

Muval Index



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Welcome to the 2024 Muval Index

A note from our CEO

Welcome to Muval's fourth annual Moving House Index. In this report, we take a deep dive into the latest migration trends within Australia, examining where people are moving to and from, while also exploring the main reasons behind these shifts. This year, we're seeing significant changes in the landscape, with new economic and regional trends shaping people's decisions.

For the first time since before COVID, Melbourne returned to positive net migration, seemingly signalling a shift in the city's appeal as a place to live and work. But just as Melbourne appeared to be bouncing back to pre-pandemic patterns, the city cooled, and Brisbane heated up. Following a dip in interest to Brisbane earlier in the year, likely due to significant increases in house prices, Brisbane has toppled Perth to claim the highest positive net migration in Australia.

The removalist industry is also feeling the effects of broader economic conditions, with some sectors experiencing a 20-year low in demand. This decline has put considerable strain on operators nationwide, reflecting the changing dynamics in how and where Australians are choosing to relocate.

This year's report offers deeper insights into the cultural and economic factors influencing these decisions, from the rising cost of living to shifting lifestyle priorities. Australians are no longer simply moving for work or home

ownership; they are increasingly focused on finding a better work-life balance and more affordable living conditions. Our data reveals a growing trend of people prioritising lifestyle upgrades over traditional motivations like career moves, with some cities and regions benefiting from this shift more than others.

In addition, the report introduces our new MuveRank leaderboard data for 2024. MuveRank is a unique, real-time ranking system that utilises Muval data and was developed in partnership with The University of Queensland. This tool provides a detailed look at migration patterns down to local government areas, allowing us to pinpoint which areas are experiencing the biggest shifts in and out.

We hope you find this year's edition insightful as we continue to track the evolving dynamics of internal migration in Australia from the forefront of the relocations industry.



James Morrell
Muval CEO

A handwritten signature in black ink, which appears to read "James Morrell".

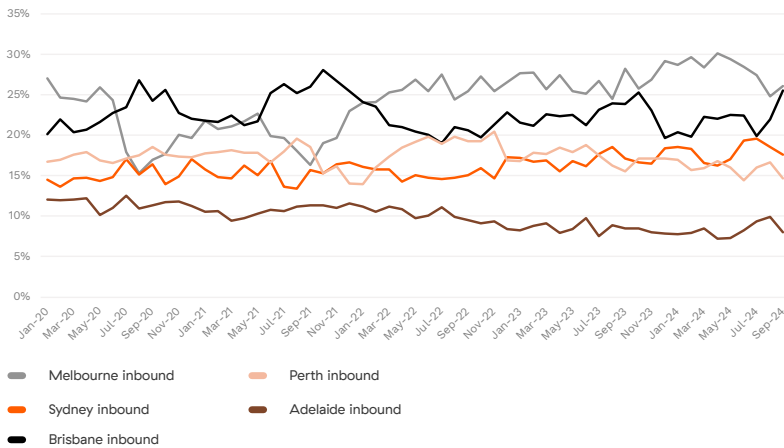
Migration

A nation on the move

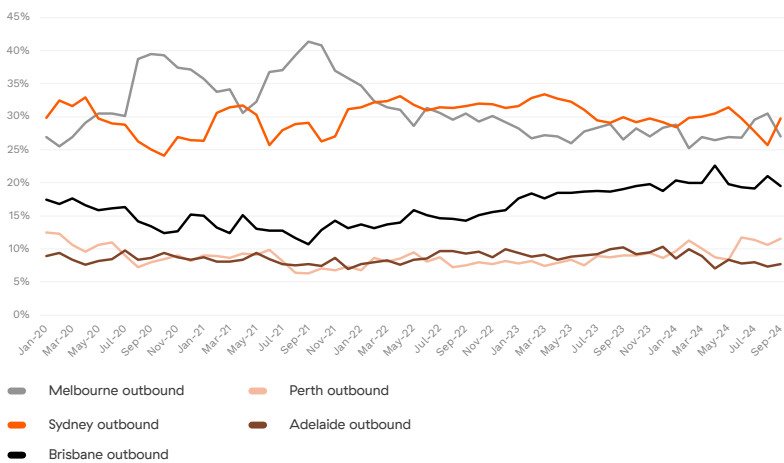
Australia remains one of the most mobile in the world when it comes to moving house. Muval's data gives a unique insight in to where migration patterns are emerging in 'real time'.

Interstate migration trends

Inbound interstate migration trends by city



Outbound interstate migration trends by city



A tale of two cities

According to our latest interstate moving data – the most up-to-date internal migration data available, which shows where Australians are moving right now – Melbourne remains the number one capital city to move to. However, that looks set to change as Brisbane increases in popularity in 2024.

After accounting for almost a third of inbound major metro moves in the first few months of the year (30% in February and April), the Victorian capital has been gradually declining and in September the city was equal with Brisbane on 26 per cent of inbound movement.

As Melbourne slid downwards, Brisbane has been on the up, rising from a fifth of all inbound major metro moves (20%) in

January to more than a quarter (26%) in September.

After Brisbane’s outbound moving enquiries jumped to their highest level on record, reaching 23% of all major metro outbound moves in April, the city’s outbound flow has steadied accounting for 20% in September.

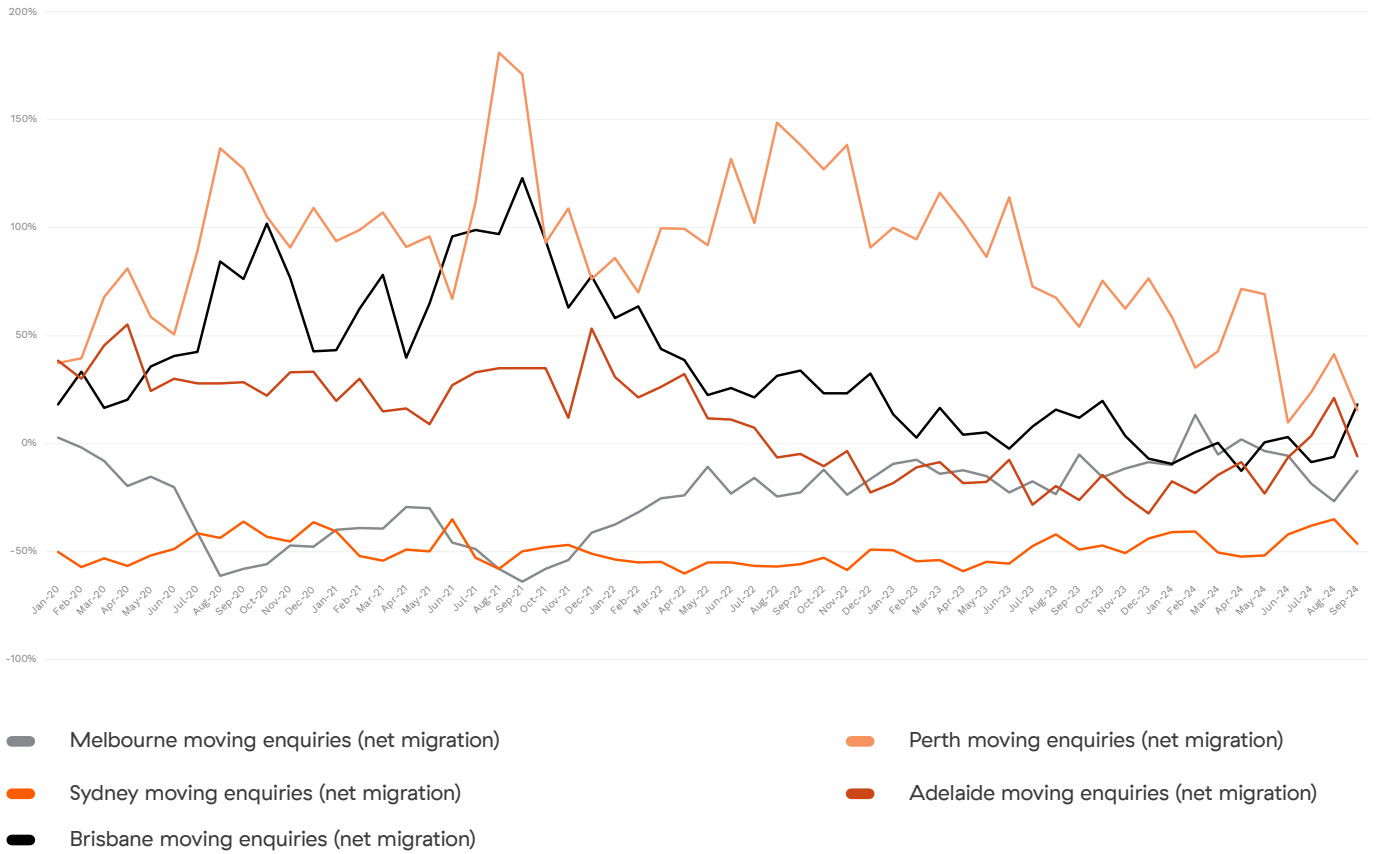
With outbound moves leveling out and a rise in inbound interest, Brisbane now has the highest net migration rate in Australia (+18% in September), leapfrogging pandemic hot spot Perth (+15% in September) for the first time in three years.

In more bad news for Melbourne, it was briefly the most popular city to move from, overtaking Sydney in July (28%) and August (26%) when it accounted for 30% of outbound metro moves.

Melbourne’s recent slide has seen the city drop back into negative net migration, as deep as -27% in August, just as it had finally entered positive net migration for the first time since the pandemic (+13% in February and +2% in April).



Interstate moving enquiries net migration trends



The impact of inflation on our cities

A rollercoaster of highs and lows is being played out across all the major cities as uncertainty grips the housing market and Australia teeters on the brink of recession.

Australia’s most expensive capital, Sydney, where an average home now costs around \$1.5 million, has accounted for the most outbound traffic in 2024 as residents go in search of a more affordable lifestyle. Around a third of all major metro outbound moves in 2024 were from the Harbour City, peaking at 31% in April and May, and settling on 30% in September.

With 18% of inbound moves, Sydney has cemented its place as the third most popular city to move to, swapping podium positions with Perth which was third behind Melbourne and Brisbane most of last year. The ebb and flow of inbound and outbound movement has seen Sydney’s net migration rise as high as it has ever been on record (-35% in

August) and then slip back to where it has comfortably sat since the pandemic (around -50%).

In what appears to be a post-pandemic rebalancing of internal migration, Perth no longer has the highest net migration in the country. After a pandemic peak in 2021 of +181% net migration, the city dropped as low as +10% in June 2024, and is sitting on +15% in September.

No longer seen as an affordability haven off the back of record rent and housing rises, Perth’s inbound traffic slipped as low as 14% in August this year, half the movement flowing to Melbourne during the same month (28%). Meanwhile outbound traffic is on the up, climbing from just 8% of all outbound major metro moves to 12% in 2024.



“Australians aren’t hesitating to cross borders in search of more affordable housing”

With the median house price in Adelaide around half the price of a Sydney home, there has been a slight lift in inbound traffic to the South Australian capital this year, accounting for as high as 10% of major metro moves in August, in comparison to the average of around 8% over the past two years. After consistently sitting around 9–10% in 2023, Adelaide’s outbound migration appears to be slowing in 2024, dipping as low as 7% in April and August, and settling on 8% in September.

These changes have helped lift the South Australian capital out of the doldrums with Adelaide back in positive net migration for the first time since August 2022 (+4% in July and +21% in August).

As people typically enquire about removalists up to 30 days before they move, Muval’s data is a proven early indicator of moving trends in Australia.

Muval’s latest moving data highlights how rising cost of living pressures and unpredictability in the housing market are taking their toll on the nation’s cities.

While rental moves are traditionally local, within the same suburb or neighbouring suburbs, Australians aren’t hesitating to cross borders in search of more affordable housing as rising interest rates force landlords to raise rents to record highs.

With that said, industry-wide moving numbers are down around 20% in 2024 as many Australians sit tight and wait for good news from the Reserve Bank.

With inflation trending down, relief may be on the horizon and when the current macro-economic climate of higher interest rates, tight housing affordability and housing shortages begins to cool, Muval predicts a moving boom will follow.

2024 MuveRank Leaderboard

In 2023 we officially launched our MuveRank area rankings, developed in collaboration with leading population geographers at The University of Queensland. It is a first-of-its-kind, 'real-time' ranking of areas within Australia (SA4) in terms of their net migration, in migration, and out migration.

To create MuveRank, University of Queensland geographer Dr Elin Charles-Edwards collated anonymised Muval data, including origin to destination flow data for proposed moves as a proxy for actual migration behaviour. This information was then cross-checked with official statistics provided by the Australian Bureau of Statistics (ABS) and Census. The result is an Australian-first data machine that provides a real-time early indicator estimate of migration, months in advance of the ABS.

MuveRank is a useful yard stick for determining which areas are experiencing the largest migration shifts. In the 2024 data, we can see that many areas of

Melbourne have experienced the largest net migration changes, which coincides with our observations throughout the year that Melbourne, at times, has tipped back over in to positive net migration for the first time since pre-COVID.

While our capital city interstate migration trend data (pages 5-7) focuses exclusively on interstate moves to capital cities, MuveRank data also considers movement within a given city. In this way it shows a more nuanced view of which local areas are gaining and / or losing residents relative to other areas.

Top 5 for biggest gains (positive net migration)

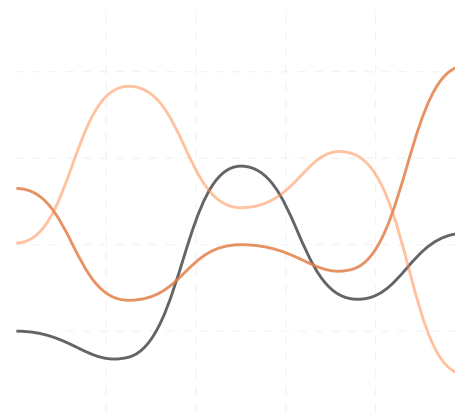
1. Australian Capital Territory
2. Melbourne – South East
3. Melbourne – West
4. Melbourne – Outer East
5. Melbourne – North East

Top 5 for biggest losses (negative net migration)

1. Brisbane Inner City
2. Sydney – City and Inner South
3. Darwin
4. Perth – Inner
5. Brisbane – South

Top 5 for most moves overall (total migration)

1. Melbourne – Inner
2. Melbourne – West
3. Sydney – City and Inner South
4. Melbourne – South East
5. Brisbane Inner City



Explore the data

muv.al/data

Definitions

Ranking	Definition
Positive net migration	The ranking of the most move ins after subtracting the move outs. In this scenario the population of the area ranked 1 would have increased the most out of all areas.
Negative net migration	The ranking of the most move outs after subtracting the move ins. In this scenario the population of the area ranked 1 would have decreased the most out of all areas.
Total migration	The ranking of the most move ins plus move outs. This is a ranking of the most transient area. In this scenario the overall population might remain the same, but the area ranked 1 will have seen the most turnover out of all other areas.



The new great Australian dream

Australian cultural immortal Darryl Kerrigan emphatically declared that “a man’s home is his castle”, but is that true for the next generation of Aussies who are increasingly weighing their options – and their costs?



In recent years, unprecedented events caused an upheaval in internal migration, forcing Australians to move for freedom, work and housing. Firstly, the COVID lockdowns sent thousands fleeing north and west, and now the cost-of-living crisis is forcing many more out of their homes as housing costs skyrocket and affordability plummets.

In Muval's latest research, which asked a sample size of Australians what sparked their move this year, another trend emerged — the new Great Australian Dream.

The data tells us that Australians are no longer fixated on owning a home, or

being a slave to a mortgage they can't service — their new dream is to live, and this year they are prioritising lifestyle over life stress.

In 2024 Australians are still impacted by the high cost of living — in Sydney's CBD, median rents have soared 71 per cent in just three years — but they also want to enjoy their life, with almost a third going in search of a better lifestyle this year.

While cost of living remains the number one reason people moved in the past 12 months (36% in 2024 v 35% in 2023), there are also increasingly more lifestyle-based factors at play this year as Australians say enough is enough.

According to the recent Muval research, twice as many Australians moved to upgrade their home in 2024 (30%) compared to 2023 (16%) and slightly more went in search of a better lifestyle (27%, up from 24%).

When it comes to reasons why people are planning to move in 2025, life, not work or housing or money, is the biggest motivating factor as people strive to make work-life balance a reality instead of an unachievable myth.

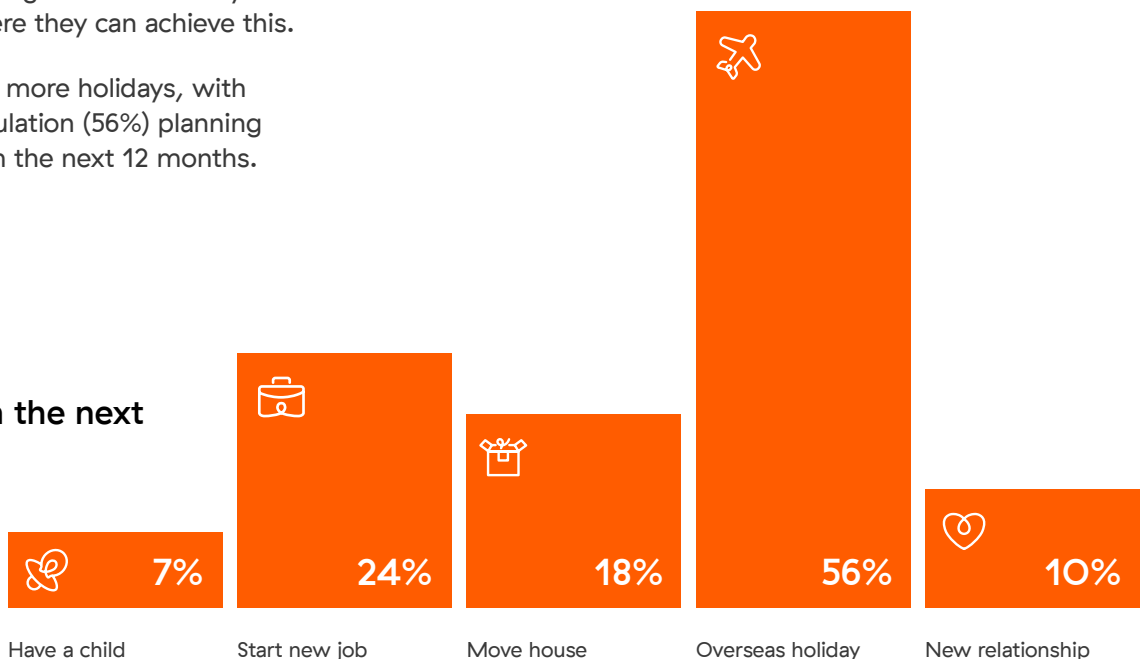
“The data tells us that Australians are no longer fixated on owning a home”

Around a third (29%) of respondents cited cost of living as the main reason for moving in the next 12 months, but the number one reason (41%) was to live a better life, followed by a home upgrade (38%).

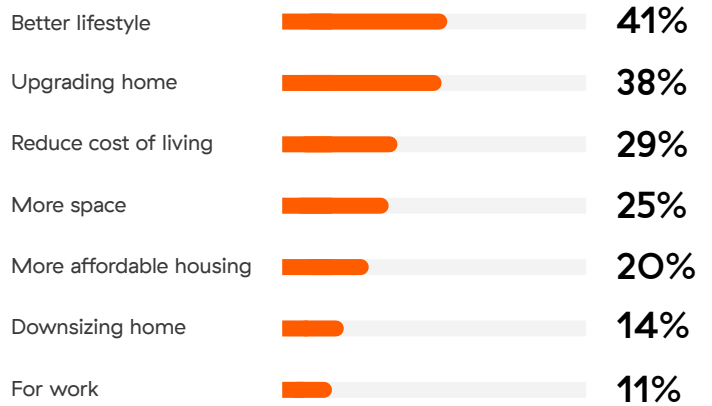
This shift in priorities is in line with a change of pace that’s emerging out of the cost-of-living crisis and off the back of COVID, as some Australians decide they simply want a good life and they are moving somewhere they can achieve this.

This also includes more holidays, with over half the population (56%) planning an overseas trip in the next 12 months.

What are you considering in the next 12 months?



Reasons for moving in the next 12 months



In fact it’s the number one item on the wish list in 2024, above and beyond other big ticket life items such as moving house (18%), starting a new job (24%), embarking on a new relationship (10%) or having a child (7%).

Last year, employment (26%) was the second biggest factor driving moves, behind cost-of-living, but in 2024 only 11 per cent of moves were for work.

These results tell us that Australians are fed up with the daily grind and despite all the financial pressures they are facing, they have hit a tipping point and had enough. Whether they have conceded that home ownership is out of their reach, their existing mortgage is unaffordable, or they are ready to move somewhere else to afford a home or have a better life, it’s clear that Australians are choosing life in 2024.

Relocation rebound

The pro-cyclical nature of moving is something we've tracked in a number of past Muval Index publications. With interest rate cuts looking likely in the first quarter of the 2025 calendar year, are we on the cusp of a relocations rebound?

For the past few years, we've been tracking how the macro-economic conditions shape migration trends. Last year, increases in the cost of living featured heavily as people relocated to more affordable housing.

We also took a look back at past economic downturns and their impact on internal migration. We noted that while migration plummets alongside downturns in the economy, it rebounds just as strongly in the year or two that follows. See Figure 1 on the right.

20-year slump in demand for removalists

The removalist industry has faced significant challenges over the past 12 months, with many sectors facing 20 year lows in terms of demand. Aggregated search volume data provided by Google Trends demonstrates this insight clearly. See Figure 2 on the right.

To echo this data, a recent survey of Muval's 150-strong nationwide removalist members indicated that a majority of businesses thought that this year had been quieter than expected.

While one could question if home movers are choosing to 'DIY' over using professional services in order to save on costs, our data suggests otherwise. In fact, our recent survey revealed that 45% of people would book a professional for their next move, but a further 27% aren't moving at the moment.

The effect of an economic downturn on annual interstate migration rates

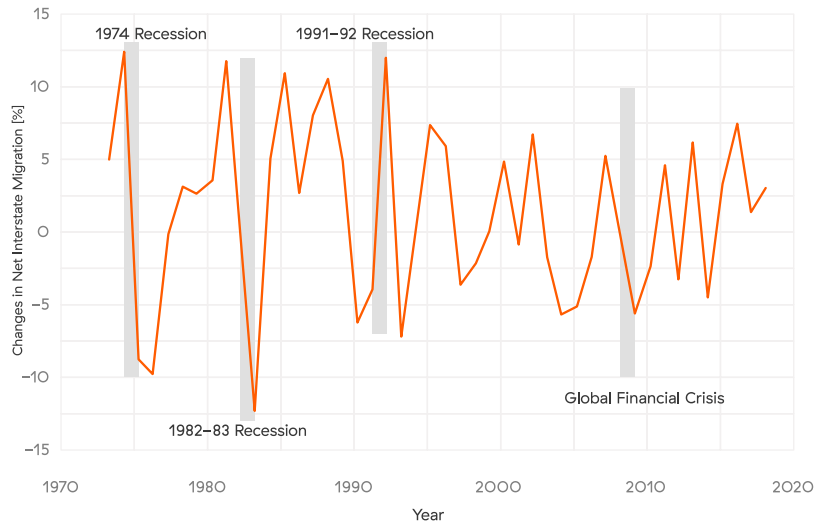


Figure 1

Removalists search trend data

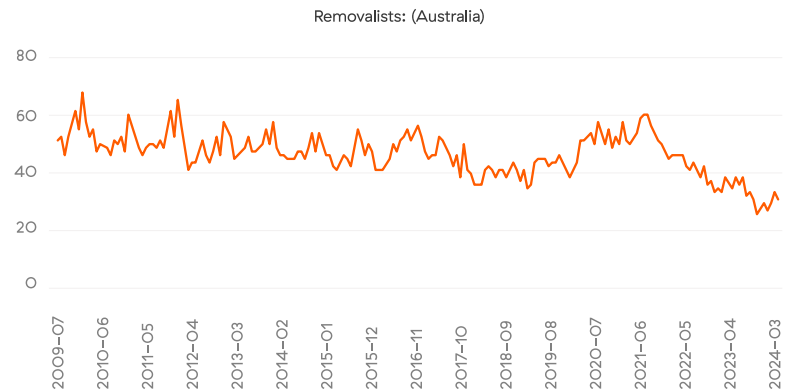


Figure 2



22% more people indicated they are considering moving next year than said they moved in the past 12 months.

The rebound

If past economic shifts are anything to go by, we could be on the brink of a significant rebound in relocations throughout 2025 and 2026. This has significant implications for local governments looking to attract new residents to their areas.

When it comes to internal migration, movers are often motivated by the “perceived benefit” of relocating, rather than absolute figures or objective ‘fact’. We call this “the grass is greener” effect. In a moment like this, successful beneficiaries of net migration improvement will be those that can best represent the opportunities afforded to new residents.

As households weigh up options and plan for the year ahead, it’s a good time for states, cities and local areas to highlight their attributes.

Initiatives like “Move to More”, an Australian Government-funded platform which promotes life in regional Australia, are doing a great job of capitalising on this opportunity. It showcases Australia’s regions, highlights new job opportunities, and provides a welcoming gateway for people looking to trade city life for something more.

Take a look here: movetomore.com.au

Moving Masterclass series

When it comes to moving, we are the experts. Join Muval’s Move Guru Alana Lowes as she unpacks the best tips and tricks for a successful move that we’ve learned from our 45,000 moves and counting.



youtube.com/@muval

Cost comparison: DIY or removalists

Weighing the DIY or professional removalists option when moving house is a consideration many of us wrestle with. For bigger interstate moves, the prospect of a DIY move might be daunting, but here we break down the cost savings which might entice you to reconsider your choices.



Muval now has a range of options for you to book if you're looking to tackle the heavy lifting yourself, including our very own "Selfy" self-pack containers.

Powered by *Selfy*



20ft



40ft

How it works

You pick it

Choose the container size you need. Either 20ft or 40ft. 20ft containers are approx 6.1m L x 2.5m W x 2.9m H with internal capacity of 37m³. 40ft containers are approx 12.2m L x 2.5m W x 2.9m H with internal capacity of 76m³.

Choose whether you are renting the container for the relocation or purchasing to keep after the relocation (new or used options available).

For smaller moves, or for inner-city areas where a full container can't fit, you can

also book a TAXIBOX through Muval which measures 2.4m long, 1.5m wide and 2.2m high externally and has a rough internal capacity of 8m³.

We deliver it

Your preferred container will be delivered on a tilt tray or side loading truck to your residential/commercial address. Make sure you have a suitable location and sufficient space for the placement of the container. We can deliver these units to each capital city throughout Australia (regional areas by request).

You load it

We'll provide you with some tips on how to pack the container safely and recommend using industry quality materials to secure and restrain your items as you pack the container in preparation for transit.

Once all packed, you just need to take photographs of the packed container and send them to us so that we can determine the total volume of furniture and items being moved and then you lock the container with your own padlock.

We move it

Once packed, we will collect and deliver your container locally, or you have the option to move the container interstate

(metro areas) throughout Australia (regional locations by request). We work on 14-day transit times from the time the container is collected to delivered. These times can vary depending on the locations and time of year.

Our team will keep you informed so you're well prepared for the delivery timing. Make sure you arrange insurance for your goods in case they are damaged in transit as this is not included by default.

You unload it

Your locked container arrives to your new address for unloading. Overall timings are based around 3 days to load, 14 days to deliver, 3 days to unload.

Cost comparisons

To help you weigh up your options, we've put together the following price comparison tables from some of mainland Australia's major capital cities. Prices are based on an average 3 bedroom house move (35 cubic metres) and a 20ft self-pack container.

Brisbane outbound

Destination	Interstate removalists	Self-pack	DIY savings
to Sydney	\$4,851	\$2,874	\$1,977
to Melbourne	\$5,195	\$2,885	\$2,310
to Adelaide	\$6,070	\$3,710	\$2,360
to Perth	\$8,367	\$7,828	\$539

Sydney outbound

Destination	Interstate removalists	Self-pack	DIY savings
to Brisbane	\$4,624	\$3,723	\$901
to Melbourne	\$4,575	\$3,034	\$1,541
to Adelaide	\$5,361	\$3,695	\$1,666
to Perth	\$8,460	\$7,699	\$761

Melbourne outbound

Destination	Interstate removalists	Self-pack	DIY savings
to Brisbane	\$5,863	\$4,425	\$1,438
to Sydney	\$5,010	\$3,186	\$1,824
to Adelaide	\$4,822	\$3,062	\$1,760
to Perth	\$7,297	\$6,934	\$363

Adelaide outbound

Destination	Interstate removalists	Self-pack	DIY savings
to Brisbane	\$5,741	\$4,264	\$1,477
to Sydney	\$4,582	\$3,370	\$1,212
to Melbourne	\$4,180	\$2,742	\$1,438
to Perth	\$6,512	\$6,026	\$486

Perth outbound

Destination	Interstate removalists	Self-pack	DIY savings
to Brisbane	\$8,022	\$4,663	\$3,359
to Sydney	\$5,412	\$3,000	\$2,412
to Melbourne	\$5,614	\$2,873	\$2,741
to Adelaide	\$5,157	\$2,713	\$2,444

Employee relocations, reimagined

Muval's new Employee Relocations Software platform simplifies work moves, providing a modern, centralised solution that benefits both employers and employees.

Relocating employees is a complex task for HR professionals, often involving financial stress and logistical challenges for staff. We're often astounded when organisations tell us that the extent of their relocation assistance for employees involves reimbursing them for costs but otherwise leaving them to their own devices, as if the outcome was a given and the only barrier to a successful move is cost.

If your people are your organisation's greatest asset, doesn't it make sense to ensure that a work-related relocation is handled with care? Muval can ensure a positive experience for the employee and their family, allowing for a stress-free start to their new role.

Let Muval EmployeeAssist take care of everything.

Key features for HR professionals

Dashboard

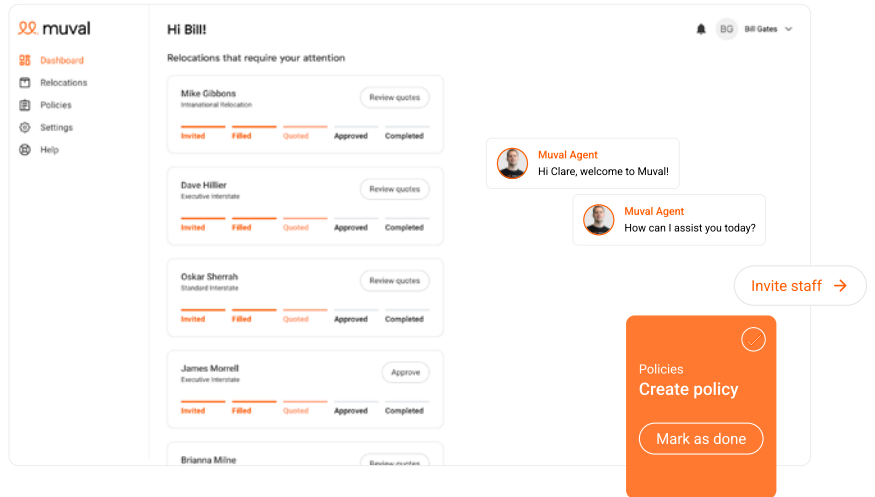
Muval's EmployeeAssist platform offers a centralised dashboard for HR teams to track relocations in real-time, providing full visibility on move statuses, quotes, and approvals.

Policies

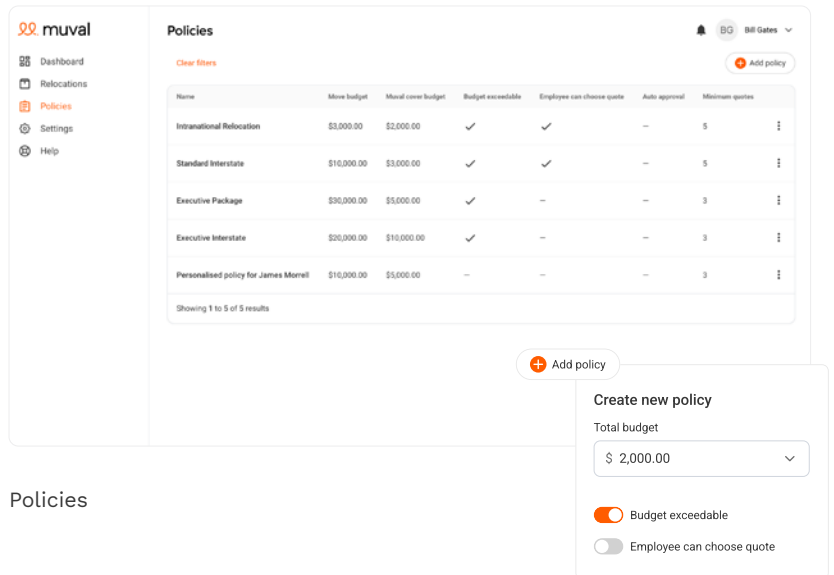
The customisable Policies feature allows organisations to define budgets, approval workflows, and move parameters tailored to different employee levels. HR professionals can set distinct policies for executives and new hires, ensuring consistency and cost control.

Flexible budgets

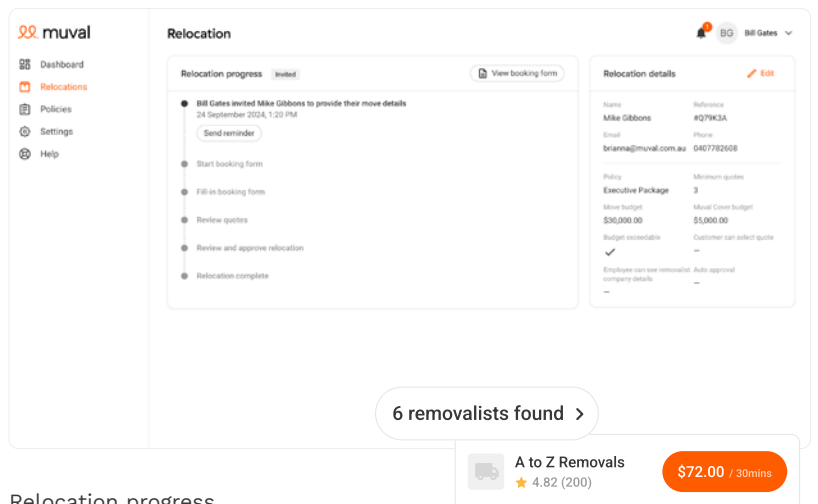
The platform also enables flexible budget management. Employers can cover a set amount, allowing employees to pay for additional services if they exceed the budget. Employee self-service features empower staff to manage their relocations, while HR retains oversight, streamlining the process and eliminating the hassle of sourcing quotes.



Dashboard

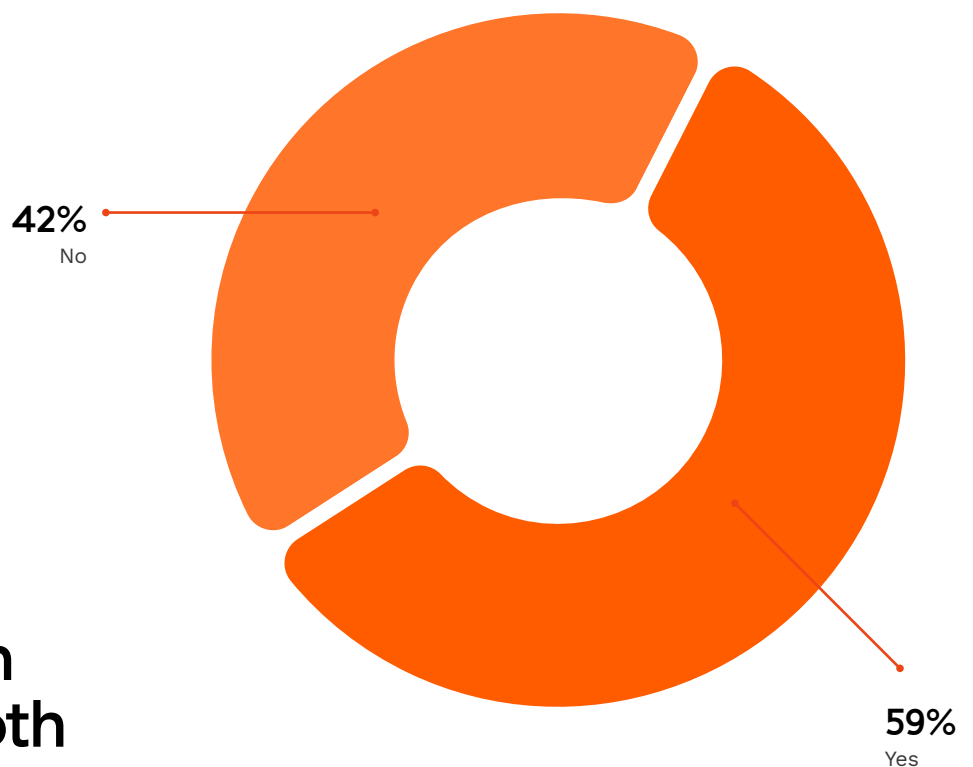


Policies



Relocation progress

Did your employer pay for the move/reimburse you for any of the costs?



“The platform ensures smooth relocations and supports HR teams in providing a high-quality moving experience”

Benefits of Muval’s network

Muval’s platform connects companies with a quality-assured removalist network, backed by over 45,000 moves to date and a dedicated customer service team. Employees avoid out-of-pocket expenses, as the platform manages direct payment with the company’s finance department, making the relocation experience seamless.

Muval’s Employee Relocations platform transforms the relocation process for HR professionals, offering transparency, flexibility, and a stress-free experience for employees. With its robust features and trusted removalist network, the platform ensures smooth relocations and supports HR teams in providing a modern, high-quality moving experience.



Entertaining kids when moving house: box creations

How many of us with kids have spent an unreasonable amount of money on an incredible new toy for the children to play with, only to find they get more enjoyment out of playing with the box it came in?

The good news is that boxes are in no short supply when moving, and so it's going to feel like Christmas has come early for the younger members of the household.



If you've moved with kids as much as I have, you'll know that it's inevitable before or after the move that your moving boxes will end up as the creative fodder for your children.

Rocket ships, makeshift kitchens, tunnels, forts, or racing cars. The possibilities are endless.

However, boxes can be tricky to manipulate and young kids + boxes + scissors / Stanley knives definitely don't mix. No one wants an impromptu trip to the hospital while you're in the middle of moving!

Never fear. We recently stumbled across these absolutely incredible cardboard box toolkits from Makedo. They're for children ages 5 and up and come with a range of tools to bring your child's imagination to life through cardboard box creations.

Incredibly, the tools are so well designed that there are no sharp edges for children to hurt themselves on, so you can leave them to their own devices to make whatever their hearts desire.

Makedo toolkits come in a range of sizes at different price points. We got our hands on their "Discover Kit" which I would recommend particularly if you have more than one child at home.



Words & photos by
Muval's Move Guru,
Alana Lowes



What's included in the Discover Kit:

126 pieces:

- 2 x Safe-Saw
- 1 x Scru-Driver
- 1 x Fold-Roller
- 90 x Scru (connects 1-3 layers)
- 30 x Scru+ (connects 3-5 layers)
- 2 x Mini-Tool



“Not only does it give you something to do with your leftover boxes, but it’s also a fun way to bring your children into the moving experience”

The kids really enjoyed puncturing multiple box layers and screwing them together with the Scru-Drivers. They also loved the Fold-Roller and found that using the Safe-Saw along perforated lines they created made cutting out their desired shapes was really easy.



After starting out with the intention of creating a truck, we ended up pivoting half-way through to a love heart, flower-covered peace van as their imaginations took hold.

Honestly, these kits are an absolute must have if you’ve got children under 10 and a move coming up. Not only does it give you something to do with your leftover boxes, but it’s also a fun way to bring your children into the moving experience and give them something to get excited about. Highly recommended!

Watch our creation come to life

