THE GREAT MIGRATION:
Leaving our Cities for the Regions

REGIONAL MIGRATION SURVEY
Part 1: Internal migration patterns,
motivations and experiences

Dr. Peter Ghin, Research Fellow, the Future of Work Lab,
Faculty of Business and Economics

Prof. Susan Ainsworth, Professor of Management,
Faculty of Business and Economics

This report has been written for the Future of Work Lab

THE UNIVERSITY OF
MELBOURNE

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EXECUTIVE SUMMARY

The internal migration of Australians from metro to regional areas has received increasing attention since the beginning of the COVID-19 pandemic. Although this has sometimes been characterised as an 'exodus' from Australian cities, the pandemic reflects more of an amplification of a well-established trend towards counter-urbanisation.

The first instalment of the Future of Work Lab's Regional Migration Survey aims to better understand the migration patterns, motivations, and experiences of internal migrants.

With respect to migration patterns, our key findings indicate that:

- People are predominantly settling in rural Victorian regions (49%), followed by regional cities (34%), and peri-urban regions (17%),

- The top regional destinations are the City of Greater Geelong (12%), Hepburn Shire (10%), with the Surf Coast, the City of Ballarat, and Greater Bendigo each attracting 8% of internal migrants, and

- 80% of people settled in regional Victorian locations that were within a 150km of their point of departure from Greater Melbourne.

Our survey also found that:

- People who migrated to regional Victoria *after* COVID-19 restrictions came into effect, tended to be younger and have a higher income that those that moved prior to the pandemic,

- 68% of people had intentions to move to regional Victoria *before* the outbreak of COVID-19, and

- One third (33%) of internal migrants had existing ties to the region they moved to, while 67% had no previous attachment to their choice of migration destination.

We asked people to rank which factors influenced their decision to move regionally. The top three items rated as being highly significant were:

- *Better lifestyle/amenity* (73%)
- *Being closer to the natural environment* (61%)
- *Housing affordability* (52%).

Lifestyle and the environment were particularly significant for those who moved to a rural Victorian destination. While the pandemic did have some impact on peoples' migration choices, *fewer COVID-19 restrictions* was rated as highly significant by only 24% of respondents.

The survey found that, overall, people felt positively about their migration to regional Victoria. 75% of people were *extremely satisfied* with their move to the regions, with only 2% expressing some degree of dissatisfaction. Additionally, 85% of people either *strongly* or *somewhat* agreed that they had felt welcomed by the local community.

Together, these findings help to deepen our knowledge about internal migration in regional Victoria. This knowledge is critical for future investment in the regional economy and planning for an equitable and sustainable future as the regions continue to grow.

Forthcoming reports by the Future of Work Lab will focus on the working patterns of internal migrants now living in regional Victoria, and on their potential role in stimulating regional innovation.

1. MIGRATION PATTERNS

Where are people moving from?
Most survey respondents who moved to regional Victoria migrated from the inner metro region of Melbourne (79%), while 14% of people migrated from Melbourne's outer metropolitan region. Interstate movers accounted for the remaining 7% of the internal migration population, with the largest number of these (43%) coming from the Greater Sydney region.

The central and inner-northern local government areas of the City of Darebin, City of Melbourne, and City of Moreland accounted the largest proportion of internal migrants to the regions - 11%, 8% and 7% respectively. The City of Wyndham accounted for the largest number of regional movers from the outer metro area, representing 6% of the overall internal migration population.

Where are people moving to?
Overall, rural Victoria attracted almost half of all internal migrants (49%), followed by regional cities (34%), and the peri-urban regions (17%). The Shire of Hepburn, which incorporates the popular townships of Daylesford, Trentham, and Hepburn Springs, attracted the highest proportion of internal migrants to rural Victoria (10%). The burgeoning Surf Coast Shire, which encompasses the popular tourist towns of Torquay, Lorne, and Anglesea, also attracted a high proportion of internal migrants (8%).

However, it was the regional city of Geelong which attracted the greatest proportion of surveyed internal migrants overall (12%). Along with other major Australian coastal destinations close to capital cities such as the Sunshine Coast, Gold Coast, Newcastle and Wollongong, the City of Greater Geelong has shown itself to be an extremely popular destination, attracting a 4% share of internal migrants to regions nationally[1].
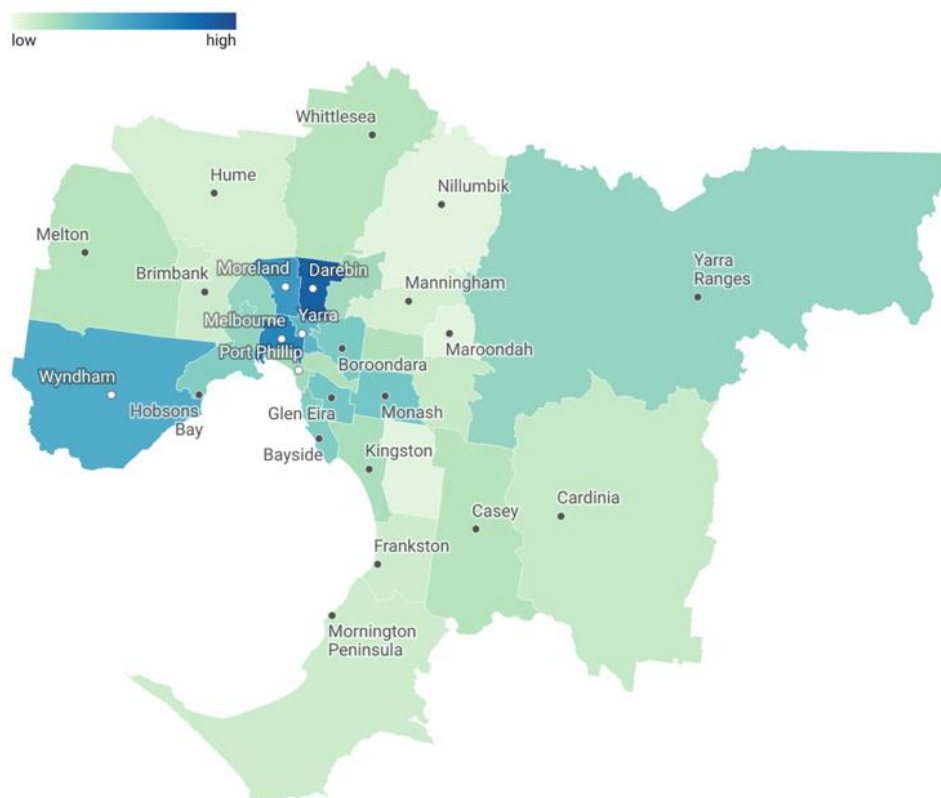

Fig. 1: Map of outbound patterns of internal migration from Greater Melbourne by LGA (n=416)
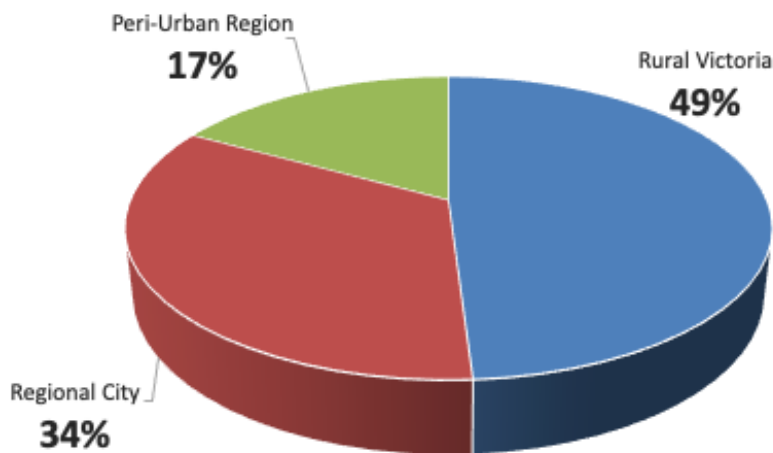
Fig. 2: Percentage of inbound internal migrants by region (n=416)

There was a relationship between peoples' age and the location they chose to migrate to. People aged between 45-64 were more likely to migrate to rural Victoria than any other age category, while people who were 18-24 years old were more likely to migrate to a regional city.

These migration choices are likely to be influenced by the relationship between life stage and employment, with younger people gravitating to larger centres for greater work opportunities and the older age cohort making lifestyle changes in preparation for exiting the workforce.

The regional cities of Ballarat and Greater Bendigo each attracted 8% of the surveyed internal migrant population.
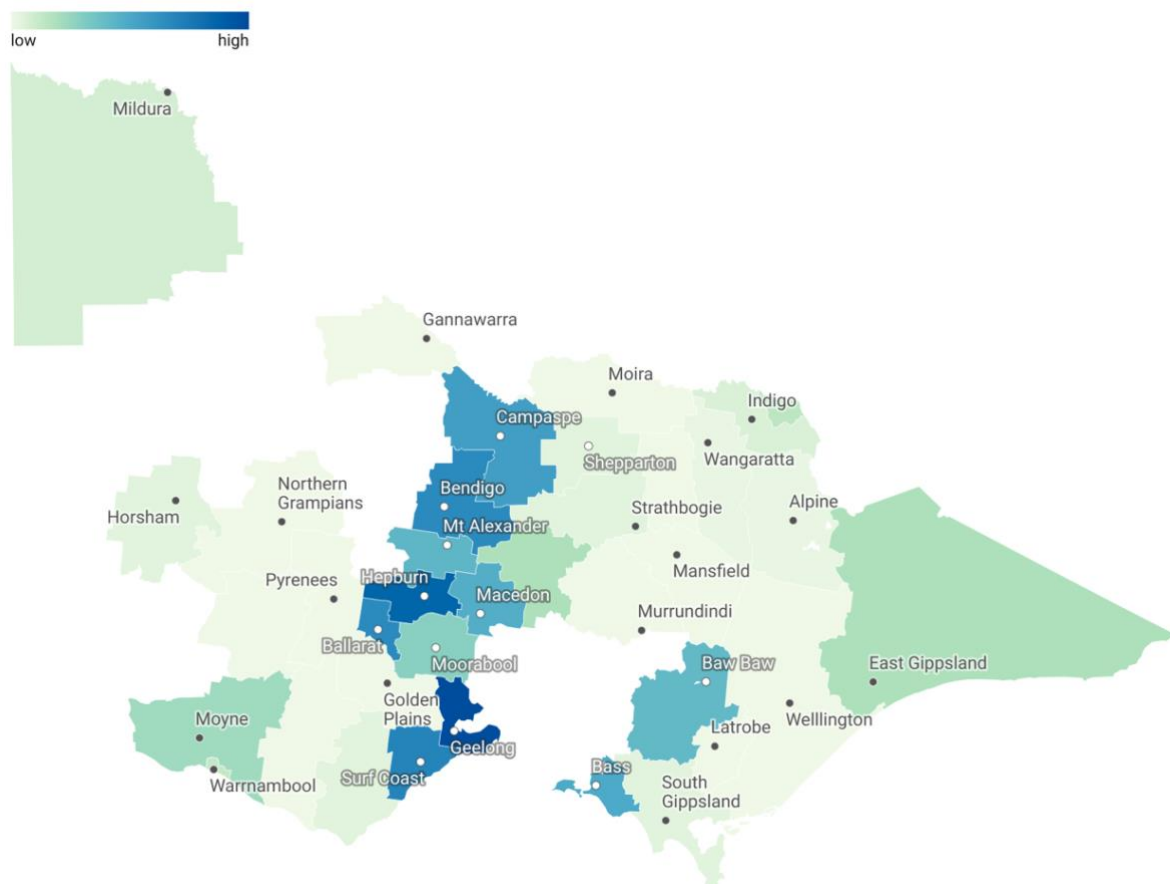

Fig. 3: Map of inbound settlement patterns of internal migrants to regional Victoria by LGA (n=416)

How far did people travel?

On average, people who moved to regional Victoria (excluding interstate migrants) settled within 125km of their point of origin in Greater Melbourne.

44% of people stayed within 100km, while 80% of the surveyed population relocated to within 150km of their original location.
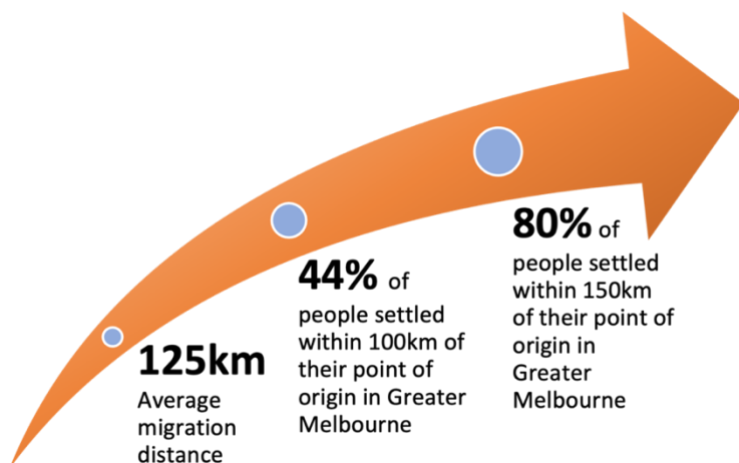
When did people move?

The survey invited responses from individuals who had moved to regional Victoria in the period between 2016-2021. Most respondents (53%) migrated before March 2020, when the State government imposed its first lockdown on Victorians in response to the COVID-19 pandemic. The remainder of respondents (47%), moved after the first lockdown came into effect.

There was a significant relationship between age and when people migrated to regional Victoria. The older a person was, the more likely survey respondents were to have relocated *before* the commencement of the pandemic. Equally, the younger a person was, the more likely people were to have moved *after* COVID-19 restrictions came into place.

125km
Average migration distance

44% of people settled within 100km of their point of origin in Greater Melbourne

80% of people settled within 150km of their point of origin in Greater Melbourne

Fig. 4: Average internal migration distances travelled within Victoria (n=416)

The vast majority of people, therefore, relocated to a regional destination that was within a two-hour commute of the Melbourne metro area.

The shortest migration across the Melbourne-regional boundary was between the north-eastern suburb of Doreen, to the town of Wallan in the peri-urban region of the Mitchell Shire (less than 35km).

The longest migration undertaken within Victoria was between Emerald in the outer eastern suburbs of Melbourne, to Merbein, just north of Mildura (over 500km).
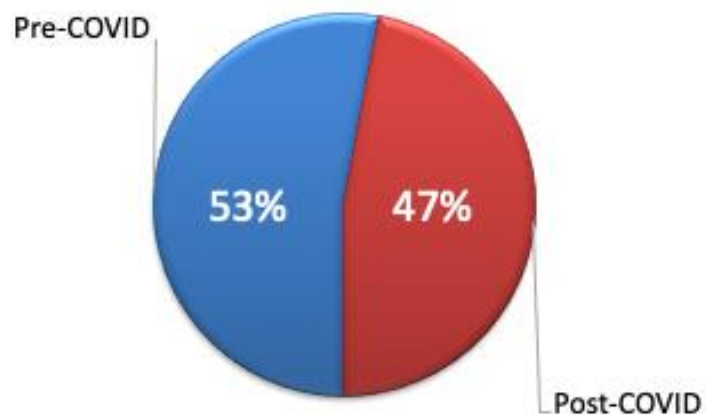

Pre-COVID — 53%
Post-COVID — 47%

Fig. 5: Percentage of internal migrants who moved before and after COVID-19 (n=416)
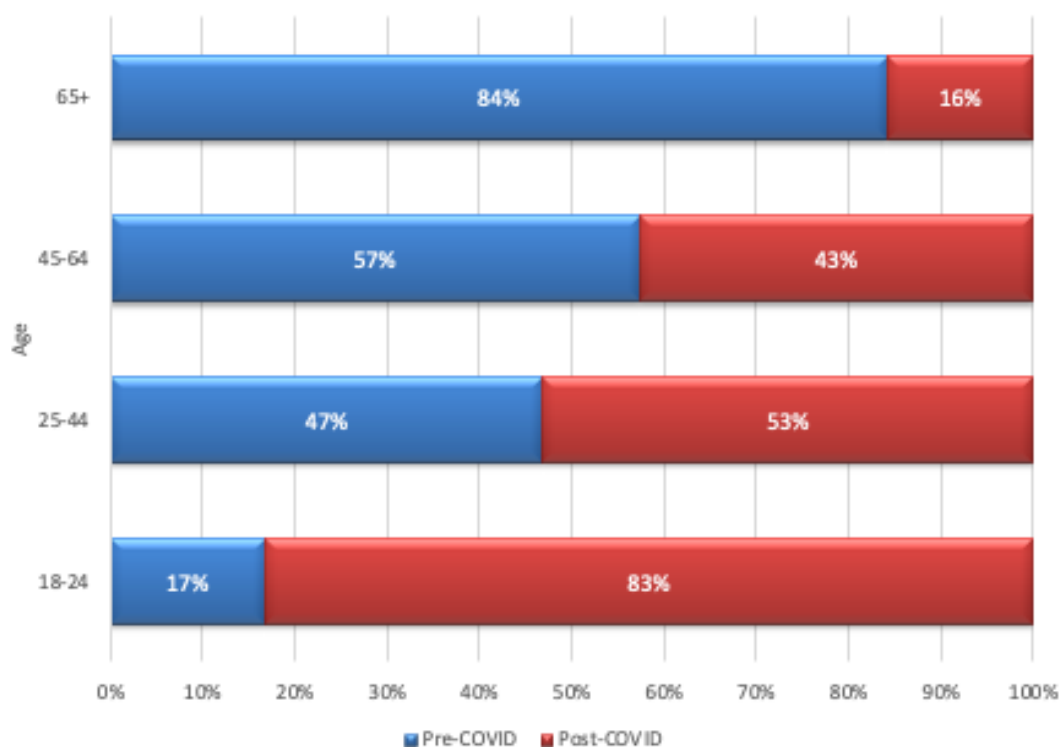
Fig. 6: Pre/Post-COVID internal migration by percentage in each age category (n=414)

People under 45 years of age, were significantly more likely to have relocated post-COVID, while those aged 45 and over were more likely to have moved pre-COVID.

These differences were most pronounced at the polar ends of the age spectrum. For example, only 17% of 18–24-year-olds surveyed had migrated to the regions before restrictions associated with the pandemic commenced, compared to 83% after the pandemic. For older internal migrants the opposite was true, with 84% of those aged 65 and over moving pre-COVID and only 16% post-COVID.

Overall, the highest proportion of post-COVID movers were in the 25-44 age group, who comprised 57% of all internal migrants to move after the first lockdown was imposed on Victorians (not shown in figure above). This marks a significant shift from previous COVID-era data, in which 45–64-year-olds consistently represented the largest age cohort to migrate regionally[2].

There was also a significant relationship between income and whether people migrated before or after the pandemic. 42% of all respondents who moved pre-COVID were in the lowest income bracket (<$60,000 p.a.) and were generally more likely to have moved pre-COVID than all other income groups.

People earning between $60,000-$99,999 p.a. made up the largest proportion of internal migrants who moved in the post-COVID period (32%), followed by people earning between $100,000-149,999 p.a. (23%). Although they comprised only 18% of overall post-COVID migrants, 61% of people earning over $150,000p.a. chose to migrate after the first lockdown came into force – the largest percentage within any income category.
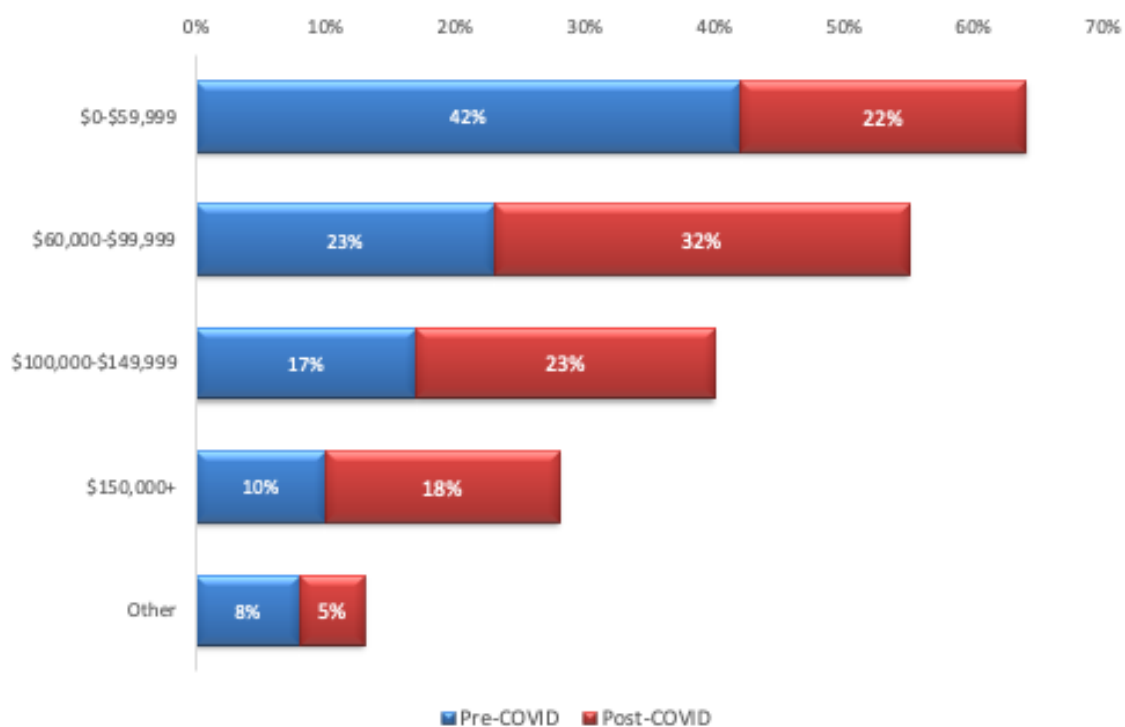
Fig. 7: Breakdown of pre/post-COVID internal migration by income (n=416)

Did people intend to move prior to the pandemic?

Of those survey respondents who moved *after* the first Victorian lockdown, a significant majority (68%) indicated that they already had intentions to move regionally prior to the outbreak of the Covid-19 pandemic. Almost a third of respondents (32%) had *no* intention to move regionally prior to the first lockdown coming into effect.

These findings suggest that for most internal migrants there was an existing desire to settle in regional Victoria prior to COVID-19, though the pandemic may have accelerated the decision to move. However, for almost a third of people, COVID-19 and most likely the associated restrictions, appears to have catalysed an opportunity to act on a previously unconsidered course of action.

People who *agreed* with the statement: *I had intentions to move to regional or rural Victoria prior to the Covid-19 pandemic*, were more likely to have migrated to rural Victoria (54%), than to a regional city (32%), or to a peri-urban area (14%). This may indicate that lifestyle factors associated with rural Victoria, were a significant pull factor for those thinking about moving to the regions for some time prior to COVID-19.

People who *disagreed* with the statement were more likely to have come from interstate rather than from metropolitan Melbourne. It should be noted, however, that the interstate cohort reflects a relatively small proportion of the overall internal migration sample, so it is difficult to draw conclusions about this finding.
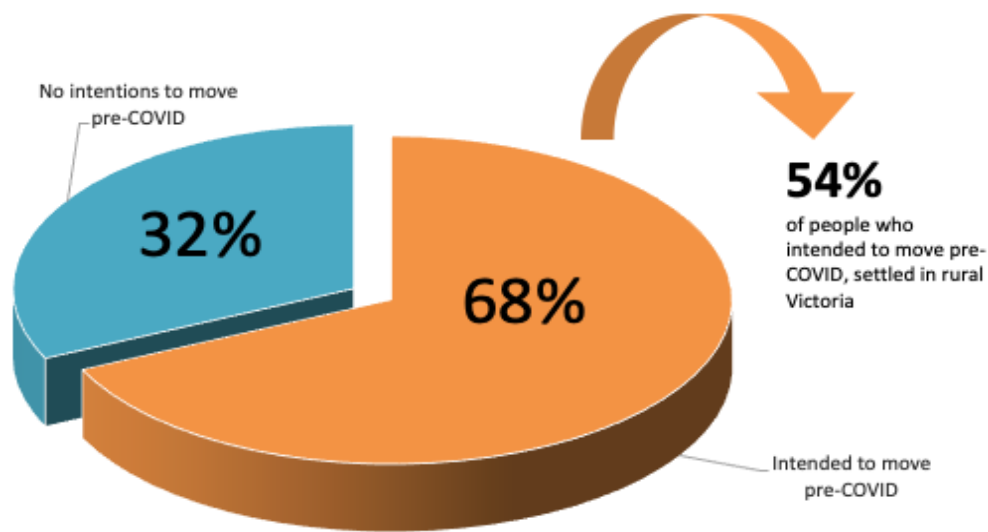
Fig. 8: Pre/Post-COVID intentions to move to regional Victoria (n=195)

Did people have existing ties to the region that they moved to?
Respondents were asked if they had existing ties to the region they were migrating to, for instance, they may have been raised, studied, worked, or previously holidayed in the region. Most people (67%) indicated that they had no pre-existing ties to the place they were migrating to, while a third (33%) did have some established ties with the region they had chosen to settle in.

Very little is known about the intensity of migration patterns of 'return migrants' - people who are moving back to areas that they have some prior connection to. However, previous research does suggest that these individuals are often motivated by very different factors, particularly the importance of returning to existing social relationships[3]. Peoples' motivations for moving regionally are explored in the following section.
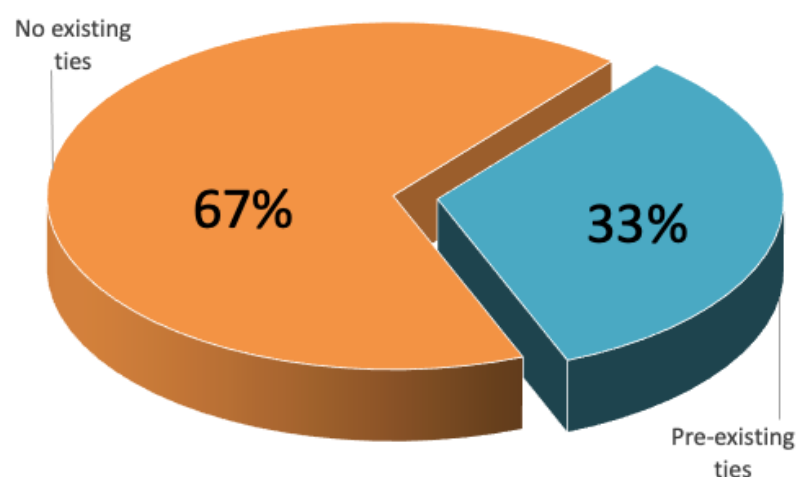

Fig 9: Respondents' ties to their settlement destination (n=416)

2. MOTIVATIONS

Why are people migrating to regional Victoria?

The top three reasons survey respondents selected as a significant influence on their decision to migrate regionally were: *better lifestyle/amenity (73%), being closer to the natural environment (63%)*, and *housing affordability (52%)*. Factors such as *raising a family (31%)*, *fewer Covid-19 restrictions (24%), and being closer to family and friends (22%)* were less significant influencers on migration choices, while r*etirement (18%), job opportunity (17%),* and *caring for a loved one (7%),* were ranked the lowest.

connectedness. *Better lifestyle/amenity* was more likely to be rated as a significant influence by internal migrants relocating to rural Victoria (54%) than those who moved to a regional city (31%) or peri-urban area (15%).

Previous research on internal migration has shown that people seek out green spaces with access to water and topographical variation[4], so it is perhaps not surprising to see *being closer to the natural environment* ranked as the second most significant influence on peoples' decision-making.
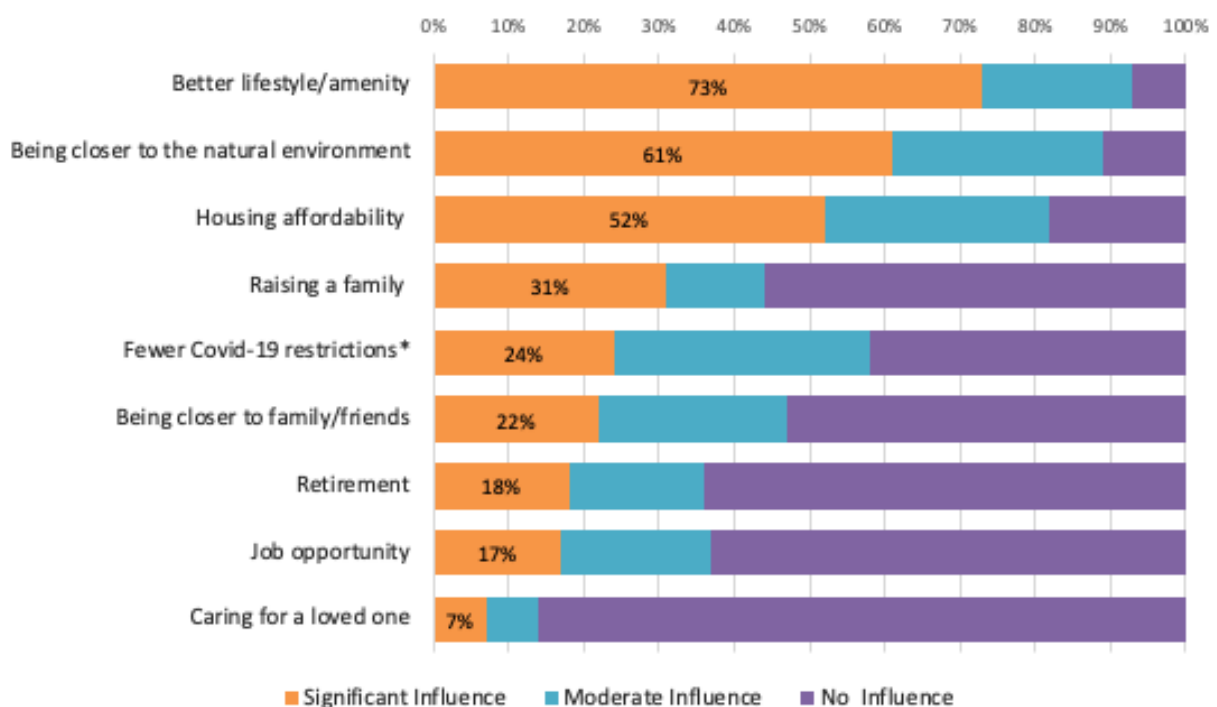
Fig. 10: Internal migrant motivations for moving to regional Victoria (n=416/*n=195)

Better lifestyle and amenity incorporates aspects of the physical, cultural, and situational dimensions of regional areas. This includes factors such as perceived attractiveness, more relaxed living, access to services, access to arts and culture, transport connectivity, and social

Respondents who migrated to a rural destination were also more likely to rate *being closer to the natural environment* as a significant influence on their decision to move regionally (58%) than those who moved to a regional city (27%), or a peri-urban region (15%).

Although *housing affordability* was rated as the third most significant influence on peoples' decision-making, it ranked some 21% behind *better lifestyle/amenity.* This finding suggests that while housing affordability is important, it is more likely to be an enabler than the primary driver of internal migration. For example, metropolitan homeowners may have been in a position to capitalise on their existing housing equity in order to purchase homes in regional Victoria that align with their lifestyle preferences.

Raising a family was the fourth most significant influence in peoples' decision to migrate regionally. 84% of those who rated this category as highly significant were aged 25-44. *Raising a family* was also more likely to be rated as a significant influence for those who moved *after* the first Victorian lockdown was announced, which suggests that Covid-19 may have had some impact on the priorities of those with families.
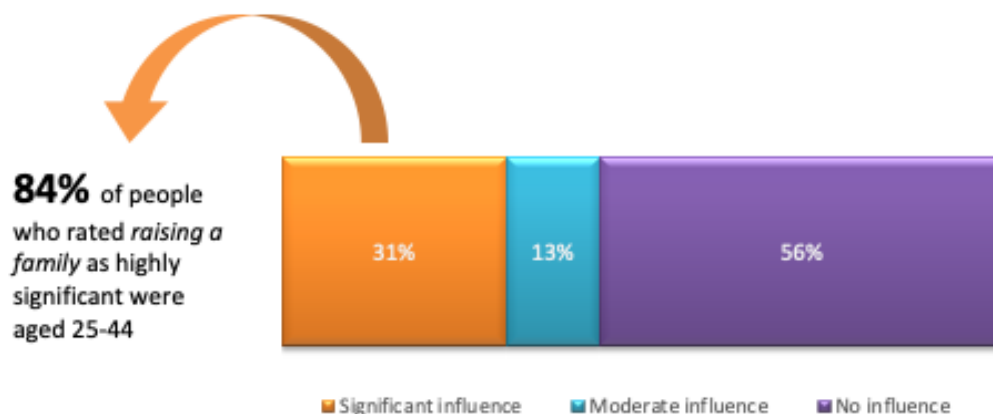

Fig. 11: Extent to which *Raising a family* influenced peoples' decision to migrate (n=416)

Additionally, while lifestyle and amenity factors are relevant to *all* internal migrants, only those who are looking to purchase a property will be immediately concerned with housing affordability. It is likely that a proportion of respondents may be renting in regional Victoria, or have moved into their holiday homes, so they will be less immediately concerned with housing affordability issues.

Respondents who moved to a rural area were less likely to view *housing affordability* as a significant motivator for internal migration to the regions.

Of those respondents who migrated to the regions *after* the first Victorian lockdown was announced, almost one quarter (24%) indicated that *fewer Covid-19 restrictions* was a significant influence on their decision making. Those in the lowest income category (<$60,000 p.a.) were less likely to consider Covid-19 an influencing factor than those in higher income categories. This may partially be explained by the finding that 67% of 18–24-year old's and 78% of those aged 65+ were situated in the lowest income category, and factors such as job opportunities and retirement may be more influential to migration decision-making.

This contention is supported by the finding that people aged 18-25, were significantly more likely to attribute a *job opportunity* as being as a significant influence behind their decision migrate regionally. The influence attributed to the *job opportunity* category declined as a respondents' age increased, such that it was least significant to those aged over 65.

Although *retirement* is often considered as an important life-stage factor informing the decision to migrate away from a metropolitan area, it was only ranked as a significant influence by 18% of those surveyed. This is despite the 60 and over age group comprising 21% of the surveyed population.

People who selected *retirement* as highly influential were significantly more likely to have moved to the regions prior to the COVID-19 pandemic, and they were less likely to rate *job opportunity or raising a family* as important to their decision making.

Fig. 12: Extent respondents have felt welcomed by the local community (n=416)

3. PEOPLES' EXPERIENCE OF REGIONAL LIVING

How welcomed have internal migrants felt?

Survey respondents were asked to what extent they agreed with the statement: *Overall, I have felt welcomed by the local community.* A significant percentage of people either strongly agreed (48%) or somewhat agreed (37%) with the statement, with only a very small number disagreeing to some extent (5%), and 10% neither agreeing nor disagreeing.

Overall, this finding suggests that internal migrants have had a very positive experience of their new regional communities. Females were significantly more likely to *strongly agree* with the statement (53%) than males (40%), which may, in part, reflect the general tendency of females to build more intimate and fewer transactional social relationships than men[5]. The highly positive ratings were otherwise consistent regardless of which region people migrated to, how long they had been living regionally, and whether they had existing ties to the region.
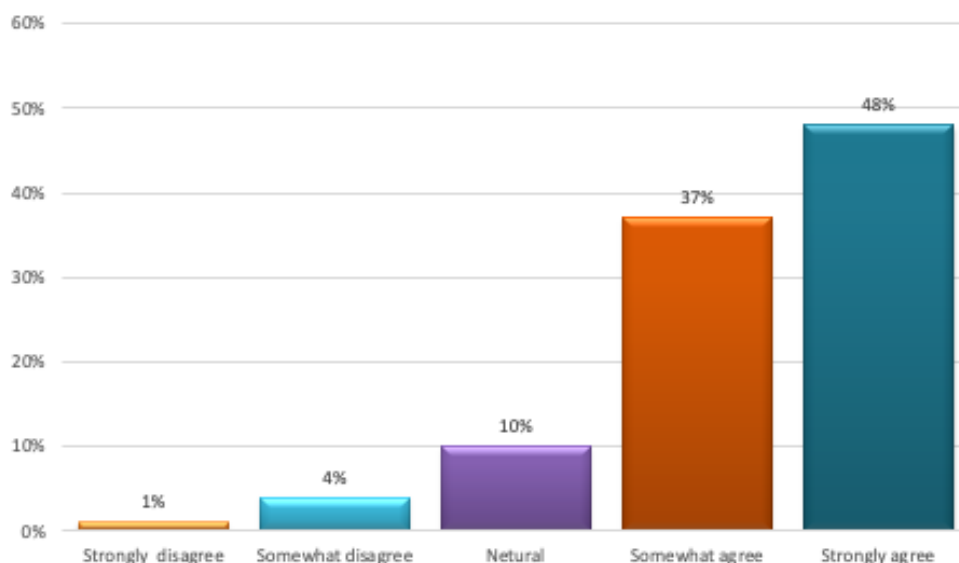
Do internal migrants want to make stronger connections?

Survey respondents were also asked the extent to which they agreed with the statement: *I would like to make stronger connections with my local community.* A majority of people either strongly agreed (41%) or somewhat agreed (44%) with the statement, which suggests a positive desire on behalf of internal migrants to deepen their connections with their new regional communities.
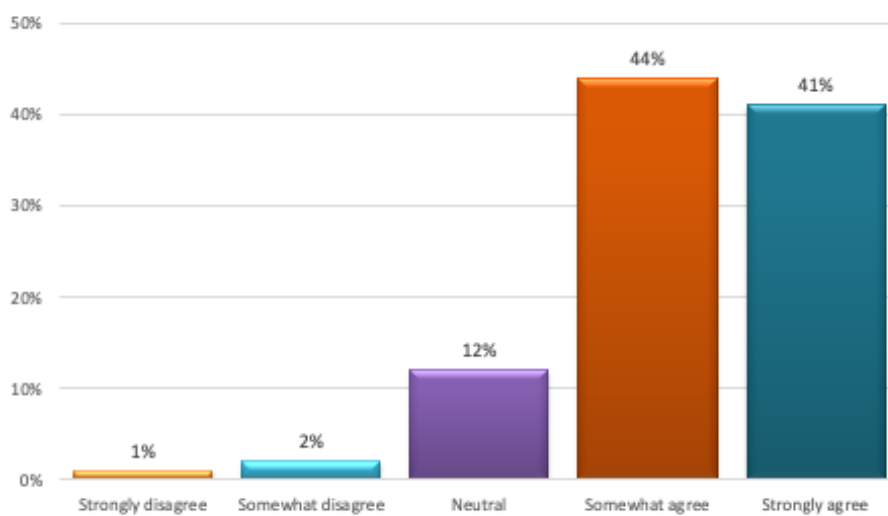

Fig. 13: Extent respondents would like to make stronger connections with their community (n=416)

A very small number of those surveyed disagreed with the statement to some extent (3%), and a further 12% neither agreed nor disagreed.

There was a positive relationship between the year people moved and their agreement with the statement; that is, the more recent a migrant they were, the more highly respondents were to rate the importance of strengthening ties to the community. This is consistent with the observation that people who are more recent migrants will still be in the early stages of building a community network,

and are therefore more likely to seek out new relationships than those who migrated some years earlier. Statistically, whether people had existing ties to a region had no bearing on their desire to make stronger connections with their community.

How difficult has it been to make friendships?

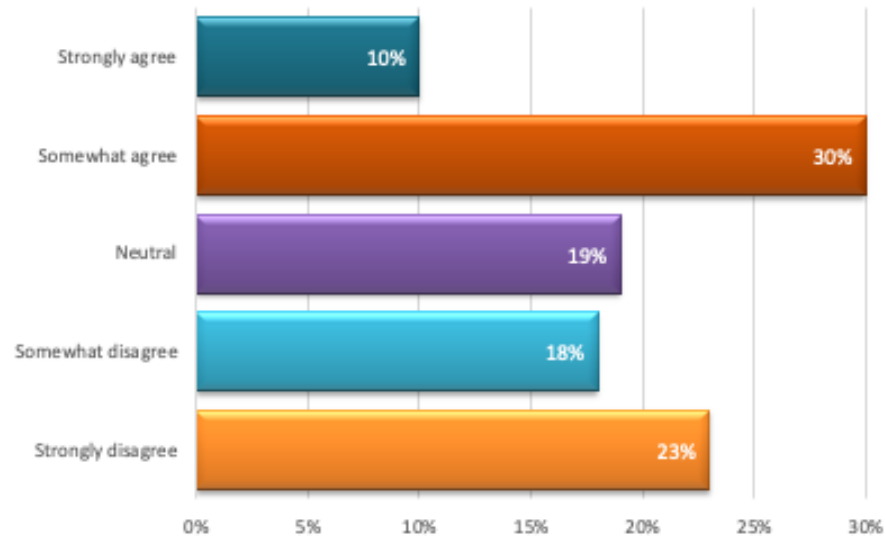Survey respondents were also asked about the challenges of making friendships regionally. Specifically, they were asked to what extent they agreed with the statement: *I've found it hard to make friendships since I moved regionally.*

Responses to this question were mixed, with 40% of people agreeing and 41% disagreeing with the statement, either strongly or somewhat. A further 19% neither agreed nor disagreed with the statement.

There were some differences noted between older internal migrants and younger survey respondents on the challenge of making friendships. 42% of people aged over 65, strongly disagreed with the premise that they had struggled to make friendships since their regional move, the highest percentage of any age group. This may partly reflect the fact people who were 65 or older displayed a higher inclination towards volunteerism which fosters greater opportunities for social connection (see fig. 15 below).

Fig. 14: Extent respondents have struggled to make friendships since moving regionally (n=416)

Internal migrants who had moved to a regional city were more likely to strongly agree with the statement than their rural living counterparts. This is consistent with the greater anonymity afforded by more populous regional centres, which can necessitate more intentional efforts to build friendships than those in smaller, rural settlements.

How likely are internal migrants to volunteer?
Survey respondents were also asked about their propensity for volunteerism. Specifically, they were asked to what extent they agreed with the statement:

I currently volunteer, or intend to become a volunteer, in the local community. 54% of respondents either strongly agreed or somewhat agreed with the statement, 19% disagreed to some extent, and 27% were neutral about volunteerism.

In Victoria, almost one third of people (32%) formally volunteer in an organisation[6]. This is broadly consistent with the survey sample which suggests that 24% have a strong inclination toward volunteering in their new regional communities.
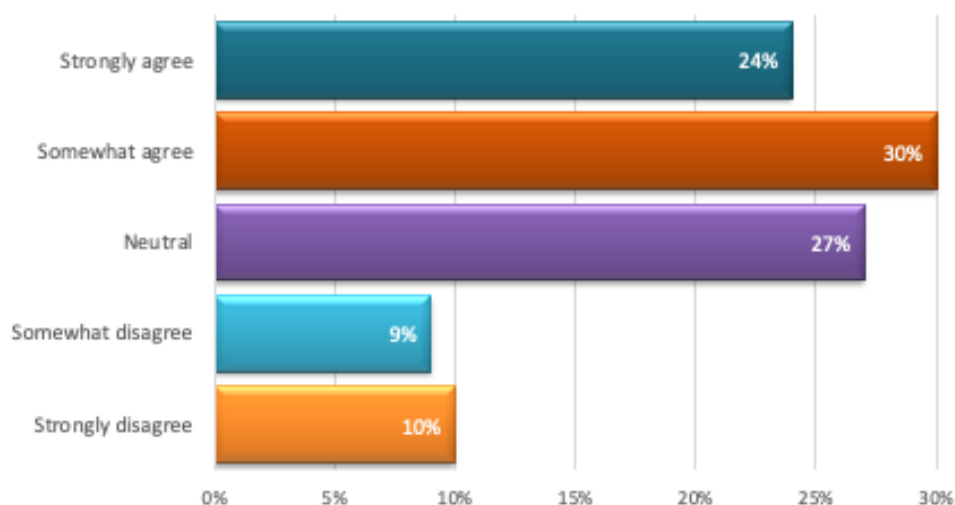

Fig. 15: Internal migrants' proclivity toward volunteerism (n=416)

A further 30% exhibited a more moderate desire, which suggests that there is significant potential to encourage greater volunteerism in regional communities. Overall, there were no significant differences between propensity towards volunteerism and factors such as gender and employment status. However, there was a positive relationship between age and volunteerism, with people, on average, more likely to agree with the statement as age increased.

How important are strong community ties to future decision-making?
Survey participants were asked whether: *Having strong ties with the local community is an important factor in helping me decide whether I continue to live regionally.* In aggregate, 58% of respondents either strongly or somewhat agreed with the statement, a quarter (25%) were neutral, and a total of 17% of people disagreed either strongly or somewhat.

These results suggest that whilst strong community ties are a factor for a majority of the surveyed population to some extent, they are only highly significant for just over a quarter of respondents (27%). So, while internal migrants have previously expressed a strong desire to deepen their ties with their new regional communities, the development of these ties does not appear to be critical to future decision-making about continuing to live regionally for most people.

Residents who had no prior ties to the region were more likely to *strongly disagree* that community connection was an important factor in their future decision-making than those who had existing ties to the region. The length of time that respondents had lived regionally did not significantly influence the response to this question.
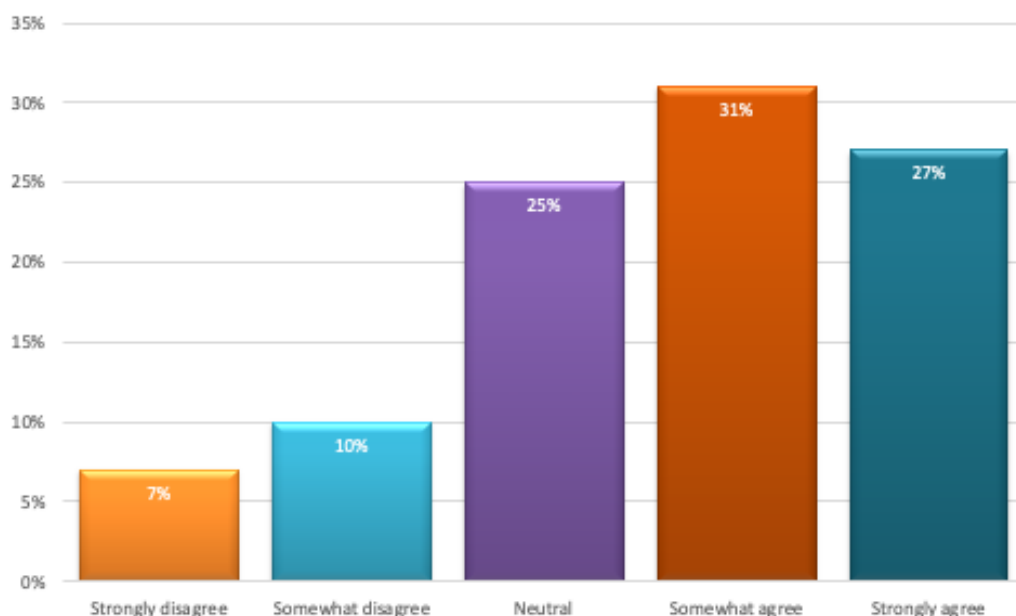

Fig. 16: Importance of community ties to future decision making (n=416)

How satisfied are internal migrants with their move?

Finally, survey respondents were asked about their overall levels of satisfaction with their move to regional Victoria. Specifically, they were asked: *Overall, how satisfied would you say you are with your decision to move regionally?*

An overwhelming majority of respondents were *extremely satisfied* with their move to regional Victoria (75%), with a further 21% *moderately satisfied.* Only 2% of the surveyed population expressed some level of *dissatisfaction*, and a further 2% were *neither satisfied nor unsatisfied.*

These findings suggest that the migration to regional Victoria has been a very positive experience for most respondents, with few people having regrets about their decision to do so.

On average, there is very little difference in satisfaction levels between those who moved in 2016 from those who moved more recently, suggesting that satisfaction with regional migration is stable over time.

There is a positive relationship between age and satisfaction, with satisfaction marginally increasing with age.

Those least likely to be *extremely satisfied* with their decision to move came from interstate. Only 40% of interstate movers gave the highest satisfaction rating, far lower than those who moved from outer Melbourne (86%) or inner Melbourne region (76%).
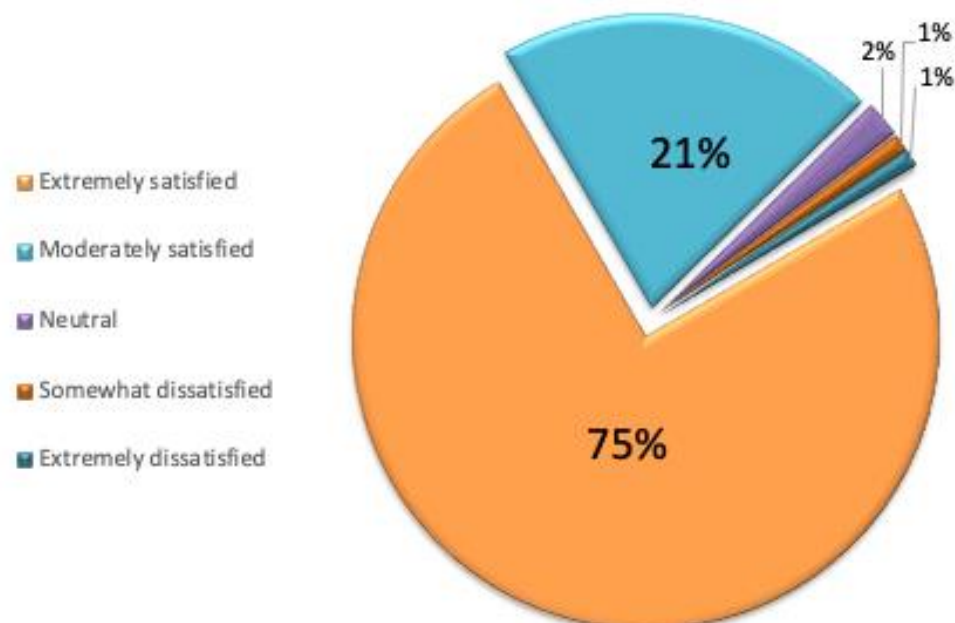

Fig. 17: Overall levels of satisfaction with the migration to regional Victoria (n=416)

4. DEMOGRAPHIC INFORMATION

Age
Survey participants represented a broad age spectrum, however, there were significantly fewer people aged 24 and younger (3%) when compared to those aged 60 years of age and older (21%). The highest single category was people aged 35-39 years (16%), while 30–44-year-olds comprised 43% of the overall survey population. Age data was not available two respondents.
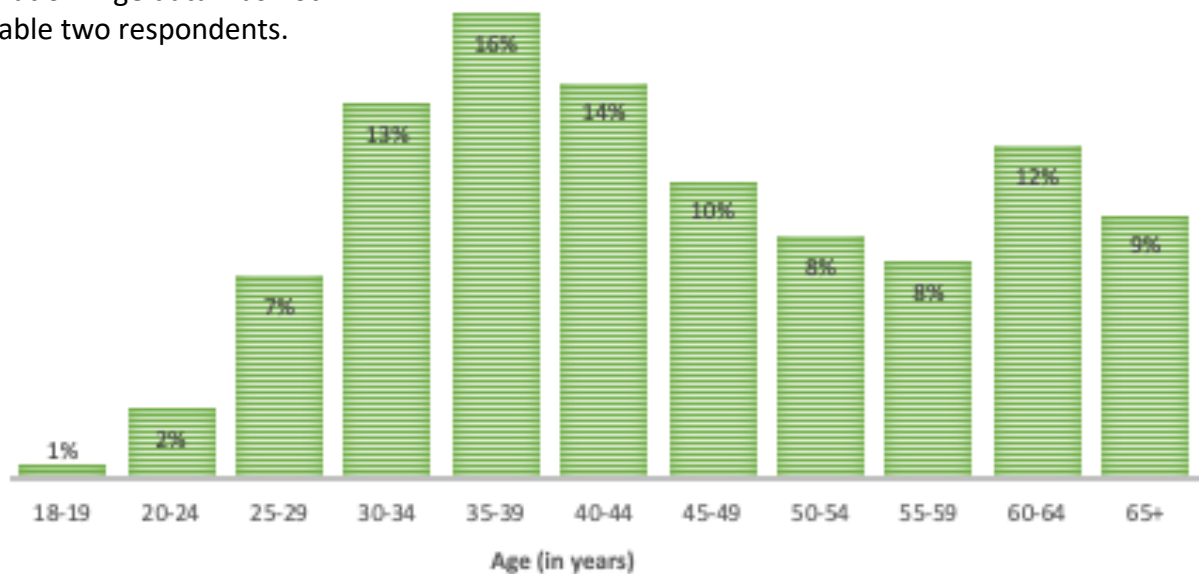

Fig. 18: Age of survey respondents (n=414)

Gender
The majority of survey participants identified as female (65%), with 32% identifying as male, and 1% as non-binary. A further 2% selected to not disclose their gender.
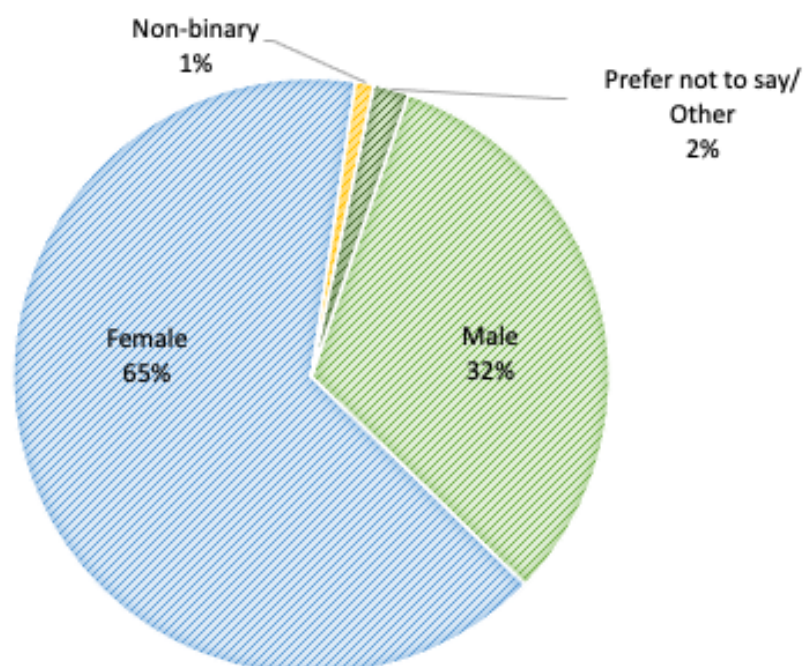

Fig. 19: Gender of survey respondents (n=416)

Income

33% of survey respondents earned less than $60,000 p.a. and at least 26% of the survey population was earning under the annual median income of $51,389 p.a.[7]. Those aged 65 and older were disproportionally represented in the lowest income category, with 78% earning less than $60,000 p.a. 79% of people within the lowest income category were women.

Fig. 20: Annual income of survey respondents in the previous financial year (n=416)

Overall, 60% of respondents were earning less than $100,00 p.a. with only 34% of the survey population earning over $100,000 p.a. Only 10% of females were in the highest income category, as compared with 24% of males.

Occupation

88% of the surveyed population was currently (or recently) employed. Of these, the majority were employed as professionals (66%), followed by clerical/administrative workers (11%), and managers (10%). The remaining categories consisted of community/personal service workers (6%), sales workers (3%), technician/trade workers (2%), and labourers (1%).

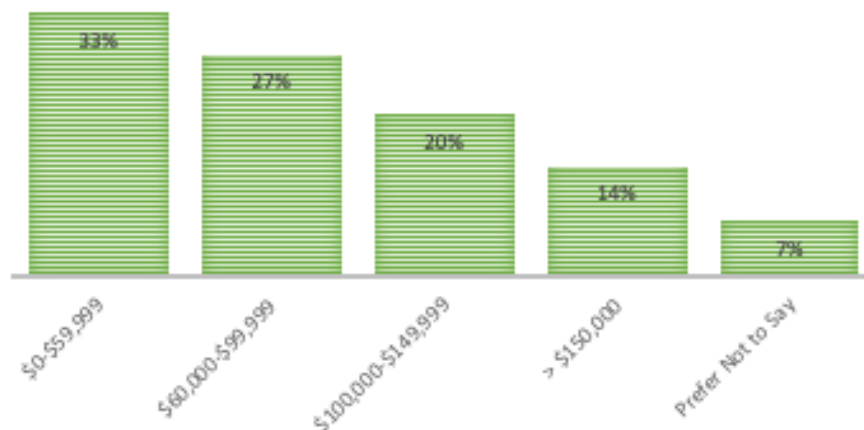Respondents who were in the occupational group *professionals*, were more likely to be in the $100,000-$149,999 income category. Those identifying as *managers* were more likely to be in the highest income group.
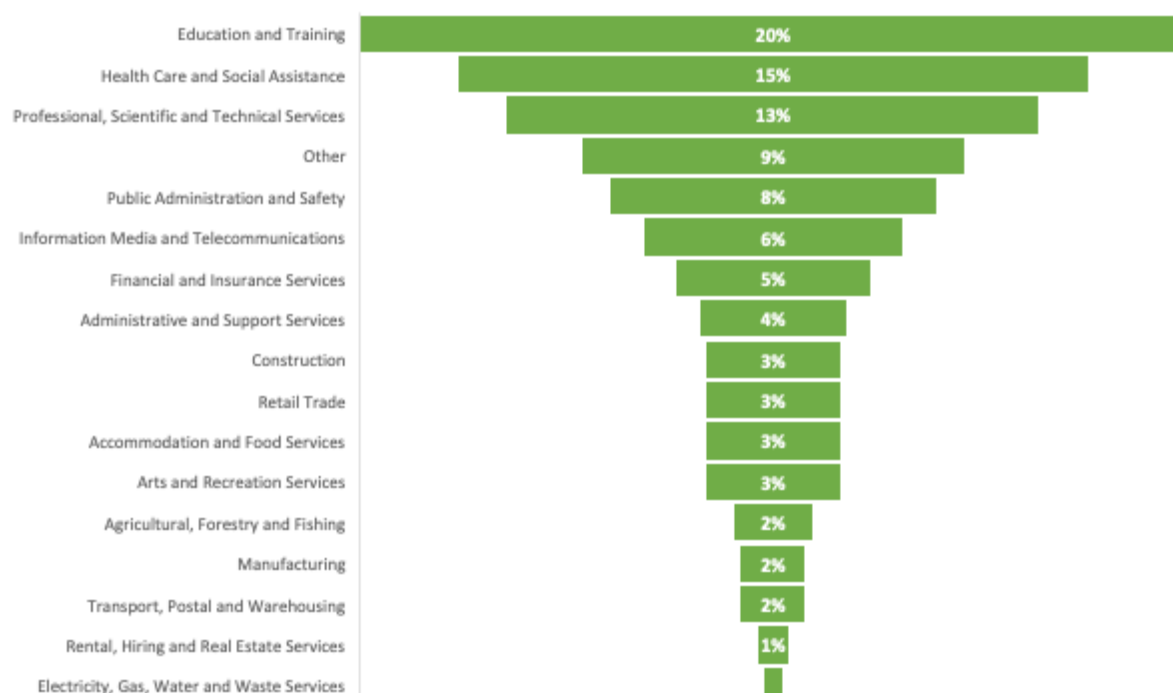

Fig. 21: Survey respondents by occupational group (n=365)

18

| Industry	%
Education and Training	20%
Health Care and Social Assistance	15%
Professional, Scientific and Technical Services	13%
Other	9%
Public Administration and Safety	8%
Information Media and Telecommunications	6%
Financial and Insurance Services	5%
Administrative and Support Services	4%
Construction	3%
Retail Trade	3%
Accommodation and Food Services	3%
Arts and Recreation Services	3%
Agricultural, Forestry and Fishing	2%
Manufacturing	2%
Transport, Postal and Warehousing	2%
Rental, Hiring and Real Estate Services	1%
Electricity, Gas, Water and Waste Services	

Fig. 22: Survey respondents by industry (n=365)

Employment Industry

The largest segment of the survey population came from the Education and Training sector (20%), followed by Healthcare and Social Assistance (15%), and the Professional, Scientific and Technical Services (13%). Females were more likely to be employed in the *Education and Training* and *Healthcare* sectors than men, while males were more likely to be employed in *Public Administration* and *Construction.*

Employment Type

The survey population consisted of a significant proportion of people employed in a permanent or ongoing role (56%). This was followed by people who were self-employed (15%), and those employed on a fixed-term basis (13%). Casual employees made up 8% of respondents, and 6% were employed part-time.

Fig. 23: Survey respondents by employment type (n=365)
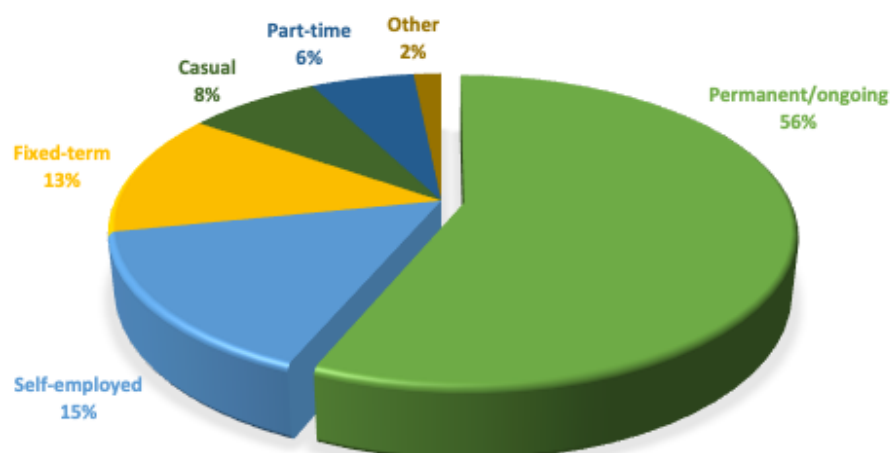
People who were employed on a casual or part-time basis and those who were self-employed, were significantly more likely to be earning less than $60,000 per annum, than those in other income groups. Unsurprisingly, people employed in permanent/ongoing roles were significantly more likely to be earning over $100,000 per annum.

Education
The survey respondents reflect a highly educated population, 69% of whom have attained a degree or higher qualification. This exceeds the national average of 50% by a considerable margin[8].

Females were more likely to have attained a post-graduate education, and males an undergraduate education. Males were also significantly more likely to have a secondary school certificate as their highest educational attainment.

There were some notable migration patterns with regards to education. Survey respondents who were diploma-qualified were more likely to have moved from an outer Melbourne area and settled in rural Victoria. People who had attained a vocational qualification were more likely to have settled in a peri-urban region, while people with an undergraduate degree were more likely to settle in a regional city.
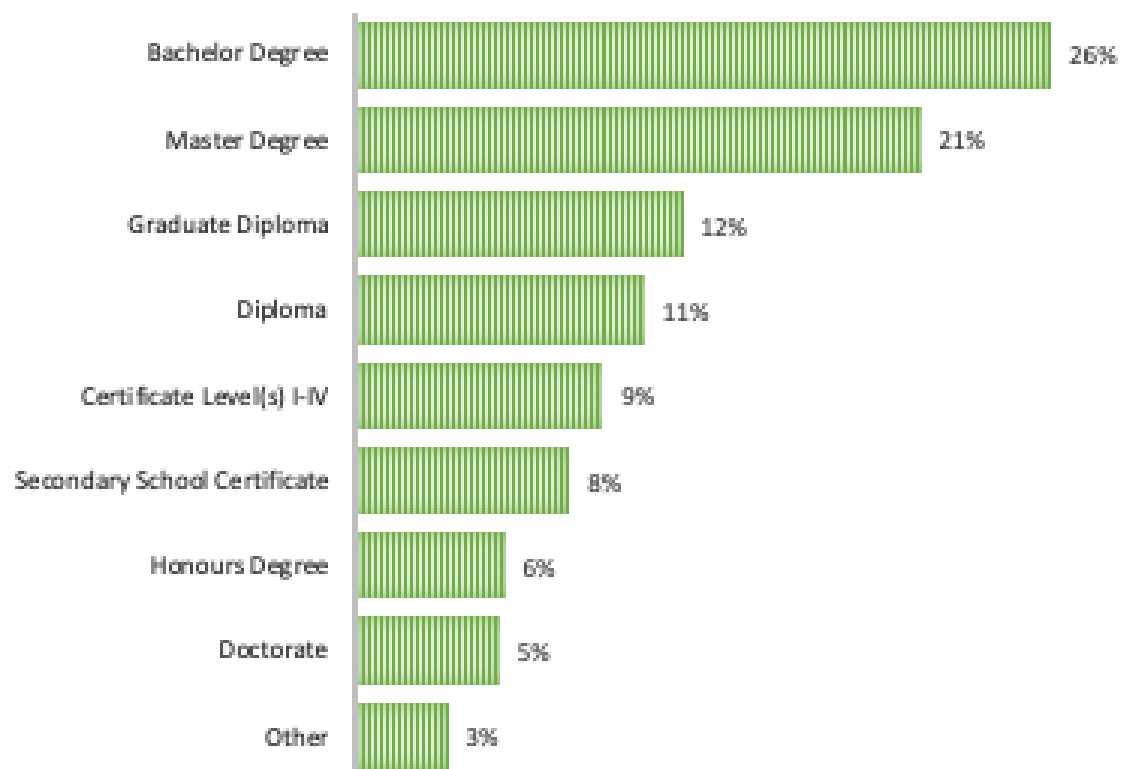

Fig. 24: Survey respondents by highest educational attainment (n=416)

ABOUT THE SURVEY

The Future of Work Lab's Regional Migration survey was conducted between October-December 2021. The survey was designed to better understand the five dimensions of migration (intensity, who moves, when, where and why), and how these factors intersect with the way we work now and into the future.

The survey responses were collected through an anonymous survey link, using the Qualtrics survey tool. Over 500 responses were received, however, for data quality purposes this survey uses 416 unique data points.

It should be noted that the report is only concerned with the movement of people from Australian cities to regional areas in Victoria.

It does not consider other modes of internal migration such as regional to regional, or regional to city migration.

The regional classifications adopted in this report correspond to the Local Government Areas defined by the Victorian State Government.

This report is the first instalment of three in our regional migration series. Any enquires regarding the survey can be directed to the Future of Work Lab by contacting futureofwork-info@unimelb.edu.au.

ACKNOWLEDGEMENTS

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