we invite you to explore the SGS CRWI.

We welcome your queries about the data we used to support or apply its principles to your projects or decision-making processes.

Alison Holloway

Chief Executive Officer,
SGS Economics and Planning



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Glossary and definitions

Term / Abbreviation	Definition
ABS	Australian Bureau of Statistics
CAGR	Compound annual growth rate
GCCSA	Greater Capital City Statistical Area
GDP	Gross Domestic Product
GRP	Gross Regional Product
GSP	Gross State Product
LGA	Local government area
SA3	Statistical Area Level 3

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01 Introduction

01 Introduction

This edition of the SGS Cities & Regions Wellbeing Index provides timely evidence on the social, economic and environmental trends of Australia's cities and regions. It shows the importance of 'place' and that where you live influences your access to opportunities and overall wellbeing.

The Cities and Regions Wellbeing Index (CRWI) builds on over ten years of SGS research tracking the economic performance of our cities and regions. This research has demonstrated the patch work nature of the Australian economy and the growing spatial divide in economic growth and opportunities.

The CRWI goes beyond this pure economic lens, to measure the things that matter most to people's overall wellbeing. The research asks: are people in Australia leading happy, healthy, sustainable lives and is prosperity distributed evenly?

SGS is an employee-owned, certified B Corporation, and for over thirty years we have remained steadfast in our commitment to shaping better public policy for all Australians. We have helped governments, businesses, and community leaders better understand, assess and plan for our communities and we strive to shape our wider industry by sharing knowledge and advice openly.

The CRWI represents the result of this decades-long pursuit, focusing on the concepts of 'wellbeing economics' as a framework for how we produce effective public policy advice.

Objective wellbeing and the spatial impacts of public policy

What once were hallmarks of social progress and economic prosperity no longer accurately reflect wellbeing in modern societies. Despite owning a home, a record number of Australians are at risk of mortgage stress. Paid employment today is no guarantee of future earnings in a constantly evolving labour market. Growth in Gross Domestic Product (GDP), a standard measure of national performance, also fails to account for environmental harms. It does not recognise inequality and a growing divide between the haves and have nots. GDP also values life through work and misses other important factors such as: social and family connections, community resilience and access to quality open space.

But wellbeing is subjective, as everyone has their own perspective on life. For example, someone with a high-paying job and a view of the Sydney Harbour might still be unhappy, while another person might find contentment living a simple life in regional Australia.

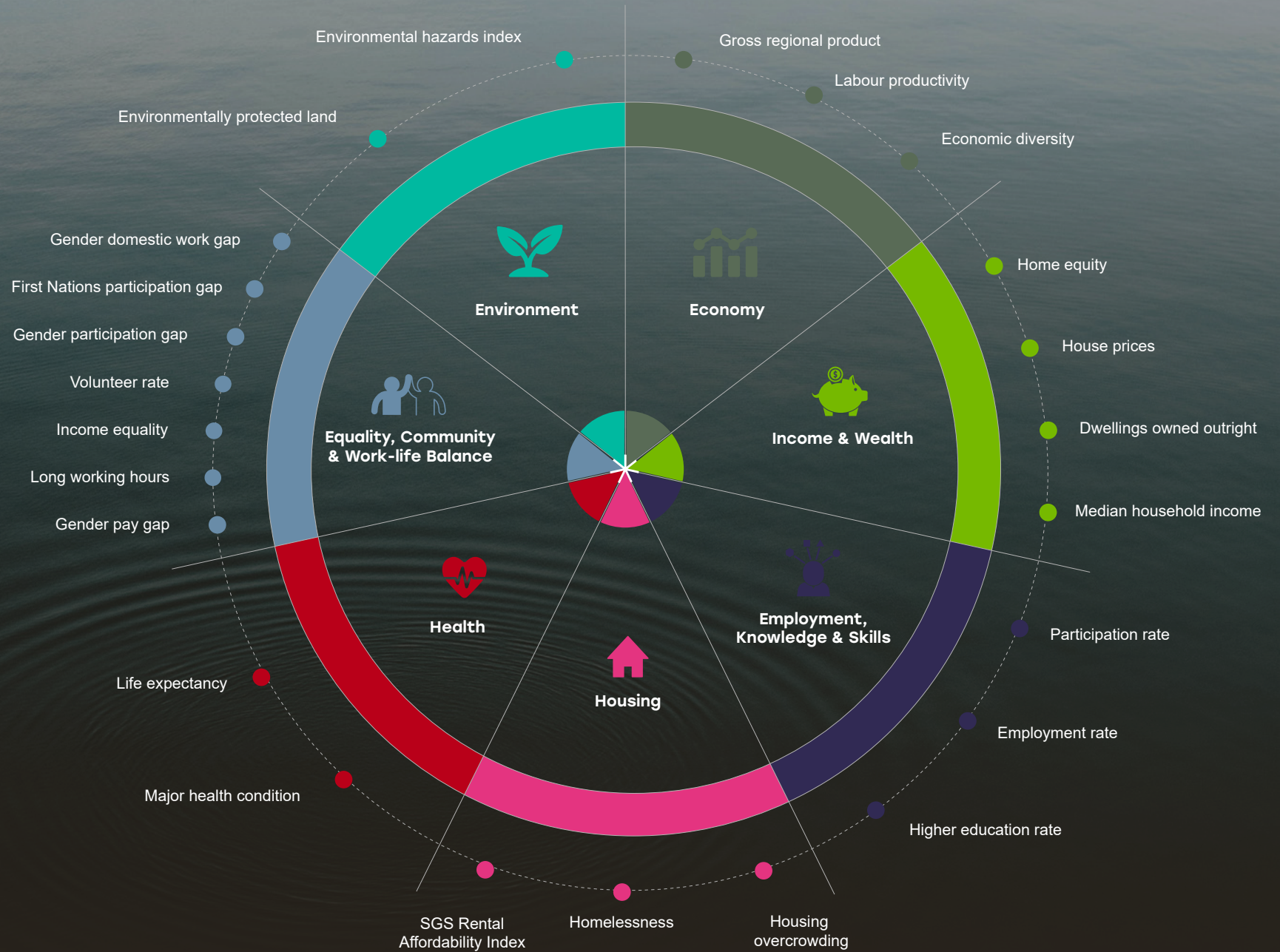
Many wellbeing measures currently seek to track this subjective, and self-reported, experience of wellbeing directly through surveys. The CRWI seeks to take an objective based approach, tracking the factors, outside an individual's control, which shape the quality of life within an area.

This objective measure of the factors driving wellbeing in a location, is an important complement to subjective wellbeing research and helps to provide a link between the impacts of place-based policy and planning, investment choices, and an individual's subjective experience.

The CRWI tracks a Local Government Area's (LGA) objective wellbeing by combining 24 indicators across seven dimensions.

Dimension	Definition
Economy	A region's economic output, productivity, and diversity shows how well the local economy is performing.
Income and Wealth	Communities with higher incomes and greater levels of wealth provide greater levels of security, stability and opportunities.
Employment, Knowledge, and Skills	Includes levels of education and engagement in the workforce which can contribute to financial and broader personal satisfaction.
Housing	Includes rates of homelessness, affordability, and overcrowding. As shelter is a basic human need, issues around housing access impact wellbeing.
Health	Considers life expectancy and rates of illness, which can be linked to access to healthcare and cultural factors.
Equality, Community, and Work-life Balance	Includes volunteer rates, work-life balance, gender and First Nations equality indicators.
Environment	Assesses a location's risk to environmental hazards and access to national parks, reserves, and protected areas.

The seven dimensions of the CRWI framework



A practical tool for tracking data region by region

Since 2011, SGS has advanced a spatial understanding of socio-economic performance across Australian cities and regions. Our annual publication of small area estimates of GDP fills a data gap at the regional scale. This data forms a key input into place-based policy development, impact measurement, and outcomes monitoring so that everyone, everywhere can benefit from more equitable policy and investment decisions.

Our investigation of socio-economic outcomes over the years has highlighted that economic activity is far more nuanced than headline state and national GDP measures suggest. Australia's cities and regions are distinctly composed of their unique industry strengths, growth trends, human capital base, and many other factors.

Just as each city and region is uniquely positioned to contribute to the national economy, so too do their capacities to build and maintain resilience against adverse impacts. This has never been more apparent than in the aftermath of recent events. Natural disasters, the COVID-19 pandemic, and geopolitical events affecting global business conditions and population migration patterns have all but reshaped familiar structures. From housing to employment opportunity and from one population group to another, a common thread emerges that the elements of wellbeing are more connected than has traditionally been recognised in policy and practice.

Importantly, indicators and frameworks do not create the change we need; it's how we develop and apply insights from these tools as policymakers, governments, investors, researchers, and community members.

What's new in this Cities and Regions Wellbeing Index?

This edition of the CRWI introduces:

- **Data at the local government area (LGA) level.** LGAs are an administrative division for which incorporated local governing bodies have responsibility. LGA-level data supports a local understanding of and responses to the issues that are affecting local communities.
- **A closer look at how wellbeing dimensions interact.** The determinants of wellbeing are intrinsically linked. For example, environmental quality shapes public health outcomes, while housing security lays the foundations for people to remain in stable employment.

The CRWI data presents one layer of insight by enabling comparisons from place to place. Increasingly, however, public policy is applying expanded methods of statistical analysis to infer the trends and drivers of socioeconomic issues. These methods have existed for a long time. Still, it is only more recently—with the advent of better quality, spatially detailed and time series data—that analysts have been able to explore a wider toolkit for developing, monitoring, and evaluating public policy.

Head to the CRWI Dashboard, an interactive tool for exploring wellbeing in your local area and other cities and regions.



- **A new gender pay gap indicator.** As an annual publication, the CRWI framework seeks to implement refinements—balancing issues of data quality and availability—to better reflect public policy priorities. In this release focussing on 2023 data, the CRWI incorporates a gender pay gap indicator, recognising recent mandates in national gender pay gap and employee data reporting requirements to the Workplace Gender Equality Agency. Over time, data for this indicator will serve as a baseline for identifying the regions that have improved the most, relative to other regions.

It is worth noting that apart from in times of major shock, such as the COVID-19 pandemic or natural disaster, community level wellbeing is not likely to shift significantly from year to year in the CRWI data.

Building and restoring wellbeing in communities takes time. It results from the continual and co-ordinated refinement of public policy in a range of areas:

- Sustainable economic development
- Affordable and well-located housing as a human right
- Quality and accessible health, education, and human services
- Environmental protections
- Community resilience and social cohesion.

By comparison, individual wellbeing is sensitive to many factors. It can peak and trough throughout one's life following changes to employment, health status, and housing situation. Any of these events or a combination of circumstances can expose us to material hardship or pave the way for a more positive future.

Reporting geographies

In this report, Australia's social and economic wellbeing is analysed at five geographic scales:

1. By the whole nation.
2. By the six states and two territories.
3. By 17 'Capital Cities' and 'Rest of State' areas – these are based on the ABS Greater Capital City Statistical Area (GCCSA) definition. Noting ACT is defined as a Capital City only, with no rest of state area.
4. By 518 Local Government Area (LGA) – based on the ABS 2021 LGA definition which includes 537 LGAs nationally. Note that due to data limitations, results are not reported for areas with a population of less than 500 people.
5. By three functional urban typologies: urban and urban fringe, urban regional and rural. These are defined based on a custom grouping of LGAs where capital cities are largely defined as urban and urban fringe; major regional centres are urban regional; and other areas are rural.

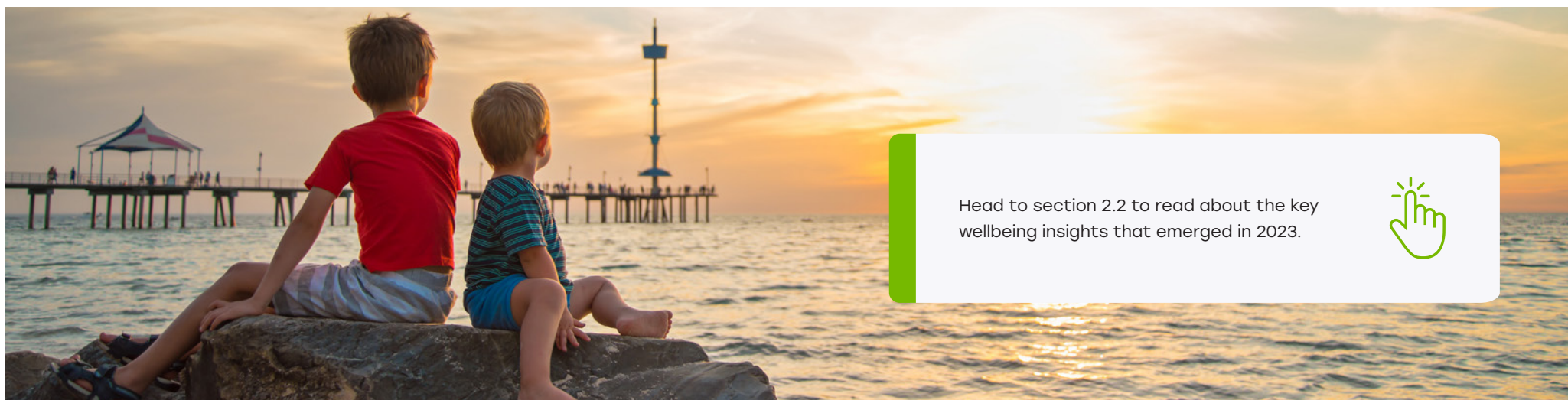
Notes on the Cities and Regions Wellbeing Index data refresh

This edition, based on 2023 data, marks the first release based on LGA-level data instead of ABS Statistical Area Level 3 (SA3), which was the base geography for the previous release, based on 2022 data. Going forward LGAs will be the base geography for the CRWI, enabling users to track wellbeing performance in LGAs over time.

In addition to a new gender pay gap indicator, in this year's CRWI, we have also updated wellbeing indicators across the seven dimensions, where new data released from the past year was available. However, for some indicators there is no new or updated data source available. This is partly reflective of the gaps in publically available data that track Australia's wellbeing over time and also partly due to the stable nature of some aspects of a location's underlying wellbeing factors.

For these reasons, direct comparisons between this release and last year's CRWI publications may not be accurate. Rather than tracking the trends of a single location in isolation, the CRWI is most useful as a tool to understand how the external factors that influence wellbeing and how its various dimensions vary across Australia at a point in time.

You can find more details on the data sources and methodology in Chapter 4's Technical Appendix.



Head to section 2.2 to read about the key wellbeing insights that emerged in 2023.



1.1 Start exploring

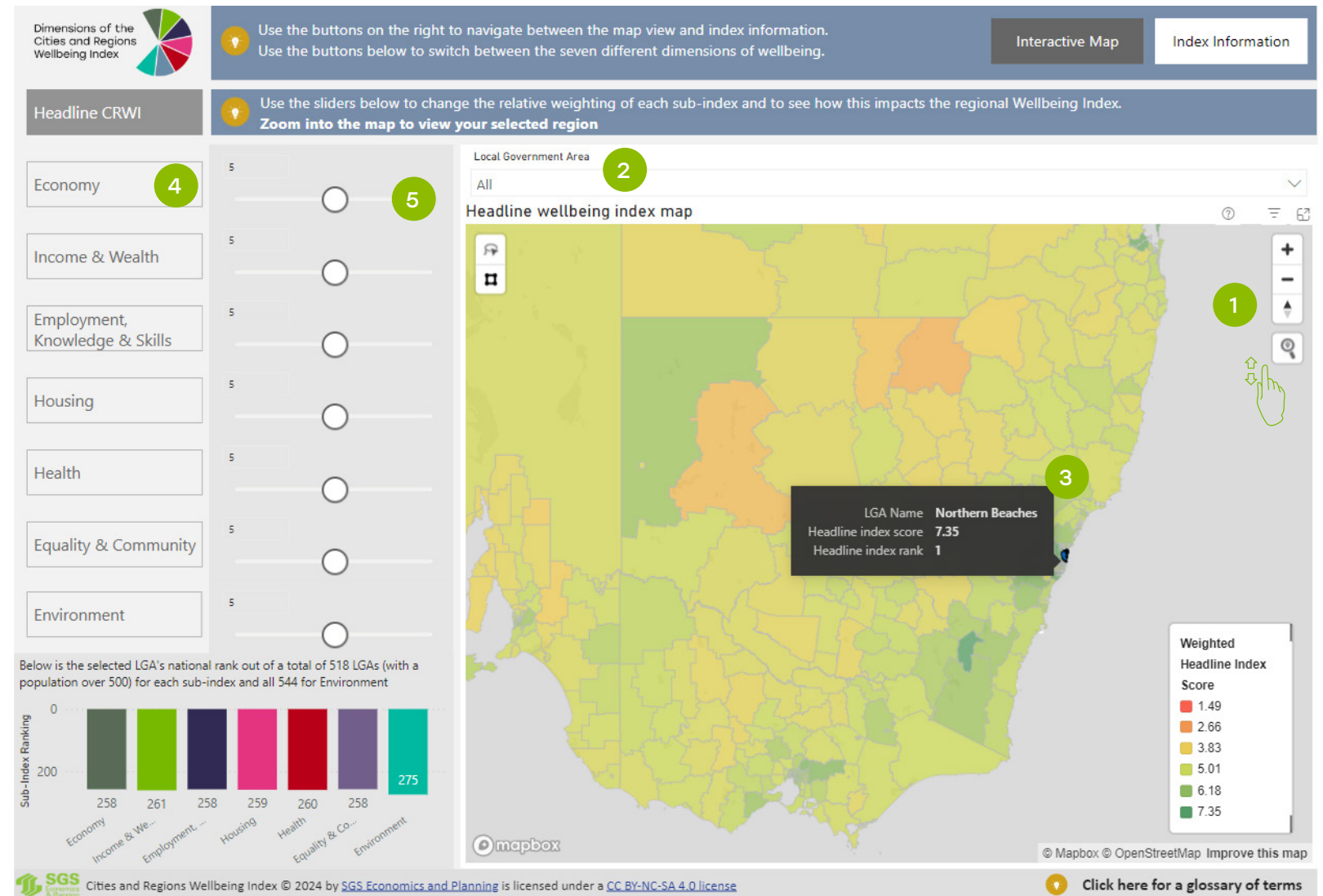
The [CRWI 2023 Dashboard](#) enables anyone to learn more about the objective wellbeing framework and to explore what wellbeing looks like in their LGA as compared to other regions of Australia.

There are two views:

Interactive Map

In the Interactive Map view you can:

1. Scroll and zoom around the map to find your location of choice
2. Use the drop down menu to jump straight to your location of choice
3. Hover over a location to see the Wellbeing Index and seven Dimensions
4. Click through the seven Wellbeing Dimensions to see them on the map
5. Adjust the weightings for the seven Dimensions to see how that impacts the headline wellbeing score.



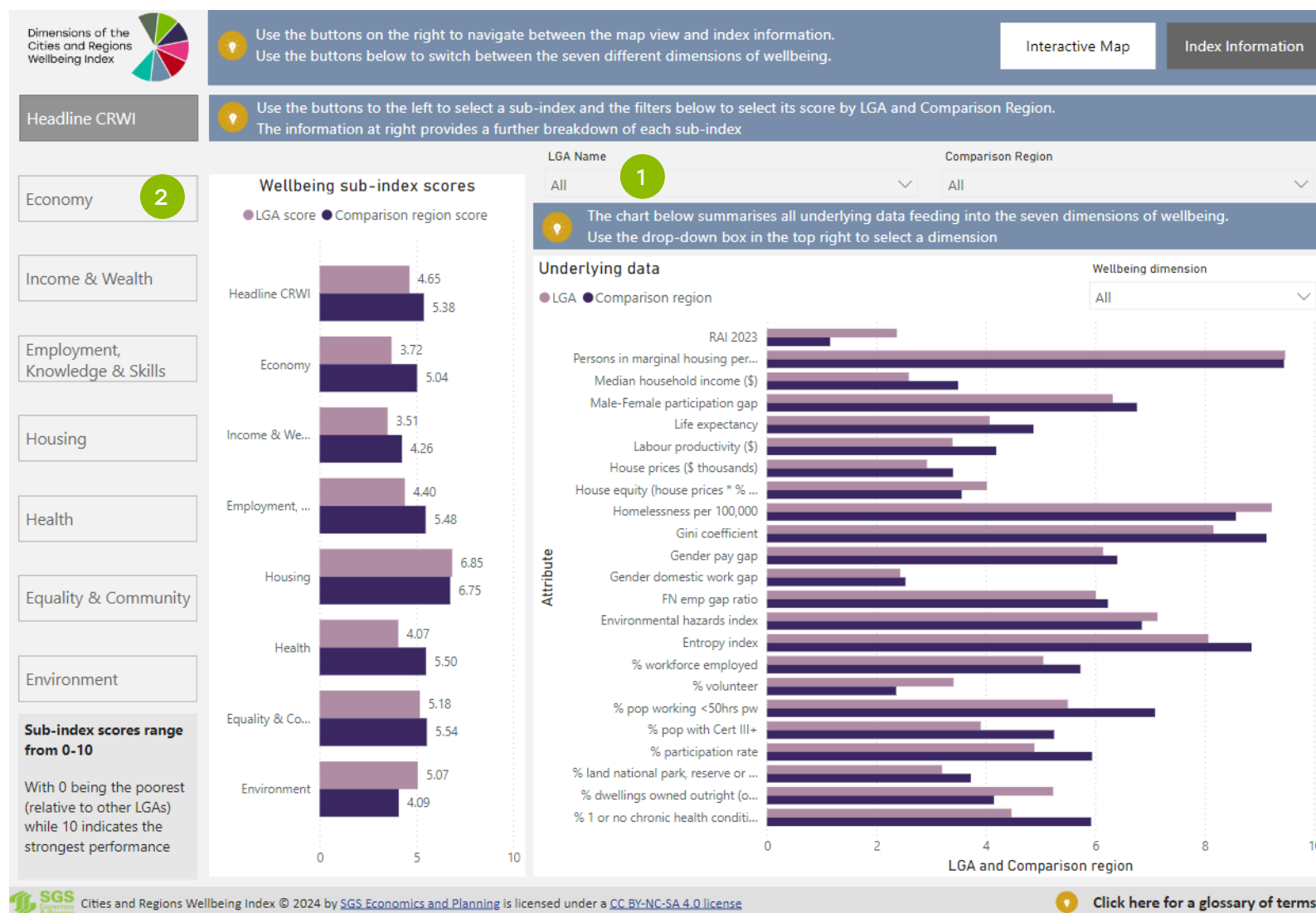
Index Information

In the Index Information view you can:

1. Use the drop down menu to jump straight to your location of choice. Then select a comparison region to compare it with.
2. Click through the seven Wellbeing Dimensions to see the data metrics and trends which make up each Index.

Got a question?
Interested in a briefing?

Reach out to us at
sgsvic@sgsep.com.au.



1.2 Get involved in shaping a brighter future

We believe that everyone has a role to play in improving wellbeing outcomes. That is why the CRWI is an annual publication that is open access to all.

We are proud to be leading independent research through the CRWI at a time when governments around the world are increasingly focused on the wellbeing economy and wellbeing budgets to guide positive and sustainable change. Anyone can help to shape the CRWI.

We want to hear from you!

Get in touch with us:

sgsvic@sgsep.com.au



We want to hear from:

Policymakers and governments:

- How you are using the CRWI data and its indicators?
- What programs or initiatives have the insights prompted in your local communities?
- What objective wellbeing indicators would you like to see in future releases?

Project collaborators:

- What data sources would be ideal for the CRWI?
- What elements of the CRWI framework can be improved?
- What big ideas for research and collaboration are you interested in working with us on?

Australian communities:

- What does wellbeing mean to you?
- How are you using the CRWI in your study, work, or in your day-to-day conversations?



A wide-angle photograph showing two people sitting on a dark, rocky hill in the foreground, looking out over a vast, flat landscape. The landscape is covered in dense green vegetation and interspersed with small bodies of water. The horizon is low, and the sky is a deep blue, filled with long, wispy white clouds that appear to be radiating from a point above the horizon. The lighting suggests it might be late afternoon or early morning, with a warm glow on the horizon.

02 National Overview

02 National Overview

2.1 A snapshot of Australia's wellbeing

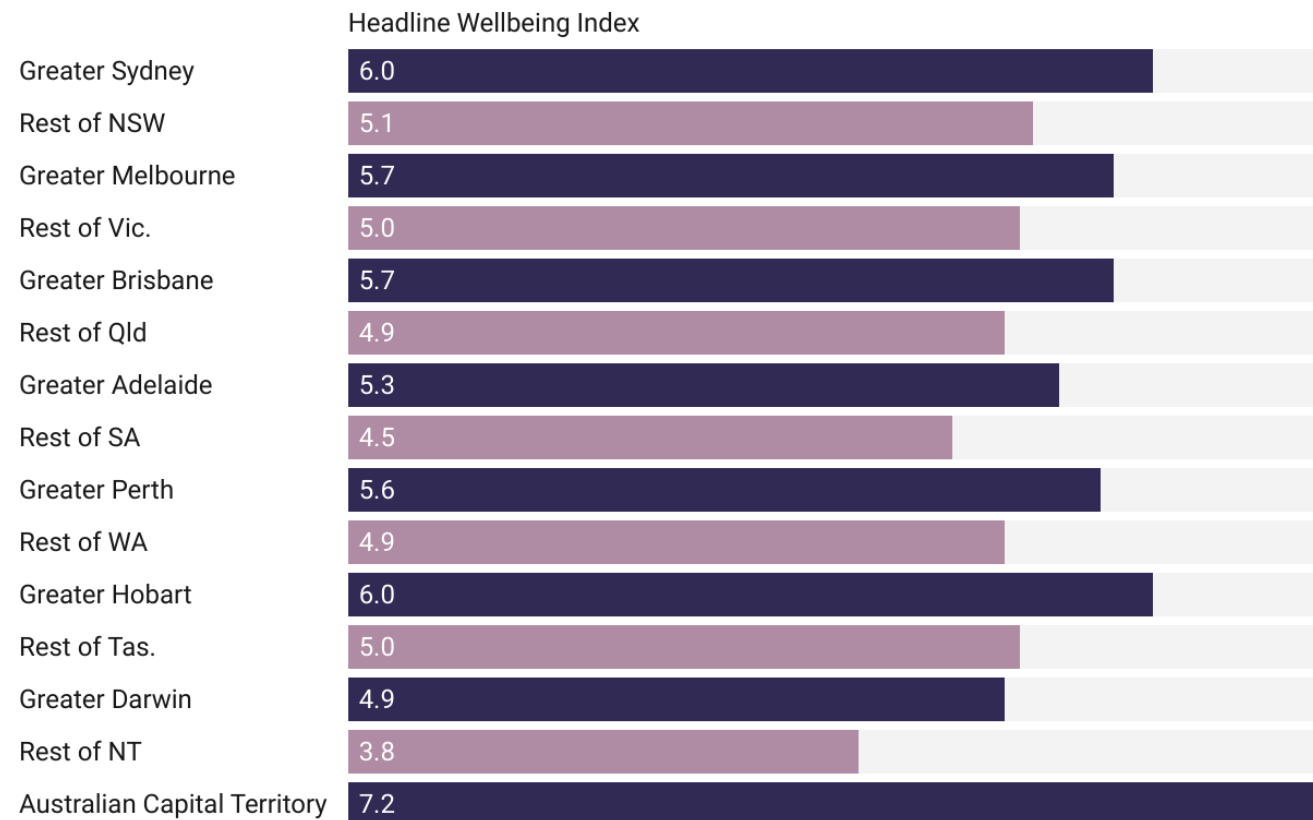
Overall, the spatial divide in the national's wellbeing scores is clear—with all capital cities performing better than their rest of state regions in 2023. The Australian Capital Territory performed the best overall, followed by Sydney, Brisbane, Melbourne, and Hobart.

The drivers behind the headline wellbeing score start to show a more nuanced picture, with each region differing in their relative strengths.

Greater Sydney performed strongly on Income & Wealth and Health dimensions, while Greater Brisbane score highly on the Economy dimension. Greater Darwin performed well on Employment, Knowledge & Skills and the Environmental dimensions.

The largest differences in urban-regional wellbeing scores were in the Health dimension, due to the life expectancy gap and the greater proportion of regional residents who live with multiple chronic health conditions. For other wellbeing dimensions, such as Equality, Community & Work Life Balance, capital cities and their regional counterparts were more aligned. Indicators such as the gender domestic work gap and gender pay gap were similar when comparing the city and rest of state regions in almost all States and Territories.

CRWI Headline Wellbeing Index by GCCSA

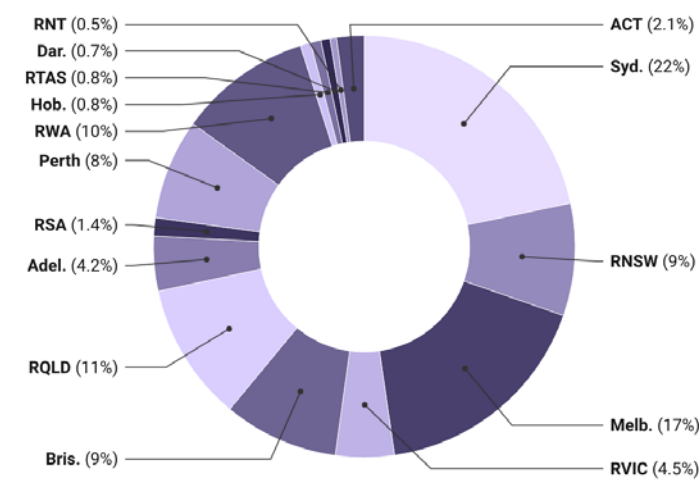


Source: SGS Economics and Planning

2.2 Key insights from 2023

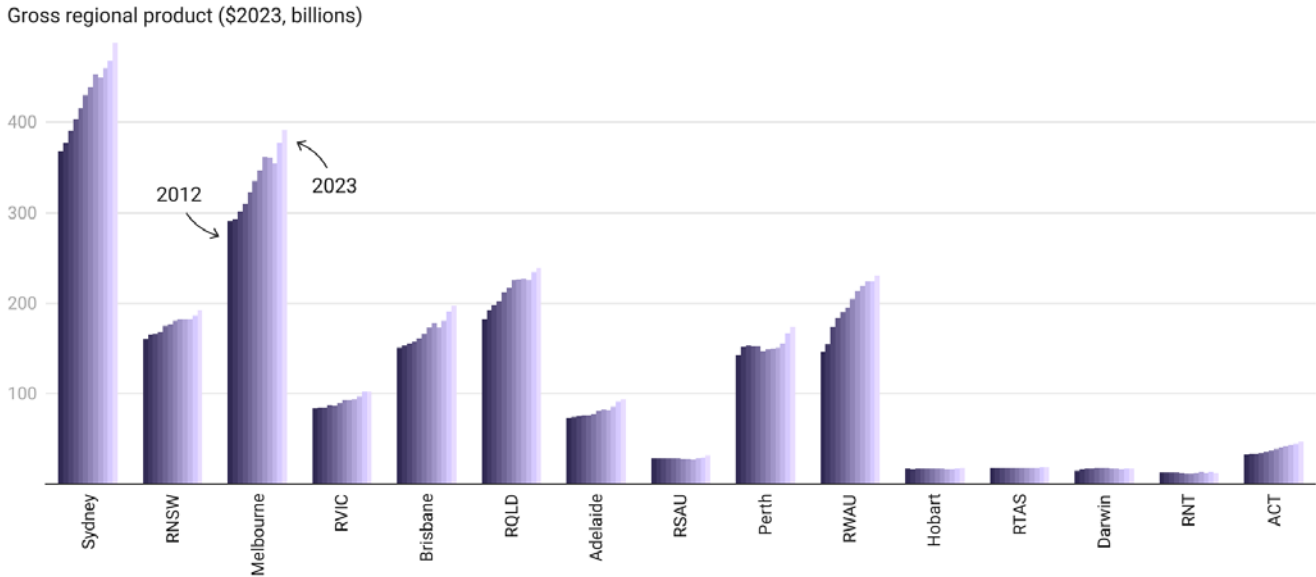
In 2023, Sydney and Melbourne’s economies represented a combined 39 per cent of the nation’s economy while the Brisbane, Perth and Adelaide economies represented a combined 21 per cent. These shares are similar to the 2022 figures. Western Australia and Queensland were also the only jurisdictions where the regional areas contributed more to GRP than their capital city counterparts.

Composition of Australia’s economy



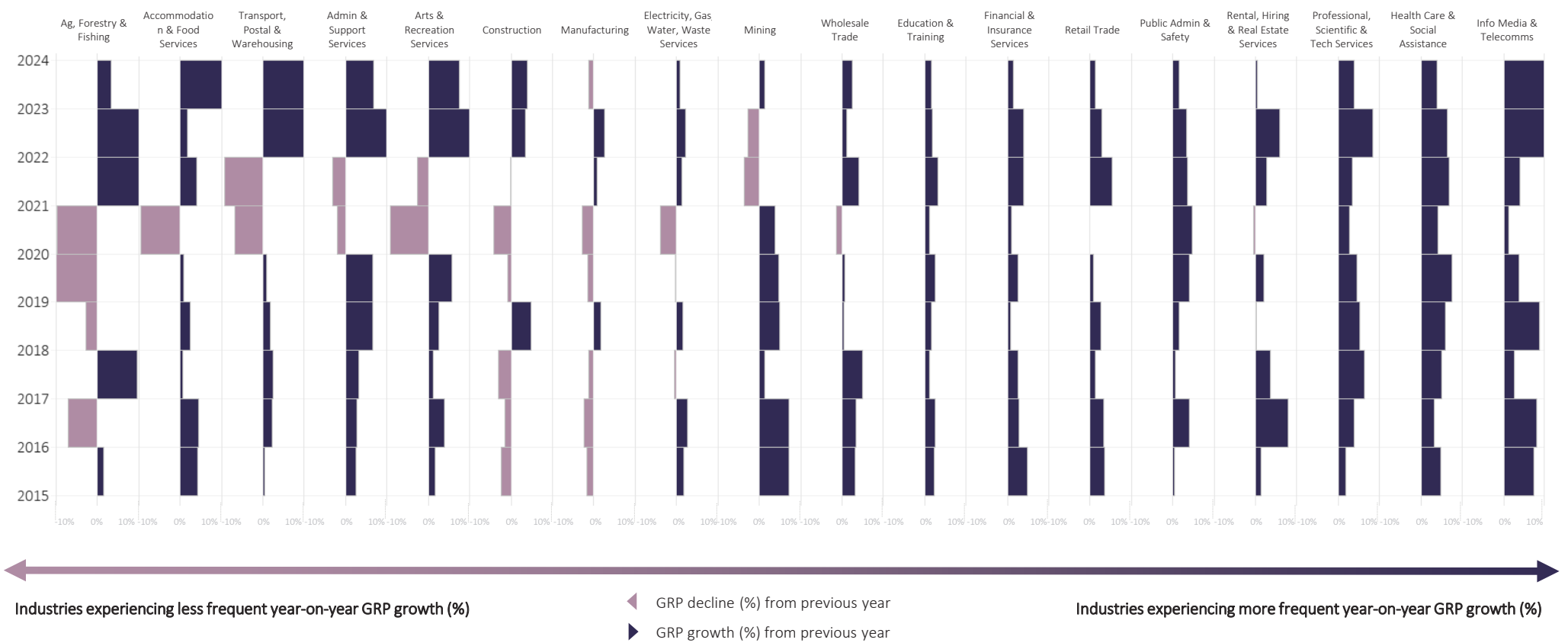
Source: SGS Economics and Planning

Economies of Australia’s Cities and Regions



Source: SGS Economics and Planning

The shape of Industry GRP growth throughout the years



Strong agricultural recovery in the regions, despite the compounding effects of flood, bushfire, and the COVID-19 pandemic, particularly in NSW, QLD and VIC.

The hospitality sector was one of the hardest hit by the COVID-19 pandemic. While labour shortages and shifts in household consumption continue to impact recovery, 2023 saw an upswing in industry growth.

Steady year-on-year growth in GRP across the majority of knowledge intensive industries is coupled with some of the highest proportionate growth in labour force since 2011.

The COVID-19 pandemic shed light on essential services such as health care and social assistance, although the industry has been growing steadily over the last decade. In 2023, health care and social assistance was the largest driver of GRP growth in regional Victoria. The role of housing in enabling essential health workers to deliver care in the right places and at the right time is critical.

A national view of gender and societal inequity

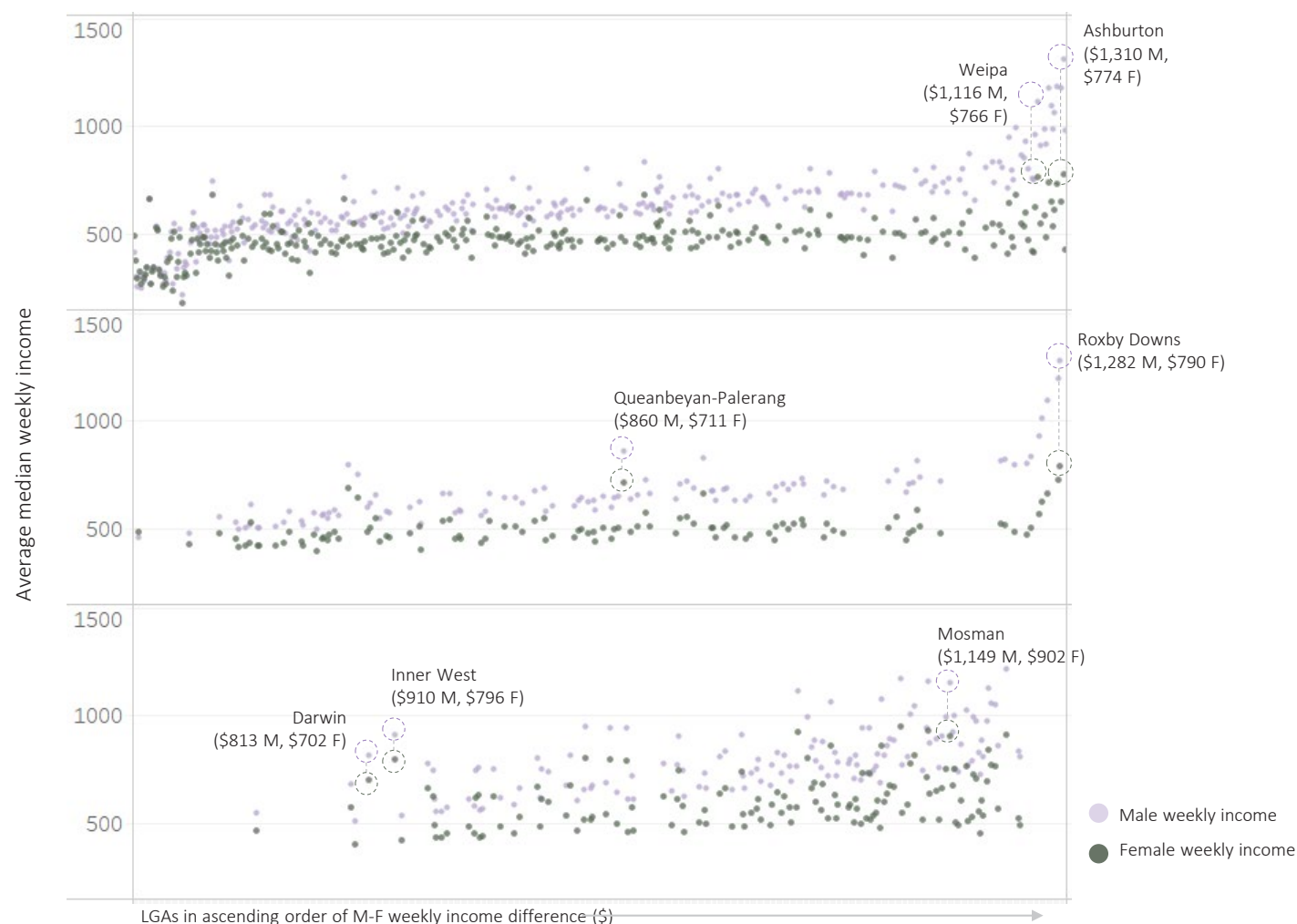
The analysis of the gender pay gap by LGA remoteness reveals some notable trends. The gendered nature of regionally based industries, such as mining and agriculture, and rural livelihoods is highlighted by the chart on the right:

- In regional and rural areas, many LGAs with the largest dollar value difference between male and female weekly incomes are mining communities
- Rural LGAs have some of the smallest and largest differences in male and female weekly incomes
- Even in regional centres with strengths in the knowledge economy (e.g. Queanbeyan-Palerang), a moderate gender pay gap persists despite more balanced workforce participation by gender
- A gender pay gap persists at all income levels and in communities that vary considerably in socio-demographic profile.

Rural

Urban Regional

Urban & Urban Fringe

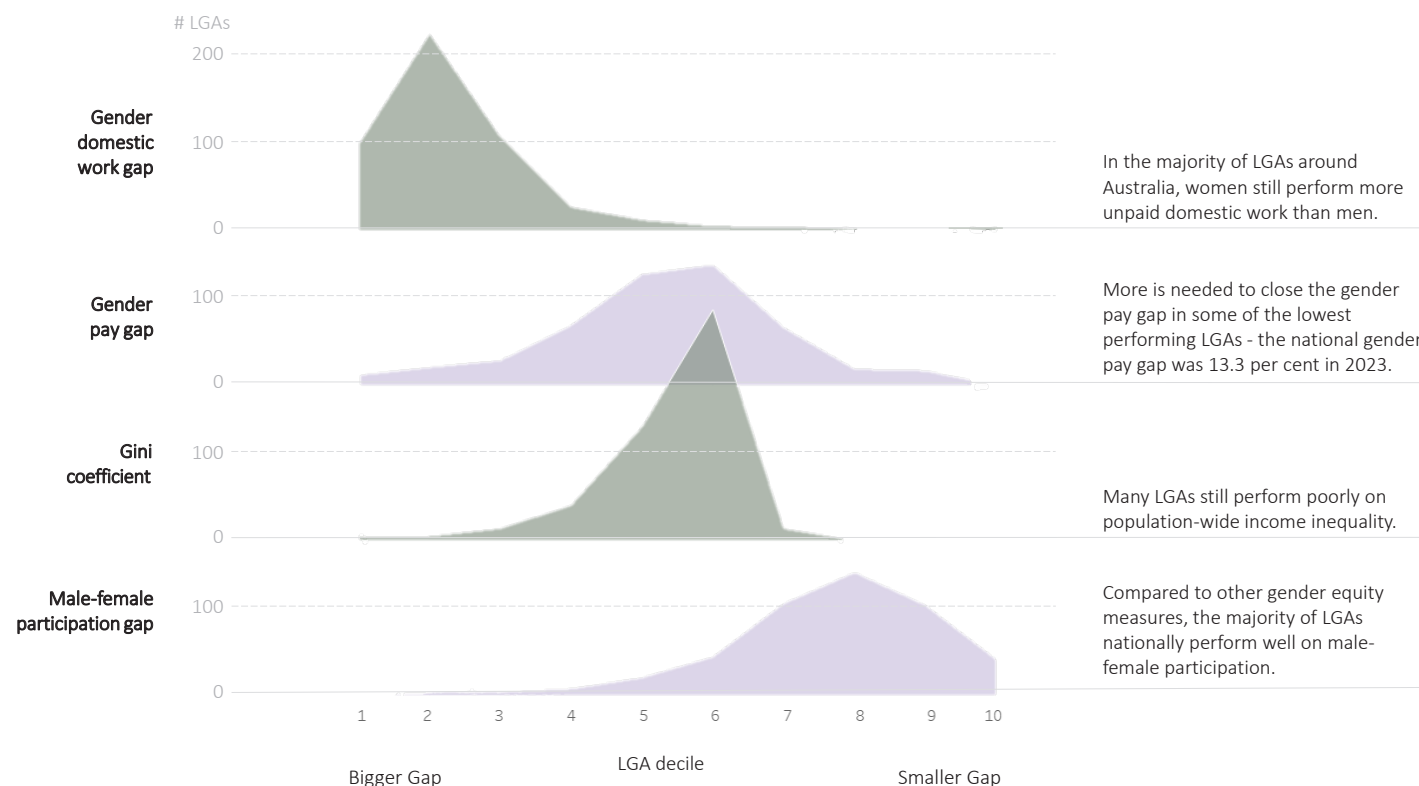


Interpreting this chart: Each pair of dots (vertically aligned) represents the population-weighted average male (purple) and female (green) weekly income for a given LGA. LGAs are sorted from left to right in increasing order of the raw difference in weekly income (\$). The Rural, Urban Regional, and Urban & Urban Fringe categories are based on the Australian Classification of Local Government (ACLG). Since 1994, the ACLG has defined 22 classes of local governments based on population, population density, and the proportion of the population classified as urban within a local government area. For the purposes of this visualisation the categories have been regrouped into three segments.

An analysis of LGAs by decile across several gender and income equity indicators highlights that despite many LGAs performing relatively well on the male-female workforce participation gap, women in a majority of LGAs are still bearing the brunt of unpaid domestic work.

The ‘double shift’ in women’s workloads has major implications for the overall wellbeing of society. It impacts how women progress through their careers relative to men, their financial independence over their lifetimes, and therefore their ability to recover quickly from events such as divorce and homelessness.

Interpreting this chart: This chart visualises the distribution of LGAs by indicator decile. Where the shape of distribution is skewed left, this means the majority of LGAs perform poorly relative to fewer higher-scoring LGAs (e.g. gender domestic work gap). Where the shape of the distribution is skewed right, this means the majority of LGAs perform well relative to fewer lower-scoring LGAs (e.g. male-female participation gap). The spread of the LGAs by decile also indicates whether LGAs nationally are more alike (e.g. Gini co-efficient) or more different (e.g. gender pay gap) than one another.



The choice between rental affordability and proximity to services

Most LGAs within 100km of a major urban centre are moderately unaffordable. LGAs with more affordable rentals are typically located between 150-400km from a capital city. This is prohibitive to workers requiring centrally located rental options and/or whose personal circumstances require proximity to services and infrastructure. A state-by-state breakdown illustrates some regional differences:

- In New South Wales and in Western Australia, rentals for the average household are generally more unaffordable the closer one lives to the capital city. There are some exceptions, such as in Kalgoorlie-Boulder and Karratha in Western Australia.
- In Queensland, Tasmania, and Victoria, rental affordability does not improve even in LGAs farther from the capital city. In Queensland, the tourist towns of Whitsunday and Cairns record a Rental Affordability Index score on the border of 'Acceptable' to 'Moderately Unaffordable' rent for the average household.

Interpreting this chart: Each dot represents an LGA. The chart plots the LGA's rental affordability by its distance from the nearest capital city (note: for cross-border communities, this is not always its relevant State/Territory capital city). The Northern Territory is excluded as there is inadequate rental data for developing the Rental Affordability Index. The Australian Capital Territory is excluded as it comprises one LGA ('Unincorporated ACT'). More information about the Rental Affordability Index and the affordability continuum can be found [here](#).



Highest and lowest performing regions by wellbeing dimension

An analysis of the highest and lowest performing regions by wellbeing dimension illustrates the inter-connectedness of wellbeing determinants. Regions like Ku-ring-gai, North Sydney and Sydney in the Greater Sydney region performed in the top 5 LGAs nationally on more than one dimension, as did Yarra and Melbourne in Greater Melbourne. In contrast, Yarrabah, West Daly, the Tiwi Islands, and Walgett performed poorly on more than one dimension.

Dimension	Summary	Highest performing regions	Lowest performing regions
Economy	<p>Top performing regions reflect Australia's economic geography, with economic activity concentrated in major capital cities.</p> <p>There are several relationships between a regional economy and the income, wealth, employment, knowledge, and skills mix of regional communities, as described below.</p>	<ul style="list-style-type: none"> • Sydney • Melbourne • Brisbane • Australian Capital Territory • Perth 	<ul style="list-style-type: none"> • Palm Island • Gwydir • Yarrabah • Torres Strait Island • Carrathool
Income & Wealth	<p>All top performing regions are located in Greater Sydney, while poorer performing regions were mostly located in regional areas of the Northern Territory, with the exception of a remote north-west Aboriginal community in South Australia.</p> <p>The relationships between a region's economic resources and labour market trends is no doubt related to key measures of financial security, such as individual and household income and wealth.</p>	<ul style="list-style-type: none"> • Hunters Hill • Ku-ring-gai • Mosman • Woollahra • Northern Beaches 	<ul style="list-style-type: none"> • Anangu Pitjantjatjara Yunkunytjatjara • West Daly • Tiwi Islands • Central Desert • East Arnhem
Employment, Knowledge & Skills	<p>Top performing regions were concentrated in Greater Melbourne and Greater Sydney. Regions that performed poorly on this dimension were mostly located in the Northern Territory.</p> <p>A regional workforce's knowledge, skills, and educational attainment can influence a region's industry mix (e.g. in the types of businesses that choose to locate there) and vice versa (e.g. where qualified individuals relocate for a job).</p>	<ul style="list-style-type: none"> • Yarra • Vincent • Melbourne • North Sydney • Sydney 	<ul style="list-style-type: none"> • Yarrabah • West Daly • West Arnhem • Tiwi Islands • Roper Gulf

Dimension	Summary	Highest performing regions	Lowest performing regions
Housing	<p>All but one of the top performing LGAs on the housing dimension are in regional NSW—these were regions that performed well on the Rental Affordability Index, a measure of rental affordability relative to household incomes.</p> <p>Regions that did not perform well on the Housing dimension performed especially poorly on the homelessness and persons in marginal housing indicators.</p>	<ul style="list-style-type: none"> Lockhart Bogan Esperance Cobar Bourke 	<ul style="list-style-type: none"> Yarrabah Perth Palm Island Ceduna Walgett
Health	<p>Of all the dimensions in the CRWI framework, the largest spatial divide nationally is in the Health dimension.</p> <p>Three of the top five performing regions on the Health dimension nationally are in Greater Sydney's lower north shore region. The Hills District in the north-west and Ku-ring-gai in northern Sydney also performed well.</p> <p>The lowest performing regions on the Health dimension were located in regional New South Wales and Western Australia.</p>	<ul style="list-style-type: none"> Ku-ring-gai Lane Cove The Hills Willoughby North Sydney 	<ul style="list-style-type: none"> Walgett East Pilbara Coonamble Bourke Derby-West Kimberley
Equality, Community & Work Life Balance	<p>The top five performing regions on this dimension were distributed across five state and territories.</p> <p>The lowest performing regions are located in Western Australia, South Australia, and New South Wales.</p>	<ul style="list-style-type: none"> Yarra Hobart Streaky Bay Sydney Australian Capital Territory 	<ul style="list-style-type: none"> Coolgardie Warooka Roxby Downs Mandurah Carrathool
Environment	<p>The highest performing regions on the Environment dimension were located in Victoria, Tasmania, Western Australia, and South Australia.</p> <p>The majority of poorer performing regions are located in the Northern Territory. Many of these areas are of ecological significance and at risk of environmental hazards from industrial development and natural disaster.</p>	<ul style="list-style-type: none"> Mildura West Coast Derwent Valley Mandurah Southern Mallee 	<ul style="list-style-type: none"> Tiwi Islands Darwin Palmerston Port Hedland Litchfield

Note: Analysis excludes LGAs with small populations (under 2,000 residents) and where there is incomplete input data for one or more indicators within the dimension.

A person wearing a straw hat and a green and white striped shirt is riding a yellow and black ATV through a field of cattle. The person is seen from behind, herding a large group of light-colored cows. The background shows a line of trees under a clear blue sky with some light clouds. The overall scene is captured in a warm, golden-hour light.

03 State and Territory Profiles

03 State and Territory Profiles

Economic Overview 2023 GRP (\$b) and 3-year average annual growth (%)					Wellbeing Overview 2023 Cities and Regions Wellbeing Index (headline)			
	State / Territory	Capital City	Rest of State	Summary	Capital City	Rest of State	Highest headline wellbeing score	Lowest headline wellbeing score
NSW	\$733.1 (2.9%)	\$525.7 (3.0%)	\$207.4 (2.5%)	Strong growth in the services sector in Sydney, driven by hospitality and transport. Mining and transport-led regional growth.	6.0	5.1	<ul style="list-style-type: none"> Northern Beaches North Sydney Ku-ring-gai Hornsby Lane Cove 	<ul style="list-style-type: none"> Walgett Moree Plains Coonamble Narromine Federation
VIC	\$535.5 (2.9%)	\$424.8 (2.9%)	\$110.7 (3.2%)	Strong growth in Melbourne, led by the hospitality and transport sectors, outweighed a marginal decline across Regional Victoria.	5.7	5.0	<ul style="list-style-type: none"> Melbourne Nillumbik Yarra Port Phillip Yarra Ranges 	<ul style="list-style-type: none"> Loddon Central Goldfields Buloke Pyrenees Latrobe
QLD	\$464.6 (3.6%)	\$209.8 (4.9%)	\$254.8 (2.5%)	Brisbane outpaced the regions, led by strong growth in transport, professional services, and hospitality. In regional Queensland, a decline in mining production was outweighed by growth in other sectors: transport, public administration, and agriculture.	5.7	4.9	<ul style="list-style-type: none"> Brisbane Noosa Douglas Redland Gold Coast 	<ul style="list-style-type: none"> Yarrabah Palm Island Northern Peninsula Torres Strait Island North Burnett
SA	\$134.2 (4.8%)	\$100.5 (4.6%)	\$33.7 (5.4%)	Regional South Australia was the fastest growing sub-region in Australia, led by increased mining and agricultural outputs. Adelaide benefited from an increase in tourism and strong growth in the construction sector.	5.3	4.5	<ul style="list-style-type: none"> Mitcham Burnside Unley Adelaide Hills Prospect 	<ul style="list-style-type: none"> Mid Murray Anangu Pitjantjatjara Yunkunytjatjara Yorke Peninsula Port Augusta Barunga West

Economic Overview 2023 GRP (\$b) and 3-year average annual growth (%)					Wellbeing Overview 2023 Cities and Regions Wellbeing Index (headline)			
WA	\$418.8 (3.2%)	\$180.2 (4.9%)	\$238.6 (2.0%)	Increased mining production headlined growth in Western Australia, particularly in the regions. Perth was boosted by the continued recovery in passenger transport, as well as increased demand for construction and professional services.	5.6	4.9	<ul style="list-style-type: none"> Cambridge Perth Cottesloe Nedlands Vincent 	<ul style="list-style-type: none"> Derby-West Kimberley Halls Creek Coolgardie Port Hedland Karratha
TAS	\$38.6 (3.4%)	-	-	Growth in services sector- particularly transport, hospitality, and health- outweighed a decline in agriculture and wholesale trade.	6.0	5.0	<ul style="list-style-type: none"> Hobart Kingborough Meander Valley Clarence Sorell 	<ul style="list-style-type: none"> George Town Devonport Brighton Central Highlands Latrobe
NT	\$30.1 (-0.6%)	-	-	The Northern Territory was the only jurisdiction to experience a decline in GSP in 2022-23, led by a decrease in oil and gas production.	4.9	3.8	<ul style="list-style-type: none"> Litchfield Darwin Palmerston Alice Springs Unincorporated NT 	<ul style="list-style-type: none"> West Daly Tiwi Islands Barkly West Arnhem MacDonnell
ACT	\$46.8 (3.7%)	-	-	The Australian Capital Territory was the fastest growing jurisdiction in 2022-23, increasing by 4.3 per cent through the year, primarily due to growth in public administration.	7.2		-	

Source: SGS Economics and Planning (2024). Note: Capital City and Rest of State breakdown is not available for Tasmania, Northern Territory, and the Australian Capital Territory.

A photograph of two women sitting on a ferry, looking out at the Sydney Harbour Bridge. The woman on the right is smiling and looking towards the bridge. The woman on the left is also looking towards the bridge. The bridge is a large steel arch bridge, and the water is calm. The sky is a soft, hazy blue. The ferry has a yellow railing and a yellow structure. The text "New South Wales" is overlaid in the center of the image.

New South Wales

3.1 New South Wales

Sydney's recovery continued with strong growth in the services sector, particularly hospitality and transport. Regional growth was led by mining and transport.

NSW experienced a 3.7 per cent increase in GSP in 2022-23, led by strong growth in the services sector. Industries impacted by COVID-19 lockdowns early in 2021-22 have continued the recovery started in the latter half of that year, with the hospitality and transport sectors in particular experiencing strong growth.

Sydney's GRP grew by 3.9 per cent, an increase on the 1.5 per cent growth seen in 2021-22. The main driver of growth was Accommodation and Food Services, up by 37.6 per cent.

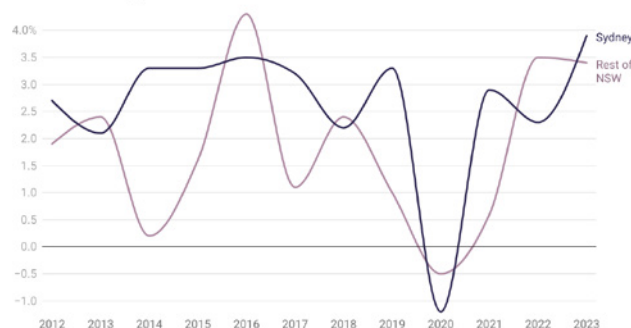
Other contributors to growth include Professional, Scientific and Technical Services (+5.1 per cent), Construction (+8.0 per cent), and Information, Media, and Communications (+10.6 per cent).

The greatest detractors to growth were Financial and Insurance Services (-0.7 per cent) and Rental, Hiring and Real Estate (-1.9 per cent), partly due to reduced turnover in the Sydney residential real estate market.

Regional NSW grew by 3.4 per cent, led by increases in Mining (+8.5 per cent), Transport, Postal and Warehousing (+30.6 per cent), and Financial and Insurance Services (+34.9 per cent).

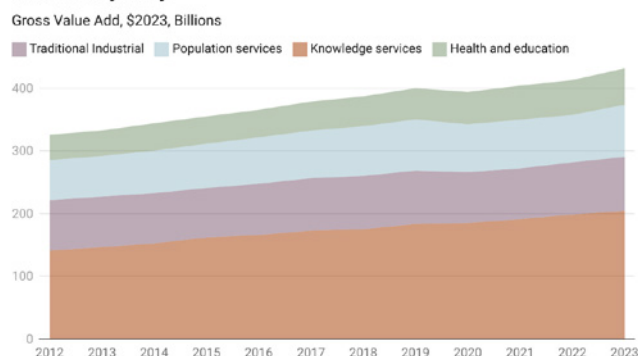
Wholesale Trade and Construction were the largest detractors to growth in Regional NSW, contracting by 18.8 per cent and 7.4 per cent, respectively. This is likely due to the movement of work into the city, particularly in the case of Construction.

Annual GDP growth



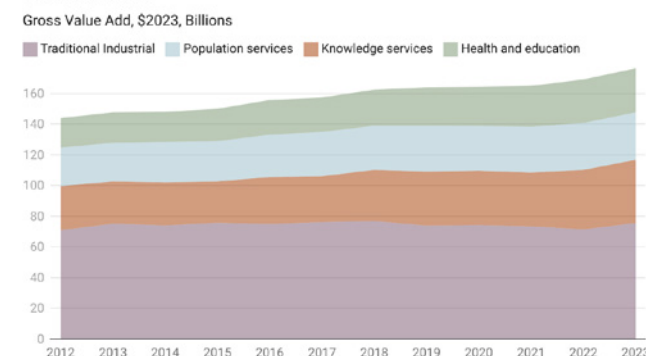
Source: SGS Economics and Planning, 2024

Greater Sydney



Source: SGS Economics and Planning, 2024

Rest of NSW



Source: SGS Economics and Planning, 2024

The areas with the highest levels of wellbeing in New South Wales were all located within the Greater Sydney area, particularly in the north of the city: North Sydney, Lane Cove, the Northern Beaches, and in the City of Sydney.

Regional areas with the highest wellbeing were Wingecarribee, the Blue Mountains, and Queanbeyan-Palerang. The drivers differed by LGA, but were commonly due to higher scores on Environmental, Income & Wealth, and the Equality, Community & Work Life Balance dimensions.

Overall wellbeing was lowest in the far west and northern regions, including Walgett, Moree Plains, Coonamble, and Narromine.

The spatial divide in wellbeing across the state is most pronounced in the Health dimension. An individual living in Greater Sydney has a life expectancy at birth of 84.3 years compared to 81.7 years in regional NSW. Although the average life expectancy in NSW has increased overall since 2016, a life expectancy gap of around 2.6 years persists between metropolitan and regional residents. Regional residents were also more likely to be living with two or more chronic health conditions.

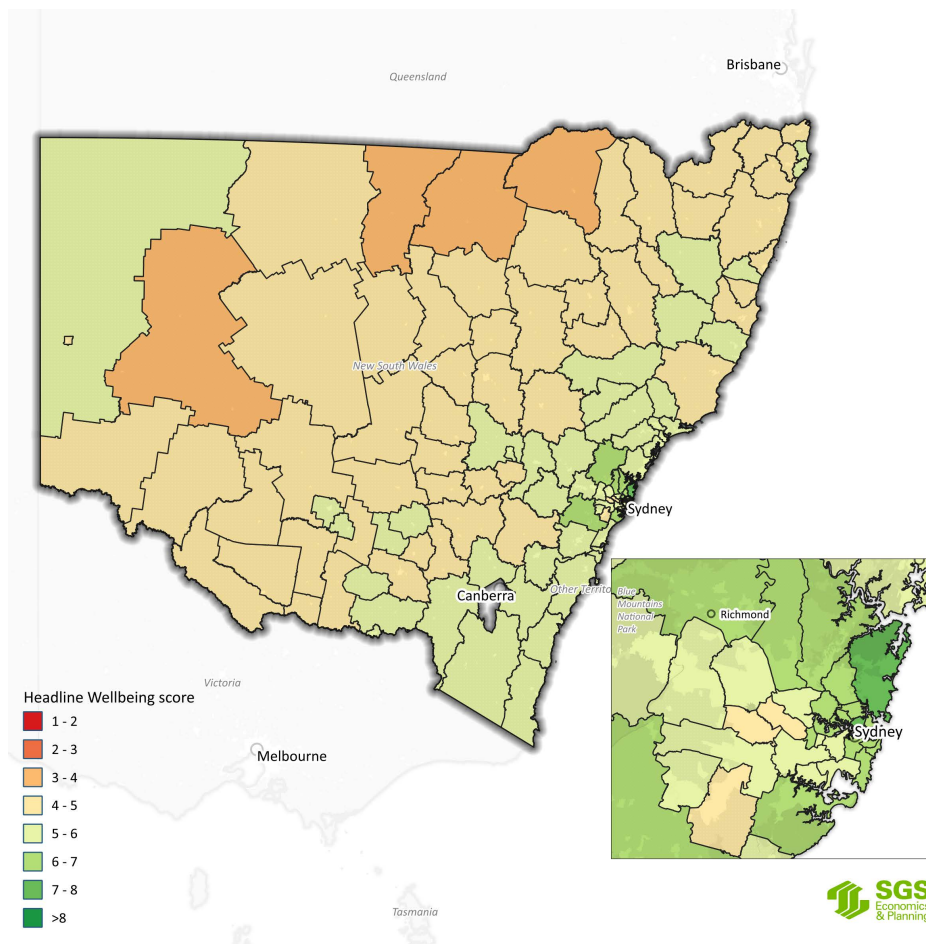
The Income & Wealth dimension highlighted the urban-regional disparities between median household income and house values (a primary driver of household wealth). Both measures were significantly higher in Greater Sydney compared to the rest of NSW. However, a higher proportion of regional residents owned their homes outright.

High rates of homelessness, overcrowding, and low rental affordability in Greater Sydney led to the Rest of NSW performing better on the Housing dimension. SGS's 2023 Rental Affordability Index reports that rental affordability in Greater Sydney rapidly declined in 2023 to its lowest point since 2017. The picture is varied in the regions, given their diversity of socio-economic profile and housing markets.

The Rest of NSW also performed better than Greater Sydney on the Environmental dimension and similarly on Equality, Community & Work Life Balance.

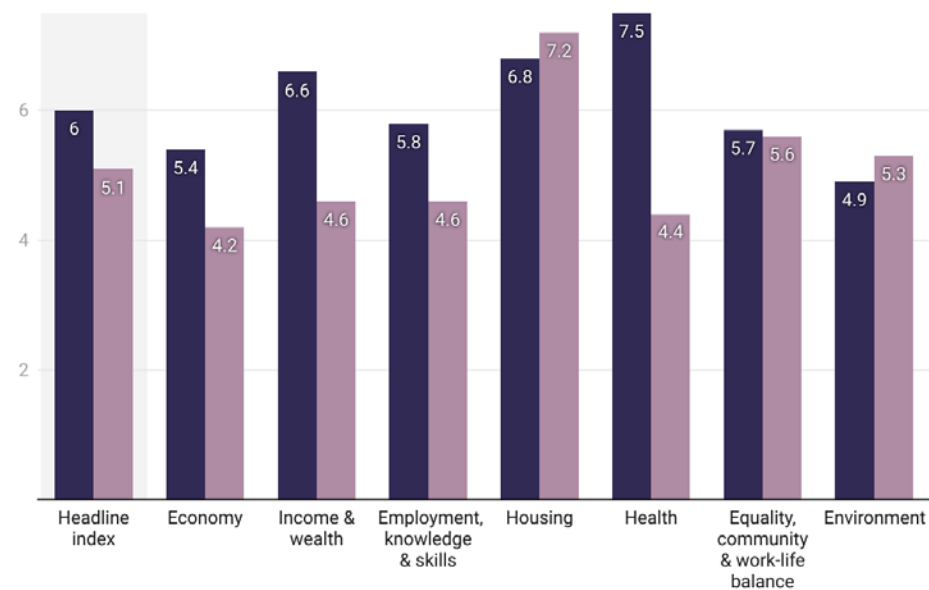
See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.





New South Wales

Greater Sydney Rest of NSW



Source: SGS Economics and Planning, 2024

A young couple is walking across a city street. The woman, with long reddish-brown hair, is smiling and looking towards the man. The man, with blonde hair, is looking off to the side. They are both dressed in casual attire. In the background, the grand, ornate architecture of Flinders Street Station in Melbourne is visible, featuring a large central dome and arched windows. The street is wide and appears to be a pedestrian crossing area. The overall atmosphere is bright and pleasant.

Victoria

3.2 Victoria

Strong growth in Melbourne, led by the hospitality and transport sectors, outweighed a marginal decline across Regional Victoria.

Victoria experienced a 2.6 per cent increase in GSP in 2022-23, led by increases in transport, hospitality, and health. The re opening of international borders saw increased demand for travel and events, while private health procedures continued to recover from reduced services during the pandemic.

Melbourne's GRP outpaced the state, growing by 3.6 per cent in 2022-23. This was led by increases in Transport, Postal and Warehousing (+16.6 per cent), Accommodation and Food Services (+33.8 per cent), and Administrative and Support Services (+13.7 per cent).

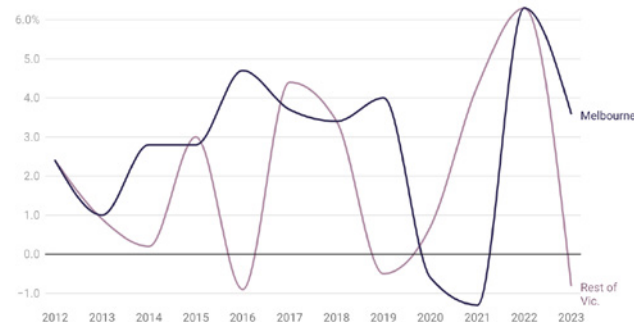
A decline in the Manufacturing industry (-4.1 per cent) was the largest detractor from Melbourne's growth, followed by Wholesale Trade (-1.4 per cent) and Electricity, Gas, Water and Waste Services (-2.7 per cent).

Regional Victoria's GRP contracted by 0.8 per cent in 2022-23. A reduction led this in Administrative and Support Services (-10.8 per cent), although this comes off the back of a period of strong growth (+19.8 per cent in 2020-21 and +22.7 per cent in 2021-22) and the industry remains elevated overall.

Other detractors in Regional Victoria include Mining (-6.1 per cent), Agriculture, Forestry and Fishing (-3.7 per cent) and Rental, Hiring and Real Estate (-18.3 per cent).

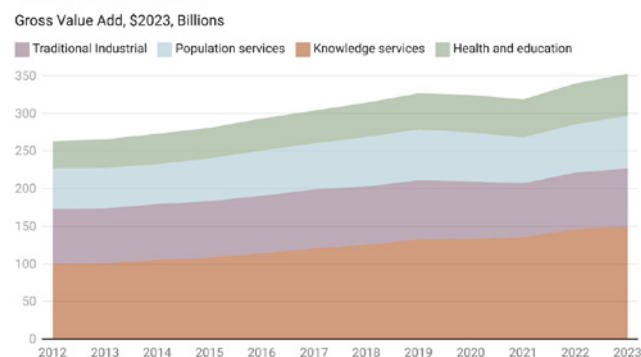
In dollar terms, Health Care and Social Assistance was the largest driver of growth in Regional Victoria (+5.7 per cent), followed by Information Media and Telecommunications (+27.6 per cent) and Arts and Recreation (+46.6 per cent).

Annual GDP growth



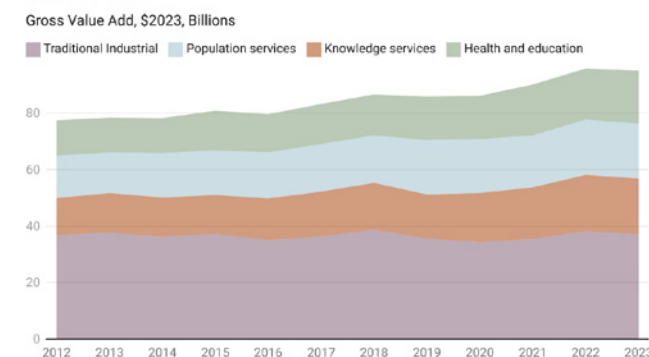
Source: SGS Economics and Planning, 2024

Greater Melbourne



Source: SGS Economics and Planning, 2024

Rest of Vic.



Source: SGS Economics and Planning, 2024

In Victoria, inner city areas of Greater Melbourne scored the highest overall on wellbeing (City of Melbourne, Yarra, Port Phillip). Nillumbik Shire Council in the outer northern suburbs also performed well. Regional areas with the highest wellbeing were the Surf Coast and Alpine regions.

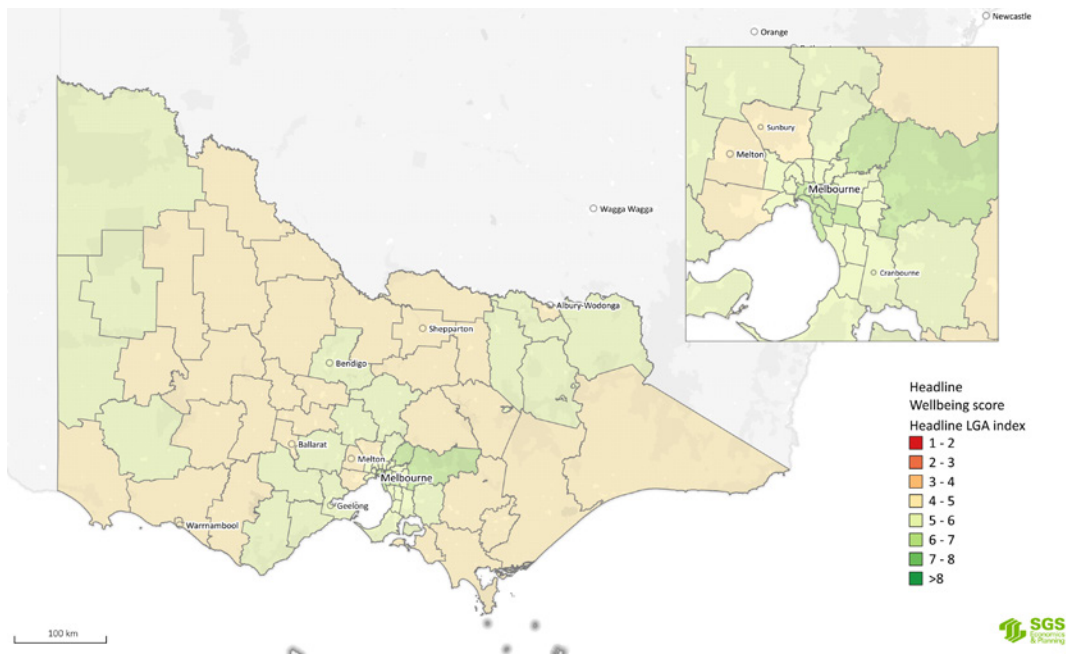
Overall wellbeing was lowest in the Loddon, Pyrenees, Buloke and Central Goldfields regions. This was generally due to lower scores on the following wellbeing dimensions: Employment, Knowledge & Skills, Health, and Income & Wealth.

In 2023, Greater Melbourne outperformed the Rest of Victoria in all wellbeing dimensions except for Environment. However, similar scores were observed in the Housing, and Equality, Community & Work Life Balance dimensions.

The urban-regional divide was largest in the Health and the Income & Wealth dimensions. There is a life expectancy gap of approximately 2.3 years between Greater Melbourne and Rest of Victoria residents, and a higher proportion of regional residents living with two or more chronic illnesses. Median household incomes and house values were also markedly higher in Greater Melbourne than in regional Victoria, although a smaller proportion of metropolitan residents own their homes outright.

See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.

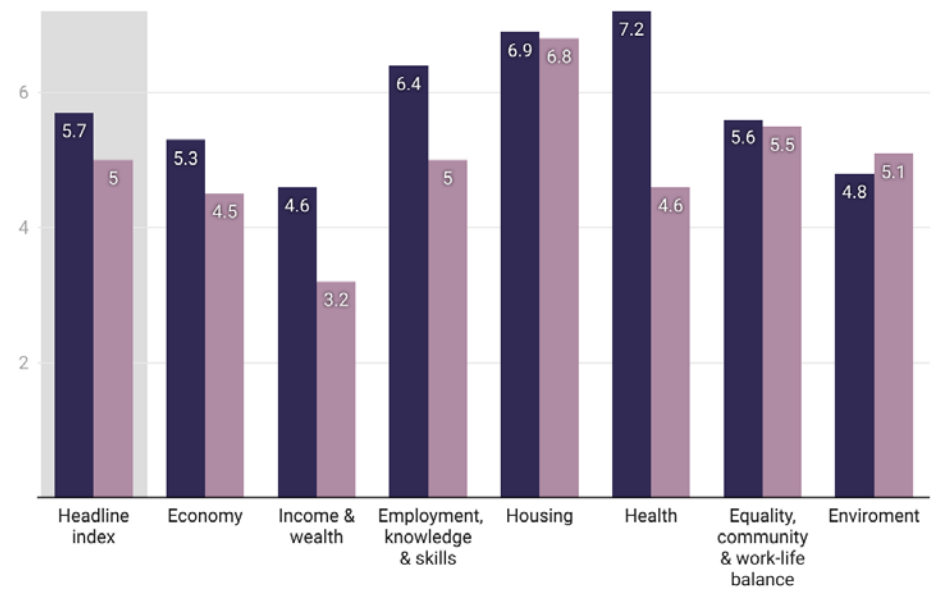




Source: SGS Economics and Planning, 2024

Victoria

Greater Melbourne Rest of Vic.



Source: SGS Economics and Planning, 2024

A person with long brown hair, wearing a light-colored wide-brimmed hat and a denim jacket, is seen from behind, leaning on a metal railing. They are looking out over a body of water towards a large steel truss bridge illuminated with warm lights. The sky is a mix of orange, pink, and blue, suggesting sunset or sunrise. A small boat is visible on the water to the left, and a tall building is on the far left. The word "Queensland" is written in white, bold, sans-serif font across the middle of the image.

Queensland

3.3 Queensland

Brisbane outpaced the regions, led by strong growth in transport, professional services, and hospitality. In regional Queensland, a decline in mining production was outweighed by growth in other sectors, particularly transport, public administration, and agriculture.

Queensland saw a 2.3 per cent increase in GSP in 2022-23. This was primarily led by strong growth in the transport sector, which outweighed a decline in mining outputs across regional Queensland.

Brisbane's GRP grew by 2.8 per cent, primarily driven by increases in Transport, Postal and Warehousing (+14.8 per cent) and Professional, Scientific and Technical Services (+8.1 per cent).

Reductions in Public Administration and Safety (-6.2 per cent) and Retail Trade (-2.1 per cent) were the primary detractors of Brisbane's growth.

Regional Queensland grew by 2.0 per cent, led by increases in Transport, Postal and Warehousing (+21.4 per cent), Public Administration and Safety (+16.1 per cent) and Agriculture, Forestry and Fishing (+8.9 per cent).

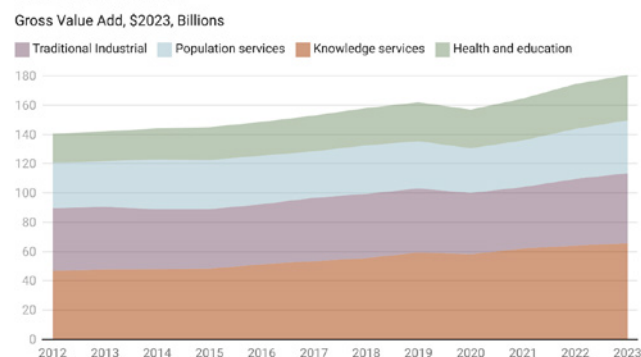
A significant decline in Mining (-4.0 per cent) was the main detractor from growth in Regional Queensland. This was driven by reduced coal production and exports throughout the year, largely due to maintenance and wet weather conditions.

Annual GDP growth



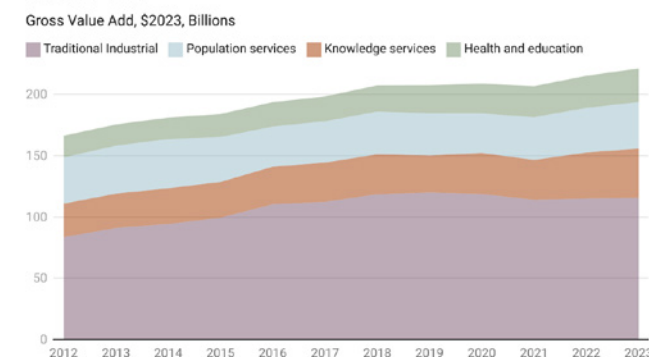
Source: SGS Economics and Planning, 2024

Greater Brisbane



Source: SGS Economics and Planning, 2024

Rest of Qld.



Source: SGS Economics and Planning, 2024

In Queensland, the areas with the highest wellbeing in 2023 were geographically dispersed: the Brisbane City, Noosa, Douglas, and Redland.

The areas with the lowest wellbeing scores were in Yarrabah, Palm Island, and the Northern Peninsula area. These locations tended to score poorly on the Economic, Employment, Knowledge & Skills, and Income & Wealth dimensions of wellbeing.

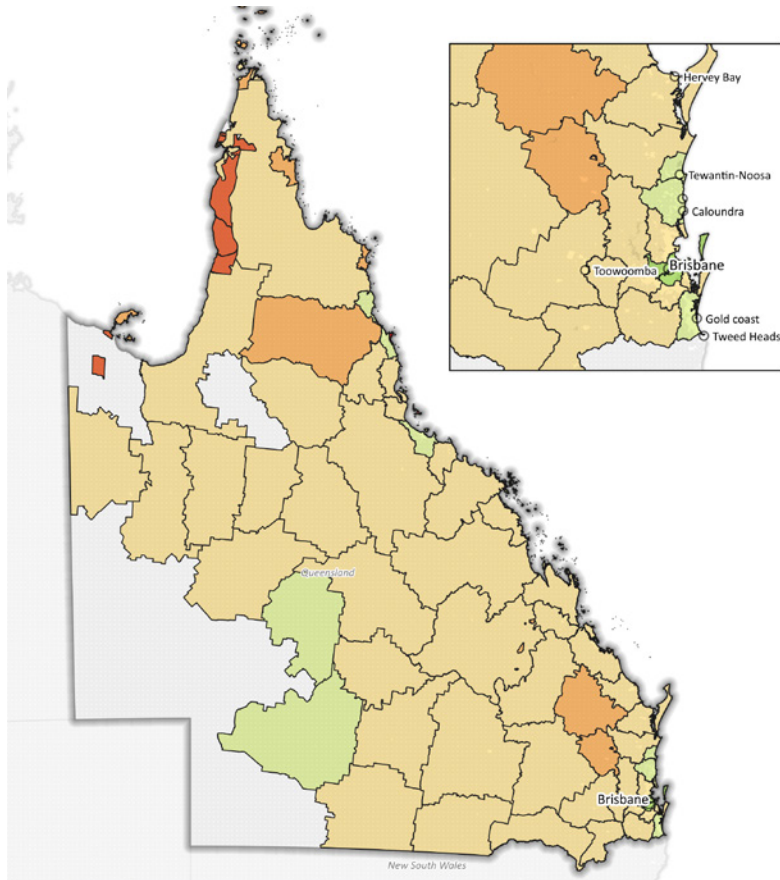
Queensland's spatial divide in the Economic dimension is the largest of all States and Territories. However, this is partially due to the geography of the capital city region, which accounts for only 9 per cent of all LGAs in Queensland. As Brisbane City's GRP is high at \$143.9 billion, it also dominates the capital city area's economic performance.

A large distinction is also observed between Greater Brisbane and the Rest of Queensland in the Employment, Knowledge & Skills and Health dimensions.

The Rest of Queensland performed similarly to Greater Brisbane on the Housing and Equality, Community & Work Life balance dimensions.

See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.



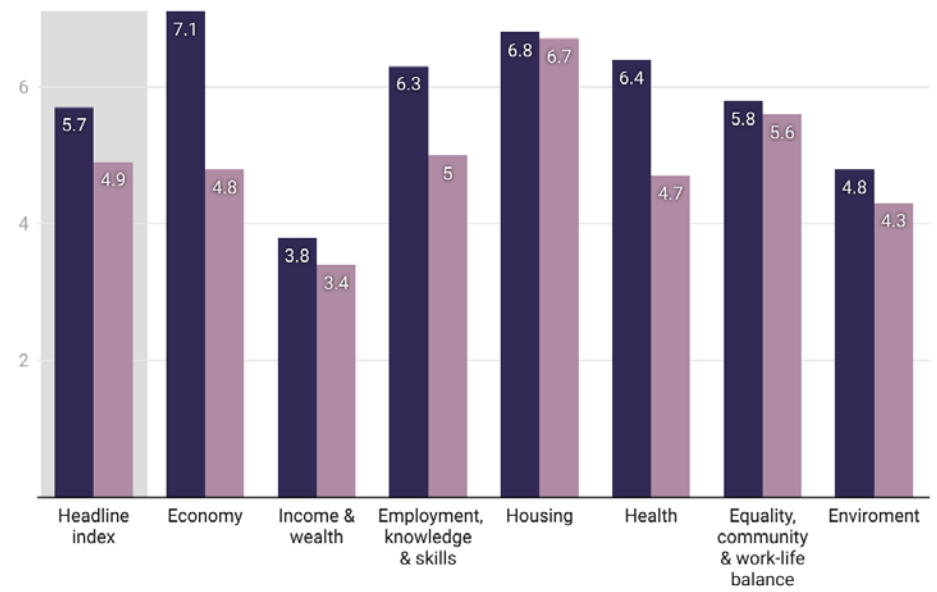


Source: SGS Economics and Planning, 2024



Queensland

Greater Brisbane Rest of Qld



Source: SGS Economics and Planning, 2024

A photograph of a man with dark, curly hair and a beard, smiling at the camera. He is wearing a dark blue jacket and is standing in a vineyard. He is holding onto a wooden post with his right hand. The background is filled with green grapevines and leaves, creating a lush, natural setting. The text "South Australia" is overlaid in white, bold, sans-serif font across the center of the image.

South Australia

3.4 South Australia

Regional South Australia was the fastest growing sub-region in Australia, led by increased mining and agricultural outputs. Adelaide benefited from an increase in tourism and strong growth in the construction sector.

South Australia’s GSP increased by 3.8 per cent in 2022-23, with all industries recording positive growth through the year. Mining, hospitality, and agriculture were the largest contributors, reflecting an increase in tourism and greater production of key commodities and agricultural goods.

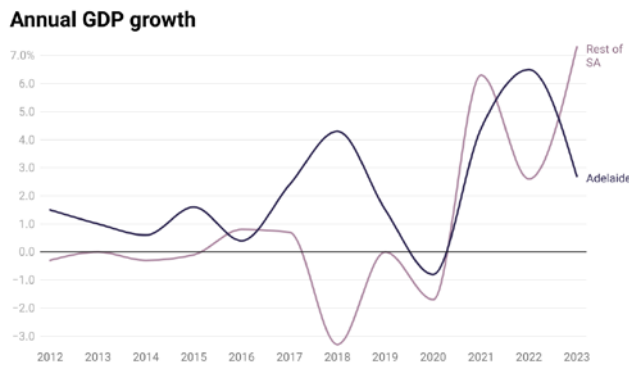
Adelaide’s GRP grew by 2.7 per cent, primarily led by increases in Construction (+9.0 per cent) and Accommodation and Food Services (+19.9 per cent).

Growth in the hospitality sector is due to record-breaking tourism spending in Adelaide, driven in part by the city hosting new major events. Wholesale Trade was the main detractor to growth, falling by 10.8 per cent through the year.

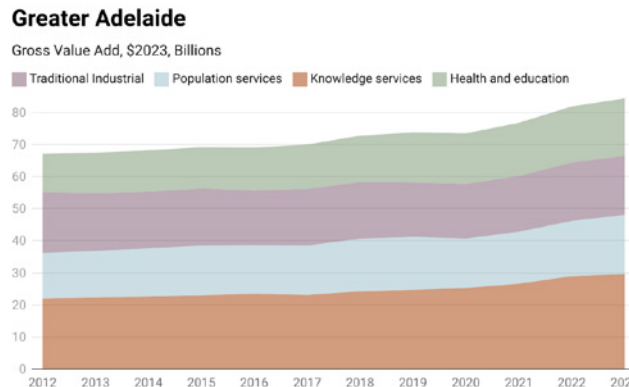
Regional South Australia outpaced the city, growing by 7.3 per cent in 2022-23. This was led by increases in Mining (+14.8 per cent), Wholesale Trade (+10.2 per cent) and Agriculture, Forestry and Fishing (+10.2 per cent).

The region’s strong performance was largely due to increased production and export of key commodities and agricultural goods. Increased copper production drove mining growth, while a record grain harvest increased agricultural exports.

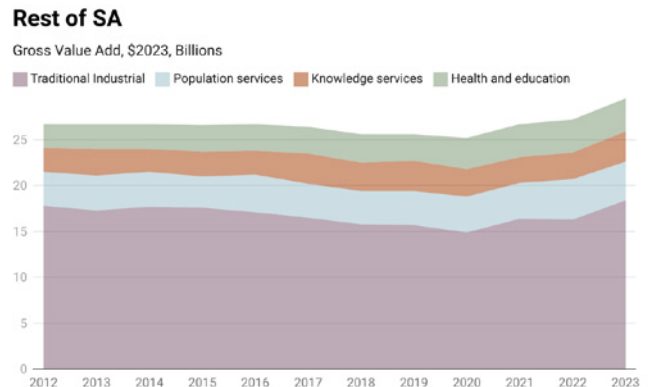
The main detractors to growth in Regional South Australia were Construction (-13.0 per cent) and Rental, Hiring and Real Estate Services (-61.0 per cent).



Source: SGS Economics and Planning, 2024



Source: SGS Economics and Planning, 2024



Source: SGS Economics and Planning, 2024

The areas with the highest wellbeing in South Australia were in Greater Adelaide: Mitcham, Burnside, Unley, and Adelaide Hills. These areas generally scored highly on the Health, Employment, Knowledge & Skills, and Equality, Community & Work Life Balance dimensions.

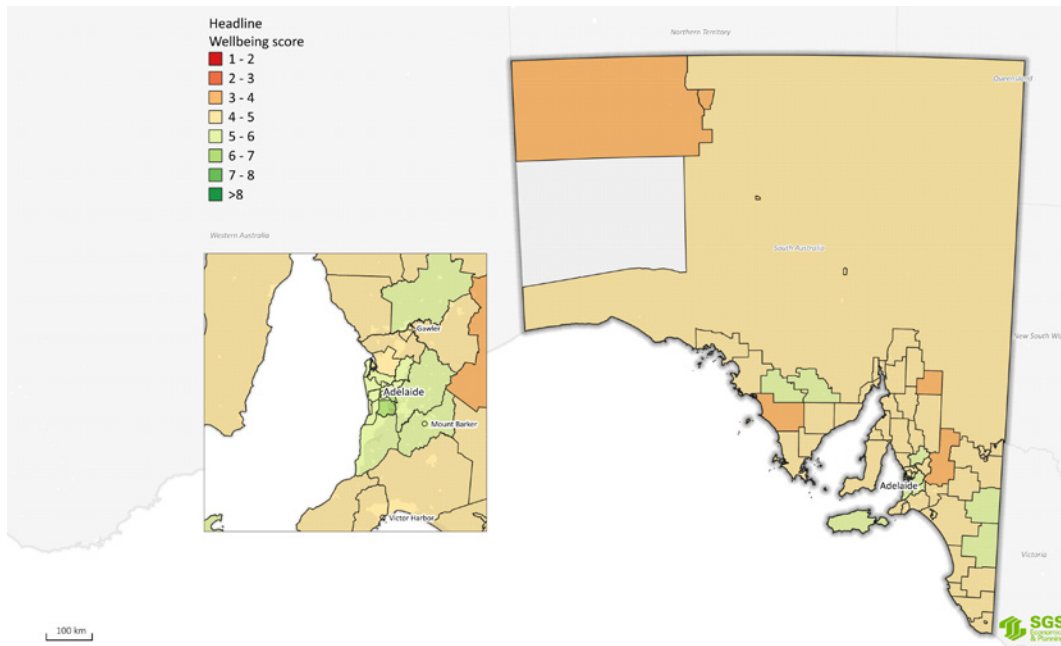
Several coastal cities performed poorly on wellbeing: Yorke Peninsula and Port Augusta, as well as Mid Murray and the remote north-western region of Anangu Pitjantjatjara Yunkunytjatjara.

In South Australia, the spatial divide in wellbeing outcomes is largest in the Health (due to the life expectancy gap and prevalence of multiple chronic health conditions) and in the Employment, Knowledge, & Skills dimensions. This was because, on average, a much lower proportion of South Australian regional residents were in the labour force, were in full-time or part-time employment, or had attained a Certificate III or higher.

The Rest of South Australia performed slightly better than Greater Adelaide in the Housing and Environment dimensions. On average, Greater Adelaide and the Rest of South Australia performed similarly on Equality and, Community & Work Life Balance.

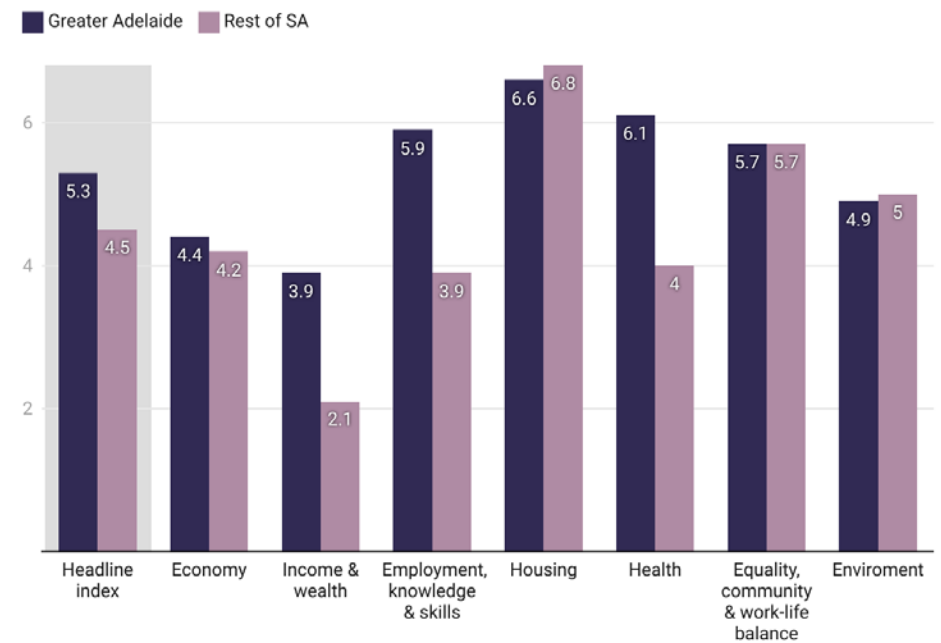
See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.





Source: SGS Economics and Planning, 2024

South Australia



Source: SGS Economics and Planning, 2024

A photograph of two people standing on a rocky hillside, looking out over a vast, flat landscape. The person in the foreground is wearing a light green shirt, blue jeans, and a red cap. The person behind them is wearing a green shirt, dark shorts, and a camouflage hat. The landscape is covered in low-lying vegetation and scattered rocks. In the distance, a body of water is visible under a clear blue sky.

Western Australia

3.5 Western Australia

Increased mining production headlined growth in Western Australia, particularly in the regions. Perth was boosted by the continued recovery in passenger transport, as well as increased demand for construction and professional services.

Western Australia’s GSP grew by 3.5 per cent in 2022-23, led primarily by strong growth in the mining sector.

Perth’s GRP grew by 4.1 per cent, with the main contributors being Transport, Postal and Warehousing (+18.9 per cent), Construction (+7.2 per cent) and Professional, Scientific and Technical Services (+6.6 per cent).

Reductions in Rental, Hiring and Real Estate Services (-4.9 per cent) and Accommodation and Food Services (-0.8 per cent) were the only detractors of growth.

Regional Western Australia grew by 3.0 per cent in 2022-23. This was driven by significant growth in the mining sector (+3.4 per cent), which accounted for over 78 per cent of the region's growth. Record production of iron ore led to this result, while increased production of lithium and nickel also contributed.

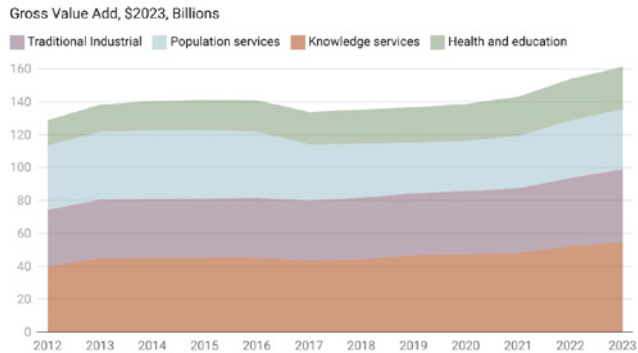
Other contributors to growth in Regional Western Australia include Rental, Hiring and Real Estate—which grew by 123.5 per cent as a result of increased turnover in the real estate market—and Agriculture, Forestry and Fishing (+7.3 per cent)—which was driven up by strong agricultural harvests and record levels of exports of goods such as cereals and grains.

Annual GDP growth



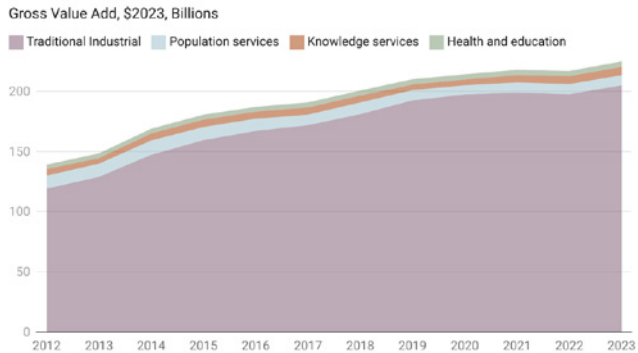
Source: SGS Economics and Planning, 2024

Greater Perth



Source: SGS Economics and Planning, 2024

Rest of WA



Source: SGS Economics and Planning, 2024

The best performing regions in Western Australia were in Greater Perth: Cambridge, Perth, Cottesloe, and Nedlands. The coastal tourist town of Exmouth was the top performing regional LGA.

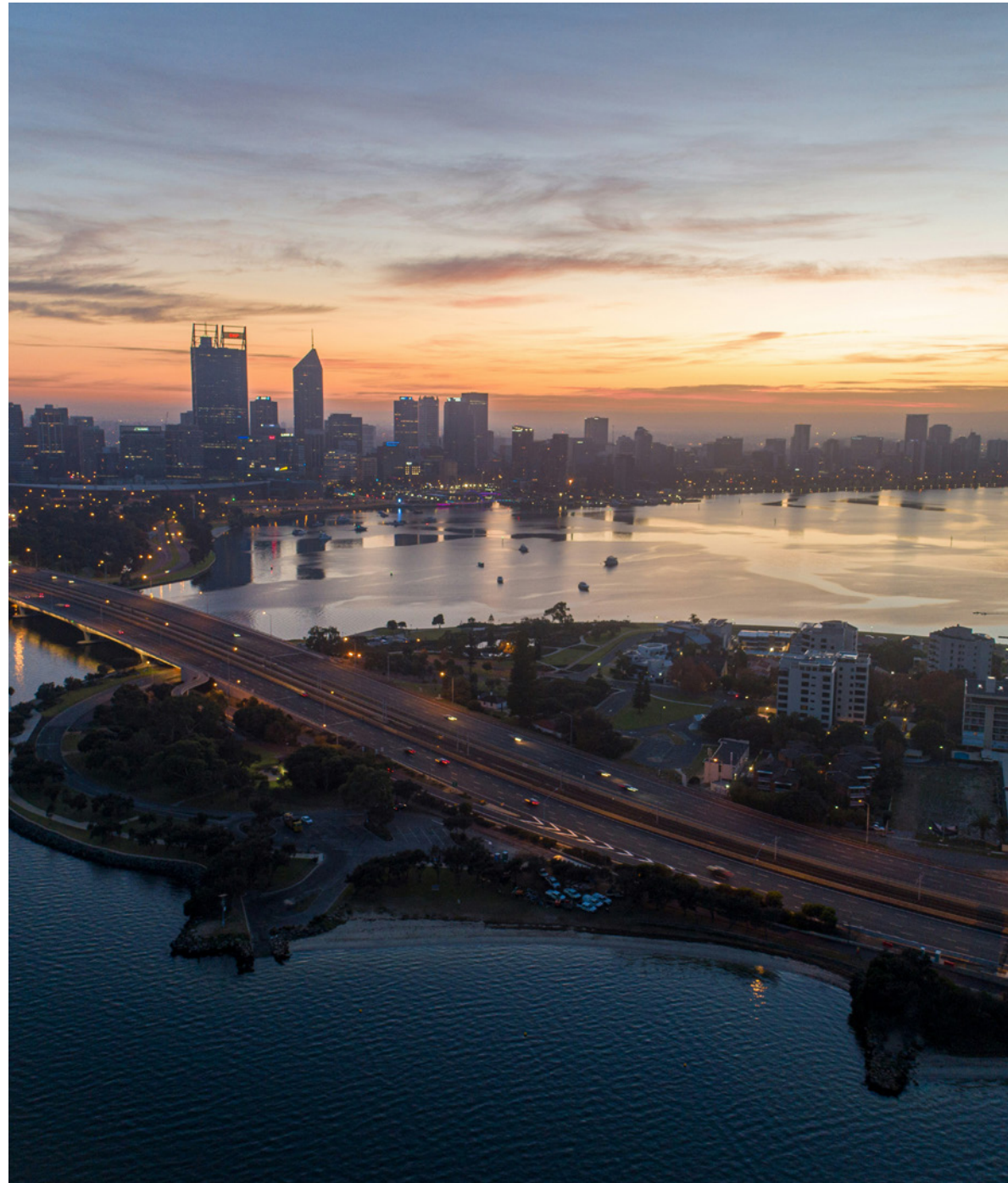
The lowest performing regions were mostly located in remote north of the state: Derby-West Kimberley and Halls Creek, as well as Coolgardie to the east of Perth.

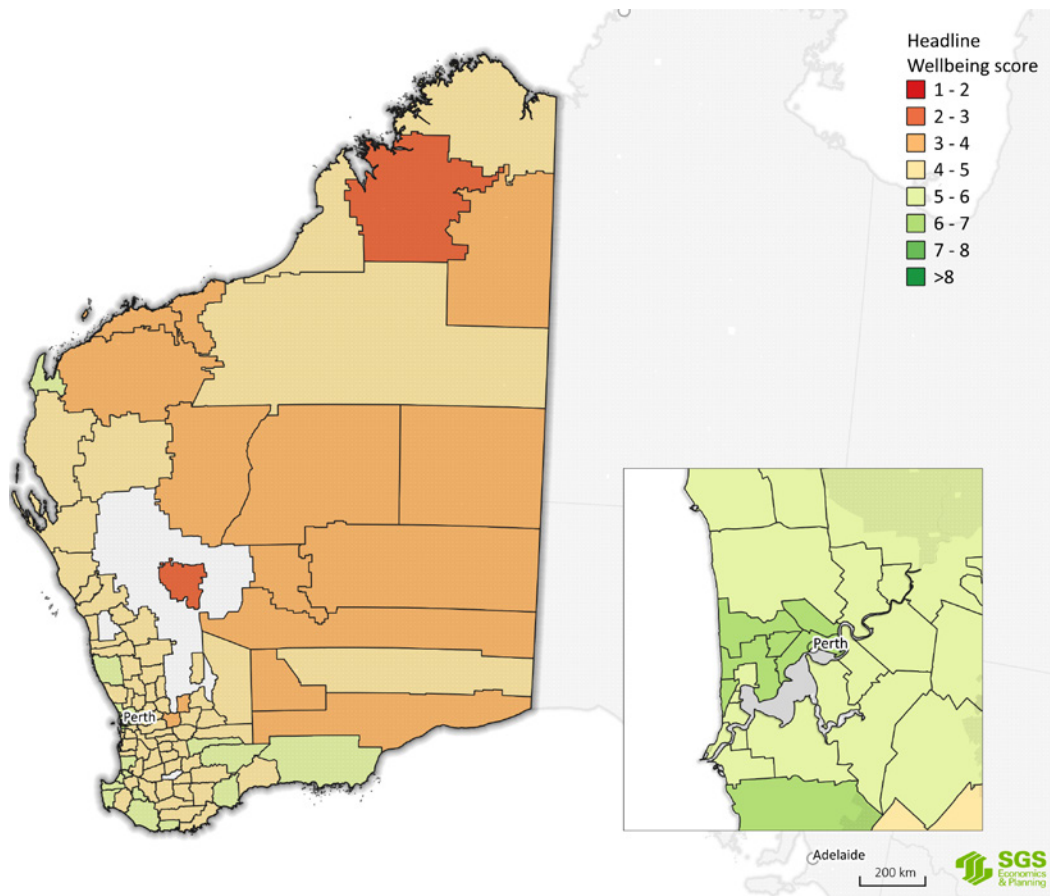
In Western Australia, the urban-regional divide is largest in the Health, Income & Wealth, and Employment, Knowledge & Skills dimensions. Drivers of this wellbeing gap include:

- A life expectancy gap between Greater Perth and Rest of Western Australia residents of almost 3 years, an increase from 2.2 years in 2015-17
- A higher proportion of Greater Perth compared to the Rest of Western Australia residents who are in the workforce, in full- or part-time employment, and who have attained a Certificate III or higher qualification
- On average, Greater Perth has a higher median household income, higher house prices, and higher house equity than the Rest of Western Australia.

On average, the Rest of Western Australia outperformed Greater Perth on the Housing and Environment dimensions.

See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.

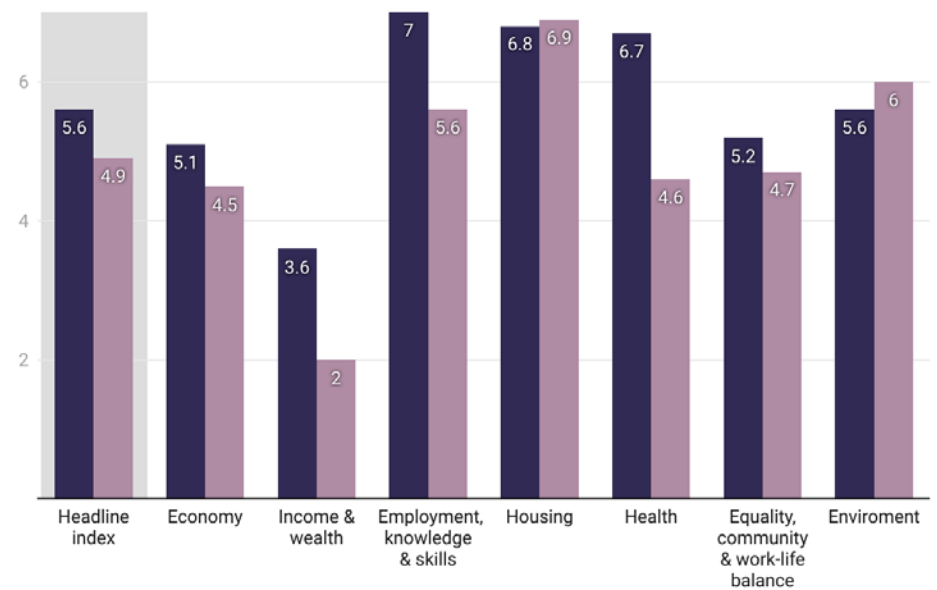




Source: SGS Economics and Planning, 2024

Western Australia

Greater Perth Rest of WA



Source: SGS Economics and Planning, 2024

A person with dark hair, wearing a yellow and brown jacket and dark pants, is sitting on a rocky outcrop. They are looking out over a large, calm lake. In the background, there are rugged mountains with sharp peaks under a blue sky with white clouds. The foreground shows some greenery and a small stream or inlet. The word "Tasmania" is written in white text across the middle of the image.

Tasmania

3.6 Tasmania

Growth in services sector, particularly in transport, hospitality, and health, outweighed a decline in agriculture and wholesale trade.

Tasmania experienced a 1.1 per cent increase in GSP in 2022-23. This was driven primarily by the services sector, particularly a continued recovery in the visitor market which led to strong growth in transport and hospitality.

Transport, Postal and Warehousing was the largest contributor to growth (+25.8 per cent), followed by Accommodation and Food Services (+19.9 per cent) and Health Care and Social Assistance (+2.9 per cent).

A decline in Agriculture, Forestry and Fishing was the main detractor to growth (-6.7 per cent), although the industry remains elevated after two years of strong growth (+23.4 per cent in 2020-21 and +5.3 per cent in 2021-22).

Other detractors include Manufacturing (-6.9 per cent) and Wholesale Trade (-8.1 per cent).

Note: Capital city and rest of state GRP breakdown is not available for Tasmania as the state represents less than 5 per cent of Australia's economic output.

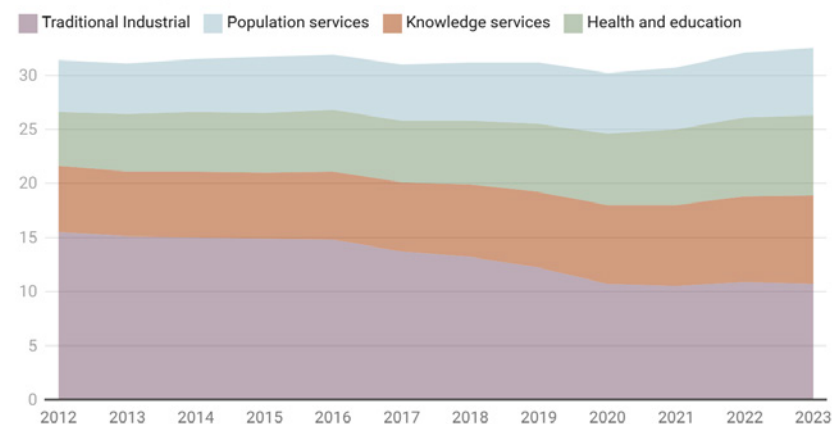
Annual GDP growth



Source: SGS Economics and Planning, 2024

Tasmania

Gross Value Add, \$2023, Billions



Source: SGS Economics and Planning, 2024

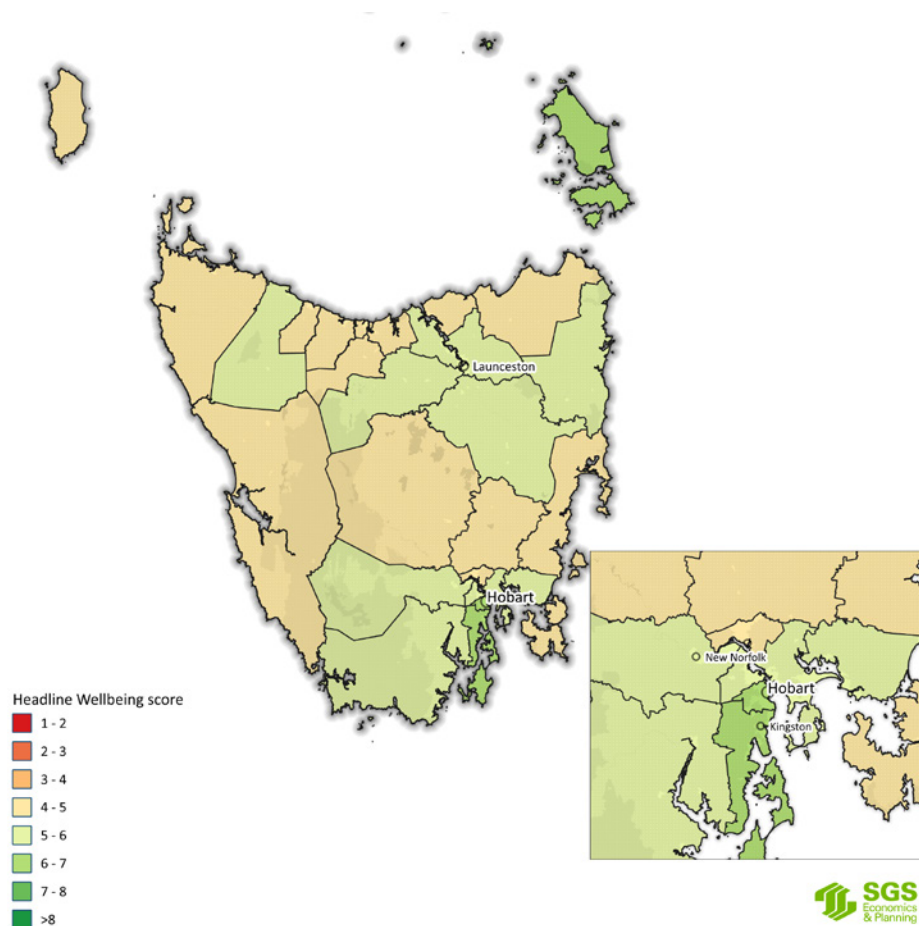
The best performing regions in Tasmania were in Greater Hobart: Hobart City and Kingborough. Outside of Hobart, the top performing regional areas were Meander Valley and Huon Valley.

The lowest performing regions were George Town, Devonport, and Brighton. These regions scored poorly on the Housing, Income & Wealth, and Employment, Knowledge & Skills dimensions of wellbeing.

As in other states, the spatial divide was largest in the Employment, Knowledge & Skills, Health, and Income & Wealth dimensions. Greater Hobart performed better than Rest of Tasmania on all dimensions, except for Environment where performance was similar.

See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.

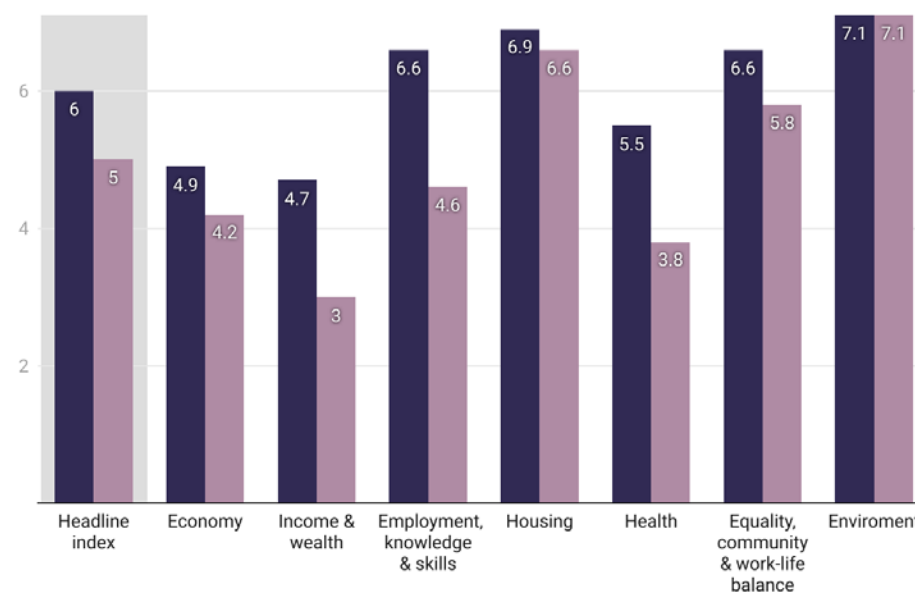




Source: SGS Economics and Planning, 2024

Tasmania

Greater Hobart Rest of Tas.



Source: SGS Economics and Planning, 2024

A young Indigenous Australian child with dark skin and curly hair is standing on a wooden bridge, smiling at the camera. The child is shirtless and wearing patterned shorts. A blue bicycle with a red seat and pink-rimmed wheels is positioned in front of the child. The bridge has yellow railings and a wooden deck. In the background, there are green trees and a blue sky with scattered clouds. The word "Northern Territory" is written in large white letters across the center of the image.

Northern Territory

3.7 Northern Territory

The Northern Territory was the only jurisdiction to experience a decline in GSP in 2022-23, led by a decrease in oil and gas production.

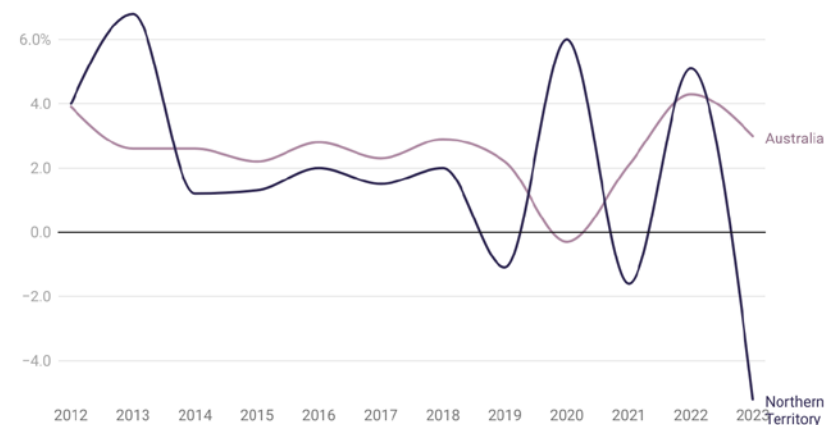
Northern Territory's GSP fell by 5.2 per cent in 2022-23, driven by a decline in mining outputs.

Mining GVA fell by 17.1 per cent through the year, a result of weaker production volumes of oil and gas.

The decline was partly offset by increases in Transport, Postal and Warehousing (+17.8 per cent) and Construction (+6.6 per cent).

Note: Capital city and rest of state GRP breakdown is not available for Northern Territory as it represents less than 5 per cent of Australia's economic output.

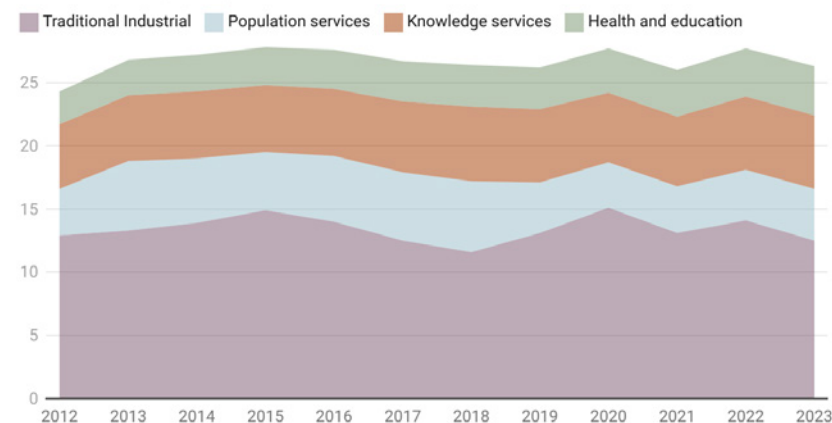
Annual GDP growth



Source: SGS Economics and Planning, 2024

Northern Territory

Gross Value Add, \$2023, Billions



Source: SGS Economics and Planning, 2024

The areas with the highest levels of wellbeing in the Northern Territory were in Greater Darwin: Litchfield, Darwin, and Palmerston. Alice Springs and Katherine were among the top performing regional areas.

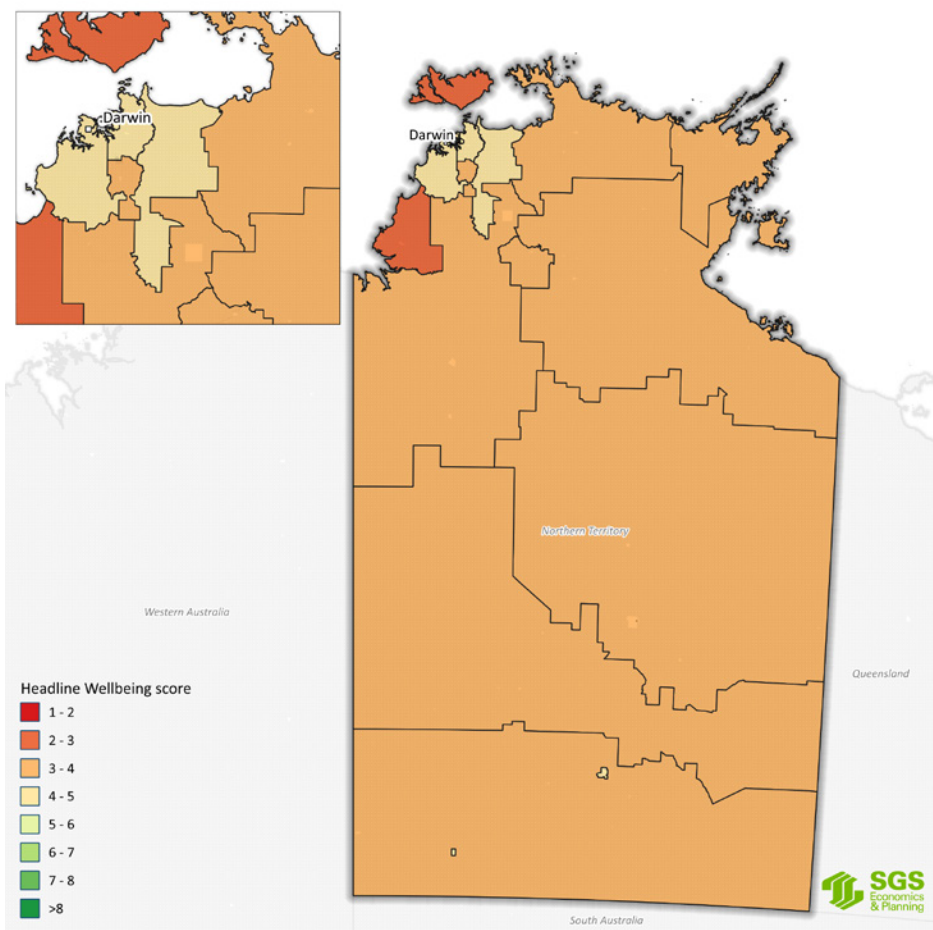
The urban-regional wellbeing divide in the Northern Territory is largest in the Employment, Knowledge & Skills dimension. Many regional areas of the Northern Territory have among the lowest rates of higher educational attainment, employment, and workforce participation.

On average, the Rest of Northern Territory performed significantly better than Greater Darwin on the Environment dimension.

The Rest of Northern Territory areas that performed well (Alice Springs, Katherine, and Unincorporated NT) performed reasonably well on the Equality, Community & Work Life Balance and the Economy dimensions.

See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.

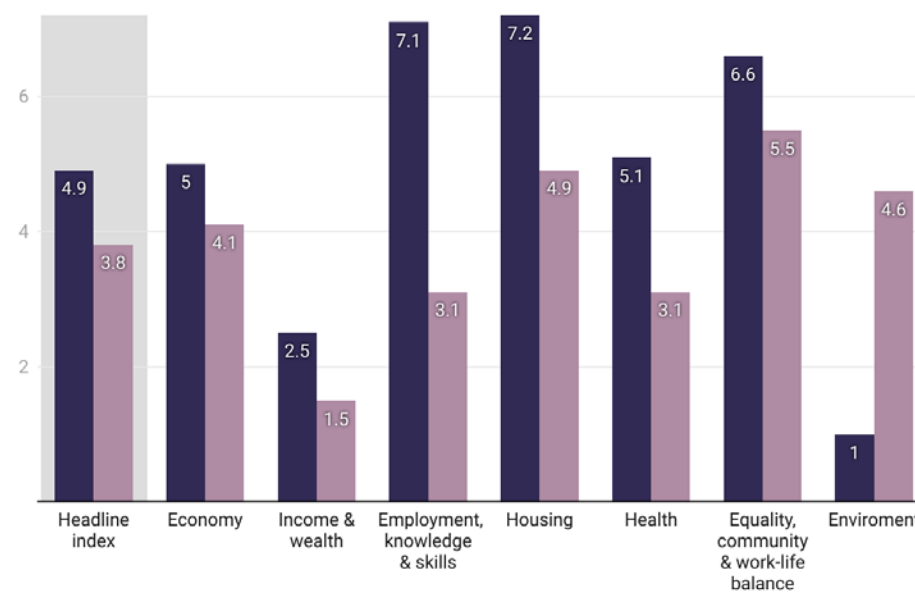




Source: SGS Economics and Planning, 2024

Northern Territory

Greater Darwin Rest of NT



Source: SGS Economics and Planning, 2024



Australian Capital Territory

3.8 Australian Capital Territory

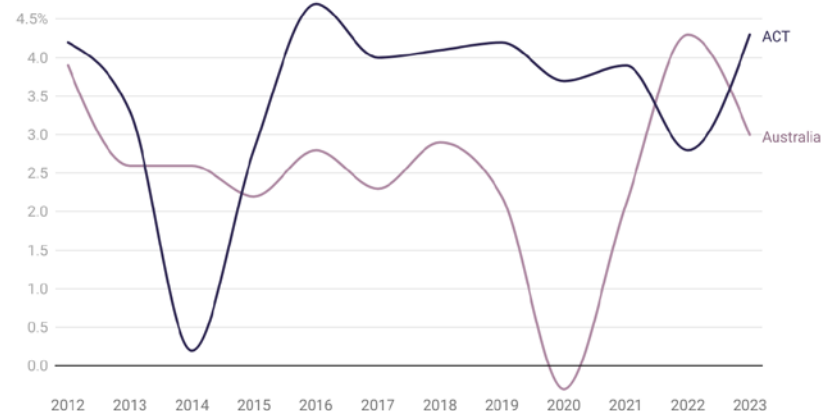
The Australian Capital Territory was the fastest growing jurisdiction in 2022-23, increasing by 4.3 per cent through the year, primarily due to growth in public administration.

The ACT grew by 4.3 per cent in 2022-23, making it the fastest growing of all states and territories. This result was led by strong growth in Public Administration and Safety (+4.3 per cent), reflecting new Commonwealth Government policies.

Other sectors contributing to growth include Professional, Scientific and Technical Services (+4.3 per cent), Accommodation and Food Services (+24.1 per cent), and Information Media and Telecommunications (+9.2 per cent).

Note: Capital city and rest of state GRP breakdown is not available for the ACT as it represents less than 5 per cent of Australia's economic output.

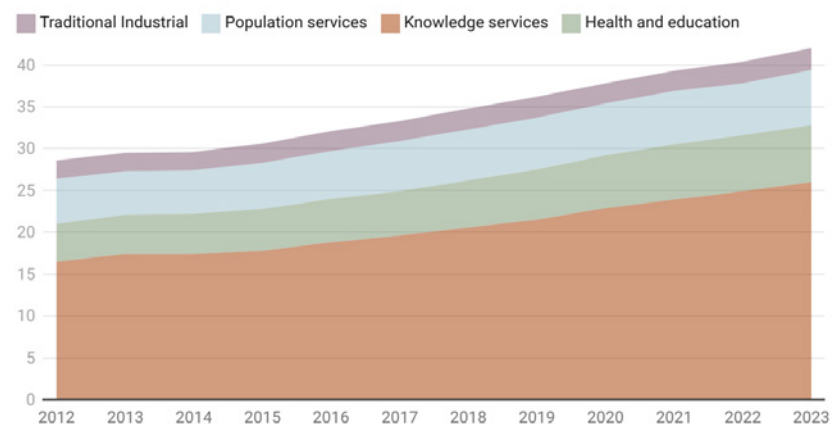
Annual GDP growth



Source: SGS Economics and Planning, 2024

Australian Capital Territory

Gross Value Add, \$2023, Billions



Source: SGS Economics and Planning, 2024

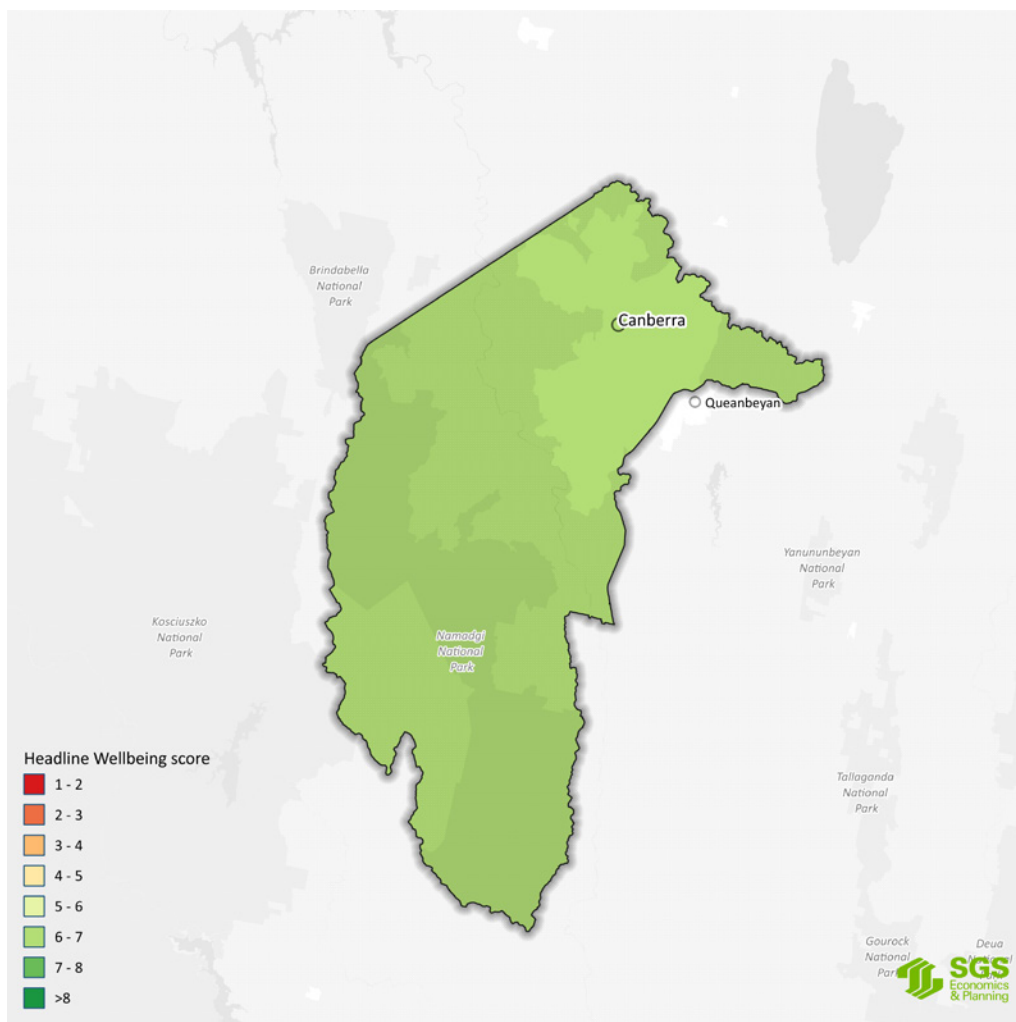
The Australian Capital Territory was the best performing region in Australia, scoring in the top ten nationally in several wellbeing dimensions (Economy, Environment, and Equality, Community, & Work Life Balance).

In 2023, the Australian Capital Territory was the highest performing region nationally in labour productivity and scored fourth highest on GRP. Notwithstanding the region's performance against these indicators, the Australian Capital Territory scored poorly on the entropy index (a measure of the diversity of economic activity) due to its concentration of public administration jobs.

The Australian Capital Territory performed less well on the Income & Wealth and Environmental dimensions relative to other wellbeing dimensions. The Australian Capital Territory's performance on the Income and Wealth indicators was mixed. The region performed well nationally on the median household income and house price indicators, and less well on the proportion of dwellings owned outright and house equity indicators.

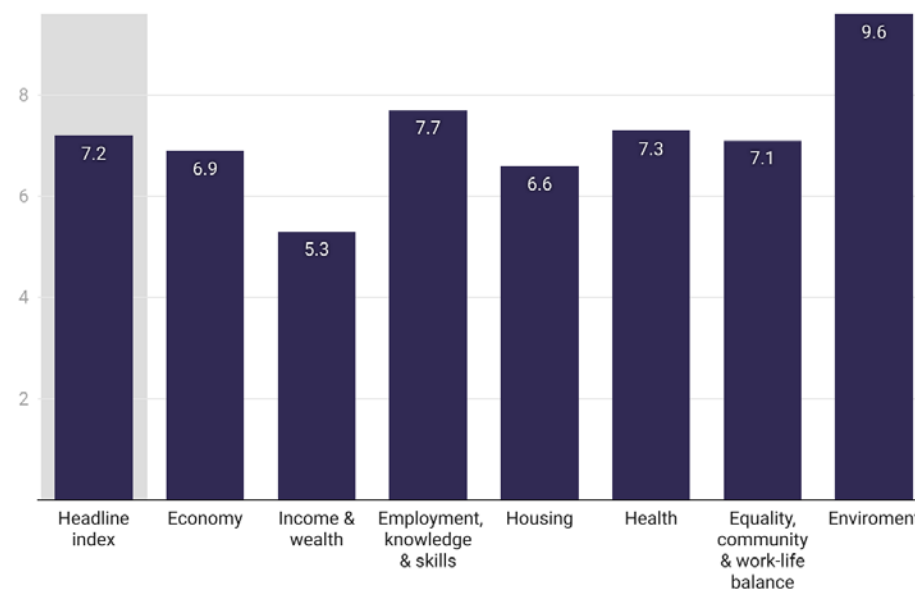
See the [interactive dashboard](#) for a detailed breakdown of wellbeing dimensions by LGA.





Source: SGS Economics and Planning, 2024

Australian Capital Territory



Source: SGS Economics and Planning, 2024

A man and a woman are sitting at a desk in a modern office, smiling and looking at their laptops. The man is on the left, wearing glasses and a light-colored shirt. The woman is on the right, wearing a purple top. The background features a large, abstract geometric sculpture made of wooden panels. The text "04 Technical Appendix" is overlaid in white at the bottom of the image.

04 Technical Appendix

Wellbeing Index Approach

Economy	A healthy local economy can create more job opportunities for residents, reducing unemployment and improving their financial stability. A strong local economy can lead to higher wages, better working conditions, and a greater variety of goods and services available, all of which can improve the standard of living for local residents.	→ GRP (\$m) → Labour productivity (\$) → Entropy index
Income & Wealth	Sufficient income is essential for access to basic needs such as food and shelter. Wealth can provide security and stability, which can reduce stress and anxiety, and enable access to education, employment, and discretionary products such as leisure activities, travel, and other forms of cultural enrichment.	→ Median household income → % dwellings owned outright (owner occupier) → House prices (thousands) → House equity (house prices * % own outright) (thousands)
Employment, Knowledge & Skills	Education provides the knowledge and skills that create better job opportunities and provides the tools that can help individuals deal with stress and overcome obstacles in life, and is positively associated with trust, civic engagement, and social networks and support. Stable employment results in financial stability, can provide a sense of purpose and identity, and opportunities to socialise.	→ % participation rate → % workforce employed → % pop with Cert III+
Housing	Having access to a stable and safe place to live is a basic human need. It provides a sense of security and belonging and supports an individual's access to social infrastructure, education and employment opportunities. On the other hand, living in overcrowded, poorly maintained, or unstable housing can contribute to feelings of insecurity, isolation, and depression. Housing also impacts economic wellbeing, as the cost of housing, including rent or mortgage payments, can make it difficult to afford other basic needs such as food and healthcare.	→ RAI 2023 → Homelessness per 100,000 → Persons in marginal housing per 100,000
Health	Chronic illness is a source of pain, stress and hardship and can contribute to depression and anxiety. It can also limit a person's ability to work and participate in other activities, which can have a negative impact on a person's social connections and financial wellbeing. Having a longer life expectancy can result in greater opportunities for personal growth and fulfillment, as well as greater social and economic prosperity.	→ Life expectancy → % 1 or no chronic health conditions
Equality, Community & Work Life Balance	Equality underpins individual and collective wellbeing. A sense of community can provide individuals with a sense of belonging, and a support network. While work-life balance is important for maintaining physical, mental and emotional wellbeing, it is also essential for a satisfying and healthy life.	→ Gender domestic work gap → FN emp gap ratio → M-F participation gap → Gender pay gap → % volunteer → Gini coefficient → % pop working <50hrs pw
Environment	The availability and quality of green spaces such as parks and reserves are an important input into wellbeing. Spending time in nature has been linked with better physical health, lower levels of stress and positive mental health more broadly. Yet environmental risks, such as bushfire and floods, are linked with lower levels of wellbeing. Disasters can result in a loss of livelihood, such as employment or housing. They can impact social cohesion by making it harder for communities to recover from and build resilience to future disasters.	→ Environmental hazards index → % land national park, reserve or protected

CRWI 2023 data refresh

Many of the CRWI indicators are based on the ABS Census of Population and Housing. The Census is the most comprehensive snapshot of Australia's socio-economic performance and how it is changing over time. The Census is conducted once every five years. This means that while some CRWI indicators are sourced directly from 2023 values, other indicators are derived using a tailored method, as follows:

1. Forecast 2023 values based on 2011-21 trend from the ABS Census of Population and Housing
2. Source new ABS data that reports indicators for 2021 and 2023 years
 - New data release available: Compare compound annual growth rate (CAGR) 2021-23 in new data with the 2011-21 CAGR based on ABS data and progress to Step 3
 - New data release not available: Use 2023 forecast from step 1 as value
3. Refine CAGR using an adjusted linear growth measure:
$$\text{CAGR(adjusted)} = 10 * (\text{ABS CAGR 2011-21})/12 + 2 * (\text{new dataset CAGR 2021-23})/12$$
4. Apply adjusted CAGR to 2021 ABS value by LGA.

LGAs with a population under 500 were also excluded from the analysis (26 LGAs), due to the reliability of reporting indicators where the population sample is small. The table below provides further information on each indicator and the source data.



Dimension	Indicator	Description	Source data
Economy	Gross Regional Product (\$m)	The total value of goods and services produced in a regional economy.	ABS Australian National Accounts: State Accounts 2022-23
Economy	Labour productivity	Output per hour worked.	ABS Labour Force ABS Australian National Accounts: State Accounts 2022-23
Economy	Entropy index	A measure of industry diversity in the region, as indicated by relative employment by industry. Lower scores indicate a lack of industry diversity and higher scores indicate high diversity in the industry of employment.	ABS Census – count of persons by Place of Work and Industry of Employment.
Income & Wealth	Median household income (\$)	Median of the distribution of income by households in the LGA.	ABS Census – Total household income (weekly)
Income & Wealth	Dwellings owned outright (%)	Proportion of dwellings in the LGA owned outright.	ABS Census – Count of dwellings by tenure type
Income & Wealth	House prices (thousands)	Annual median price of dwelling transfers (established house and attached dwellings) by GCCSA.	ABS Census – Total value of dwellings
Income & Wealth	House equity (thousands)	Total value of dwellings owned outright by LGA.	ABS Census – Count of dwellings by tenure type; ABS Total value of dwellings (12/3/24 release)
Employment, Knowledge & Skills	Participation rate (%)	Population aged 15+ years employed and unemployed but looking for work as a proportion of the working-age population.	ABS Census – Labour force status by age; ABS Labour Force Australia (22/2/24 release)
Employment, Knowledge & Skills	Employment rate (%)	Population aged 15+ years employed as a proportion of total labour force. The labour force comprises persons employed and unemployed but looking for work.	ABS Census – Labour force status by age; ABS Labour Force Australia (22/2/24 release)
Employment, Knowledge & Skills	Population with Cert III or above (%)	Proportion of population who have attained a Certificate III or higher qualification.	ABS Census – Level of highest educational attainment; ABS Education and Work in Australia (1/11/23 release)
Housing	Rental Affordability Index	A measure of rental affordability relative to household incomes. For more detail head to: https://sgsep.com.au/projects/rental-affordability-index	SGS Rental Affordability Index
Housing	Homelessness (per 100,000)	Number of persons living in improvised dwellings, tents, or sleeping out, plus persons in supported accommodation for the homeless.	ABS Census – Homelessness operational groups

Dimension	Indicator	Description	Source data
Housing	Persons in marginal housing (per 100,000)	Number of persons staying temporarily with other households, living in boarding houses, in other temporary lodgings, and severely crowded dwellings.	ABS Census – Homelessness operational groups
Health	Life expectancy (years)	Average number of additional years from birth a person may expect to live.	ABS Life expectancy by SA4
Health	Population 1 or no chronic health conditions (%)	Proportion of population reporting at most one health condition. For the list of long-term health conditions included in ABS' count, head to: https://www.abs.gov.au/census/guide-census-data/census-dictionary/2021/variables-topic/health/count-selected-long-term-health-conditions-clthp	ABS Census – Count of selected long-term health conditions; ABS National Health Survey (2017-18 to 2022)
Equality, Community & Work Life Balance	Gender domestic work gap	Ratio of total hours male persons spent in the week doing domestic work without pay relative to female persons.	ABS Census – Unpaid domestic work by number of hours and sex
Equality, Community & Work Life Balance	First Nations employment gap ratio	Ratio of First Nations employment rate to non-First Nations employment rate. Employed persons is the sum of full-time, part-time and employed but away from work.	ABS Census – Labour force status by Indigenous status
Equality, Community & Work Life Balance	Male-female participation gap	Ratio of males to females who are employed (full-, part-time, and employed but away from work) and unemployed but looking for full- or part-time work.	ABS Census – Labour force status by sex
Equality, Community & Work Life Balance	Gender pay gap	Population-weighted average difference between male and female weekly incomes as a proportion of weekly male income.	ABS Census – Total personal income (weekly) by sex; ABS Average Weekly Earnings (22/2/24 release)
Equality, Community & Work Life Balance	Population who volunteer (%)	Proportion of population spent time doing unpaid voluntary work for an organisation or group in the twelve months prior to Census night.	ABS Census – Voluntary work for an organisation or group
Equality, Community & Work Life Balance	Gini coefficient	Summary indicator of the degree of income inequality within a region. Lower values indicate lower inequality while higher values indicate higher levels of income inequality.	ABS Personal Income in Australia, Table 2 Total income distribution by geography 2020-21
Equality, Community & Work Life Balance	Population working <50 hours per week (%)	Proportion of population who work fewer than 50 hours per week.	ABS Census – Hours worked; ABS Labour Force Australia (22/2/24 release)
Environment	Environmental hazards index	A measure of region's historical exposure to natural hazards, including bushfire, flooding, earthquake, and storm.	SGS-calculated from economic study of natural risk regions
Environment	Land that is national park, reserve, or protected (%)	Proportion of total protected land area in a region. This includes Indigenous protected	ABS Data by region – Protected land areas

Method to estimating Gross Regional Product

There are three approaches to measuring Gross Domestic Product:

- **The Production Approach:** the sum of the Gross value added for each of the industries and taxes, less subsidies on products;
- **The Expenditure Approach:** measures final expenditure on goods and services; and
- **The Income Approach:** sum of income generated by all factors of production.

At the Australian level, the Production, Expenditure and Income approaches are averaged by the ABS to produce and estimate of GDP. However, at the State level, a lack of data on trade between the states results in the Expenditure and Income approaches being combined and averaged with the Production approach. The hybrid Expenditure and Income estimates of Gross State Product (GSP) have been published since the 1990s. The Production approach has only been estimated and published as part of the *Australian National Accounts: State Accounts (Cat. No. 5220.0) since 2007*.

In developing GDP¹ estimates for each major capital city (as defined by the capital city statistical divisions), the Production approach is used. This is used firstly because of the lack of data on interstate trade, and secondly because the data available to calculate the Production approach is more robust (and hence requires fewer assumptions to be made) than that available for the Expenditure or Income approaches. For each industry, wherever possible, the same data sources that have been used to produce industry gross value added at the state level are used to produce industry gross value added at the city level. Some of these data sources include:

- Agricultural Commodities: Small Area Data, Australia (Cat. No. 7125.0)
- Manufacturing Industry, Australia (Cat. No. 8221.0)
- Regional Population Growth, Australia (Cat. No. 3218.0)
- Household Expenditure Survey, Australia (Cat No. 6530.0)
- Education and Training Experience (Cat. No. 6278.0)
- Labour Force, Australia, Detailed, Quarterly (Cat. No. 6291.0.55.003).

Via the use of the implicit price deflation technique, the Chain Volume Measures of the industry gross value added are converted into current prices. This method overcomes the non-additivity issue with the Chain volume measure and allows the aggregation of industry estimates of GVA to overall GDP. In order to maintain consistency with the wider National Accounts, the Production Approach estimate of city GDP is benchmarked to the state GDP.

For deriving labour productivity, the estimates of hours worked are taken from *Information Paper: Implementing New Estimates of Hours Worked into the Australian National Accounts, 2006* (Cat. No. 5204.0.55.003) which provides the total hours worked within the economy for 2004-05. The index of total hours worked from the *Australian System of National Accounts, 2018-19* (Cat. No. 5204.0) has been used to advance the 2004-05 estimate for the years between 2005-06 and the most recent year. This Australian total hours worked figure has then been allocated for each industry in each capital city based on its share of total hours worked from the *Labour Force, Australia, Detailed, Quarterly (Cat. No. 6291.0.55.003)*.

¹GDP (Gross Domestic Product) refers to Australia, GSP (Gross State Product) refers to a State, while GCP (Gross City Product) refers to a city. However, for simplicity's sake in this paper all different measures are referred to as GDP.

4.1 Industry methods

The gross value added for each industry for Australia is derived in the annual supply and use tables using the double deflation technique. That is, subtracting estimates of intermediate input from estimates of output. Where possible the same data has been used in estimating State level industry gross value added. The details of this estimation method are outlined in “Information paper: Gross State Product using the Production approach GSP(P)”. In estimating the Capital City level industry gross value added, where possible, the same data sources have been used. The following section provides a summary of the data sources used to estimate gross value added for each industry. A quality assessment is also provided.

Agriculture, forestry and fishing

Method

Australian National Accounts: State Account (cat. no. 5220.0) provides a measure of Gross value added for the Agriculture, forestry & fishing industry in State. Data from the *Agricultural Commodities: Small Area Data, Australia, 2006-07 (cat. no. 7225.0)* provides information on the gross value of agricultural production within Capital City and Balance of the State.

The share of the gross value of agricultural production within Capital City is used to allocate the State Gross value added figure to Capital City for 2006-07. The Capital City share is altered in every other year using the hours worked from the *Labour Force, Australia, Detailed, Quarterly (cat. no. 6291.0.55.003)*.

Quality

The most reliable estimate would be for 2006-07, with the estimates based on the labour force survey being a slightly lower quality. The 2006-07 share based on the *Agricultural Commodities: Small Area Data, Australia* publication is 8.5 per cent and the *Labour Force, Australia, Detailed, Quarterly* estimate is 8.3 per cent. This indicates that the labour force survey is a good proxy of economic activity in the Agriculture, forestry & fishing industry.

This method would be unlikely to capture head office operations of Agriculture, forestry & fishing firms located in Capital Cities. This would have a very small downward bias on the estimates. Due to the relatively small size of the industry in the Capital City (0.2 per cent in 2006-07), it would have little impact on the quality of Capital City's GDP.

Mining

Method

The Gross value added per hour worked (labour productivity) for the Professional, scientific & technical services industry is multiplied by the total hours worked in the Mining industry in the Capital City. This is done as much of the Mining activity in the Capital City is often related to head office operations. The Professional, scientific & technical services Gross value added per hour worked is thought to reflect the type of activities carried out by head office operations.

Quality

Due to the conceptual issues with measuring mining production associated with city based workers and lack of data the Mining estimates of Gross value added are considered to be of a very low quality. The method would not account for direct mining operations (quarries, sands etc) which take place in the Capital City. This could have a very small downward bias on the estimates. Due to the relatively small size of the industry in Capital Cities (between 0.1 per cent and 0.4 per cent) it would have little impact on the quality of the Capital City's gross domestic product.

Manufacturing

Method

Data from the *Manufacturing Industry, State and Australian Capital Territory (cat. no. 8221.1.55.001)* publication provides information on the sales income share between Capital City and the Balance of State for 2001-02. *Manufacturing Industry, Australia, 2006-07 (cat. no. 8221.0)* provides the sales income split for 2006-07.

The share of the income within Capital City and the Balance of State is used to allocate the State Gross value added figure to Capital City for 2001-02 and 2006-07. The Capital City share is altered in every other year using the movements in hours worked from the *Labour Force, Australia, Detailed, Quarterly (cat. no. 6291.0.55.003)* publication.

Quality

The most reliable estimate would be for 2001-02 and 2006-07 with the estimates based on the labour force survey of a slightly lower quality. The 2001-02 income share for the Capital City is 69.8 per cent and the labour force hours worked is 72.8 per cent. The 2006-07 income share for the Capital City is 68.6 per cent and the labour force hours worked is 70.3 per cent. This indicates that the labour force survey is a reasonably good proxy of economic activity in the Manufacturing industry. The availability of detailed Manufacturing industry statistics data for 2001-02 and 2006-07 makes the estimates of Capital City's industry Gross value added of a good quality.

Electricity, gas, water and waste services

Method

National Gross value added for the two digit industry subdivisions from *Australian System of National Accounts* (cat. no. 5204.0) and the Census two digit industry subdivision place of work data is used to estimate an average Gross value added per worker. The Census place of work data for Capital City and the Balance of State is then applied to these averages. The share of the total estimated gross valued added is applied to the *Australian National Accounts: State Account* (cat. no. 5220.0) Gross value added for the Electricity, gas, water & waste services for State. This produces an estimate for 2005-06 for Capital City and Balance of State Gross value added for this industry. Population growth is then used to create a time series for industry Gross value added.

Quality

The quality for the Electricity, gas, water & waste services industry estimates would have to be seen as low. The lack of data is the key issue. The conceptual issue of splitting Gross value added between generators / water treatment plants and distribution networks is also challenging. The industry is estimated to represent around 2.0 per cent of a city's gross domestic product.

Education and training

Method

The Australian Bureau of Statistics publication, *Australian National Accounts: National Income, Expenditure and Product* (cat. no. 5206.0) provides a measure of Gross value added for the Education industry in Australia. *Government Finance Statistics, Education, Australia* (cat. no. 5518.0.55.001) is used to split the national estimates of Education Gross value added into School & Post School Education.

Australian National Accounts: State Account (cat. no. 5220.0) provides a measure of Gross value added for the Education industry in each State. *The Survey of Education and Training* (cat. no. 6278.0) provides data on people with education qualifications, and estimates of school aged population taken from *Population by Age and Sex, Regions of Australia* (cat. no. 3235.0) are used to allocate the State estimate of education by level to the capital city.

Quality

Given the detailed level of data being used and the fairly straightforward nature of the delivery of education and training services (in a spatial sense) lead to the quality of this industry estimated being classed as good.

Ownership of dwellings

Method

Average rents in Capital City and Balance of the State are derived from the *Housing Occupancy and Costs, Australia, 2005-06* (cat. no. 4130.0) publication and combined with population data to estimate the share of Ownership of dwellings for the two areas. This is then applied to the Ownership of dwellings Gross value added from the *Australian National Accounts: State Account* (cat. no. 5220.0).

Quality

The quality of the available data and the clear conceptual boundaries lead to the quality of this industry estimate being classed as good.

All other industries

Method

In the absence of any data which would allow the share between the Capital City and Balance of the State to be estimated, the hours worked from the *Labour Force, Australia, Detailed, Quarterly* (cat. no. 6291.0.55.003) is used. The industries which this method is applied to are:

- Construction
- Wholesale trade
- Retail trade
- Accommodation & food services
- Arts & recreation services
- Other services

For some industries one adjustment is made to the hours worked share. The hours worked are weighted by an average wage rate for Capital City and Balance of the State from the Census. This accounts for different economic structures within each industry in the Capital City and Balance of the State. For example, in Financial & insurance services the type of activities (from basic banking operations up to hedge funds) is much wider than in Balance of the State (where basic banking operations are the most common activities). The industries which this method is applied to are:

- Information media & telecommunications
- Financial & insurance services
- Rental, hiring & real estate services
- Professional, scientific & technical services
- Public administration and safety
- Health care and social assistance

Quality

The quality of the various industry estimates would vary and should be treated with some caution but in aggregate the method should be provide a good estimate of a Capital City's gross domestic product.

Taxes less subsidies on products

Method

Australian National Accounts: State Account (cat. no. 5220.0) provides a measure of Taxes less subsidies on products for the Agriculture, forestry & fishing industry in each State. The Capital City share of Agriculture, forestry & fishing industry Gross value added is used to split the value of Taxes less subsidies on products this industry. The residual of the State Taxes less subsidies on products is then spilt using the total industry value added (excluding Ownership of dwellings) for Capital City and the Balance of State.

Quality

This method should produce reasonable estimates of the split between Capital City and Balance of the State for Taxes less subsidies on products.

Aggregation of industry estimates to Gross Domestic Product Via the use of the implicit price deflation technique, the chain volume measures of industry Gross value added are converted into current prices. This method overcomes the non-additivity issue with the Chain volume measure and allows the aggregation of industry estimates of Gross value added to overall gross domestic product. In order to maintain consistency with the wider National Accounts, the Production approach estimate of Capital City gross domestic product is benchmarked to Gross State Product. An industry weighted GDP implicit price deflator is created to for the Capital City and Balance of State.

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