

ECONOMIC OUTLOOK REPORT 4



RIO | regional
investment
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A PROJECT OF
THE MURRAYLANDS REGIONAL DEVELOPMENT BOARD INC

Murraylands Economic Outlook Report 4: Standard Economic Analysis

A report prepared for



Prepared by



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Contents

List of Tables	iv
List of Figures	iv
Abbreviations	vi
Document History and Status	vii
1. Introduction.....	1
2. Demographic Profile.....	4
2.1 Estimated Resident Population	4
2.2 Crude Birth Rates and Death Rates.....	5
2.3 Age Distribution.....	6
2.4 Population Change.....	8
2.5 Population Projections	9
3. Labour Force Indicators	11
3.1 Labour Force.....	11
3.2 Unemployment.....	12
3.3 Unemployment Rate	13
3.4 Participation Rate.....	13
4. Education and Training	15
4.1 School Students.....	15
4.2 Qualifications.....	16
4.3 University Enrolments	17
4.4 Contracts of Training.....	21
5. Income.....	23
5.1 Annual Taxable Income	23
5.2 Income Source	26
6. Building Approvals.....	30
7. Motor Vehicles.....	32
7.1 New Motor Vehicle Sales	32
7.2 Motor Vehicle Registrations	32
8. Local Government Finance	34
9. Business Registrations.....	36
10. Value of Food Production.....	38
11. Tourism	40
12. Gross Regional Product	43
References	44

List of Tables

Table 2.1	Age distribution of the population for the Murraylands and South Australia, 2001 and 2006	7
Table 2.2	Age distribution of the population for the Murraylands and South Australia, 1999/00 to 2005/06	7
Table 2.3	Population change, Murraylands and South Australia, 2001 and 2006	8
Table 2.4	Population projections for the Murraylands and SA, 1996 to 2021	9
Table 4.1	School enrolment in the Murraylands and SA, 1996, 2001 and 2006	16
Table 4.2	Highest level of qualifications for persons aged 15 and over in the Murraylands and SA, 1996, 2001 and 2006 ^a	17
Table 4.3	Higher education enrolments for the Murraylands and South Australia, 1996, 2001 and 2006	20
Table 5.1	Taxable individuals and taxable income in the Murraylands and SA, 1997/98 to 2005/06	24
Table 5.2	Total income and some of its components for the Murraylands and SA, 1997/98 to 2005/06	27
Table 7.1	New motor vehicle sales in the Murraylands and SA, 2001/02 to 2003/04	32
Table 7.2	Motor vehicle registrations in the Murraylands and SA, 2002/03 to 2006/07	33
Table 9.1	Single location business registrations in the Murraylands and SA, 2001	36
Table 12.1	Gross regional production in the Murraylands and SA, 2002/03 to 2006/07	43

List of Figures

Figure 1.1	The Murraylands region	3
Figure 2.1	Estimated resident population in the Murraylands and SA, 1997/98 to 2006/07	4
Figure 2.2	Crude birth rates in the Murraylands and SA, 1999/00 to 2005/06	5
Figure 2.3	Crude death rates in the Murraylands and SA, 1999/00 to 2005/06	6
Figure 2.4	Population projections for the Murraylands and SA, change from 2001	10
Figure 3.1	Labour force in the Murraylands and SA, 2002 to 2007	11
Figure 3.2	Unemployed persons in the Murraylands and SA, 2002 to 2007	12
Figure 3.3	Unemployment rate in the Murraylands and SA, 2002 to 2007	13
Figure 3.4	Participation rate in the Murraylands and SA, 2002/03 to 2005/06	14
Figure 4.1	University enrolments by students from the Murraylands and SA, 2002 to 2007	18
Figure 4.2	University enrolments by level of study, Murraylands, 2002 to 2007	19
Figure 4.3	University enrolments by level of study, SA, 2002 to 2007	19

Figure 4.4	Contract of training commencements in the Murraylands and SA, 2000/01 to 2007/08	21
Figure 4.5	Contract of training completions in the Murraylands and SA, 2000/01 to 2007/08	22
Figure 5.1	Nominal mean individual taxable income in the Murraylands and SA, 1997/98 to 2005/06	25
Figure 5.2	Real mean individual taxable income in the Murraylands and SA, 1997/98 to 2005/06 ^a	25
Figure 5.3	Commonwealth benefits and payments in the Murraylands and SA, 1997/98 to 2005/06	28
Figure 5.4	Salaries and wages in the Murraylands and SA, 1997/98 to 2005/06	28
Figure 5.5	Other income in the Murraylands and SA, 1997/98 to 2005/06	29
Figure 5.6	Gross tax in the Murraylands and SA, 1997/98 to 2005/06	29
Figure 6.1	Number and value of new residential dwelling approvals in the Murraylands, 2001/02 to 2006/07	30
Figure 6.2	Number and value of new residential dwelling approvals in SA, 2001/02 to 2006/07	31
Figure 6.3	Average value per approval in the Murraylands and SA, 2001/02 to 2006/07	31
Figure 8.1	Local government outlay in the Murraylands, 1997/98 to 2005/06.....	34
Figure 8.2	Local government outlay in SA, 1997/98 to 2005/06	35
Figure 10.1	Estimated gross value of food production in the Murraylands, 2001/02 to 2005/06	38
Figure 10.2	Estimated gross value of food production in SA, 2001/02 to 2005/06	39
Figure 11.1	Rooms occupied and takings in the Murraylands, 2003 to 2007.....	40
Figure 11.2	Room occupancy rate in the Murraylands and SA, 2003 to 2007	41
Figure 11.3	Takings per room in the Murraylands and SA, 2003 to 2007	41



Abbreviations

ABS	Australian Bureau of Statistics
ATO	Australian Taxation Office
DEST	Department of Education, Science and Training
DECS	Department of Education and Children's Services
DEWR	Department of Employment and Workplace Relations
DFEEST	Department of Further Education, Employment, Science and Technology
ERP	estimated resident population
fte	full-time equivalent
GSP	gross state product
GRP	gross regional product
IO	Input-Output (analysis)
MRDB	Murraylands Regional Development Board
PIRSA	Primary Industries and Resources South Australia.
RIO	Regional Investment Opportunities
RISE	Regional Industry Structure and Employment (impact model)
SA	South Australia



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1. Introduction

EconSearch Pty Ltd was contracted by the Murraylands Regional Development Board Inc to prepare a set of Economic Outlook report to provide investors, stakeholders and the community with an overview of the status of the Murraylands economy. The Murraylands Economic Outlook Reports consist of three key aspects, namely:

- Headline Analysis;
- Regional Investment Opportunities (RIO) Sector Analysis; and
- Standard Economic Analysis.

The aim of the Standard Economic Analysis, the subject of this report, is to present a statistical summary of key economic and social information for the Murraylands region and South Australia (SA).

This report brings together a wide range of existing Australian Bureau of Statistics (ABS) and some non-ABS data and has been designed, at a broad level, to assist users of regional statistics to understand the composition and economic and social structure of the region, to understand how the Murraylands region contributes to the state's economy and to help monitor the trends in economic growth or decline. Most data are presented for the Murraylands region and for SA as a whole for the purpose of comparisons. The regional economic indicators include:

- a demographic profile (Section Two);
- labour force statistics (Section Three);
- education and training statistics (Section Four);
- income data (Section Five);
- data on building approvals (Section Six);
- motor vehicle data (Section Seven);
- statistics on local government finance (Section Eight);
- statistics on single location business registrations (Section Nine);
- value of agricultural production (Section Ten);
- tourism data (Section Eleven); and
- gross regional product (Section Twelve).

The information included in this report is historical, as well as being the latest available data at the time of preparation, enabling comparison over time. When analysing the data care needs to be taken as time periods, definitions, methodologies, scope and coverage differ between variables. For detailed information, including technical notes, please refer to the relevant source publications that are listed in the References (page 44).

The Murraylands is located in eastern South Australia. The area includes the major centre of the City of Murray Bridge and many major towns including Mannum, Swan Reach, Blanchetown, Morgan, Tailem Bend, Meningie, Karoonda, Lameroo and Pinnaroo. The region covers 5 local government areas:

- District Council of Karoonda East Murray;
- Mid Murray Council;
- The Rural City of Murray Bridge;
- Southern Mallee District Council; and
- The Coorong District Council.

The Murraylands region and component local government areas are illustrated in Figure 1.1.



Figure 1.1 The Murraylands region



Source: Murraylands Regional Development Board Inc.

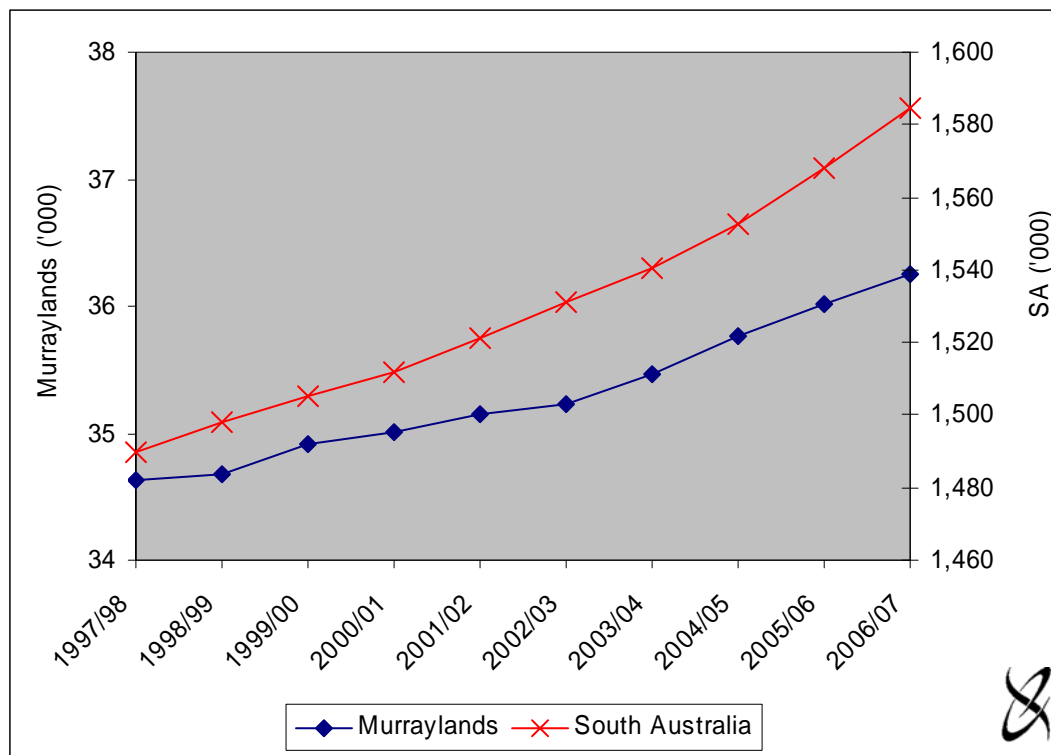
2. Demographic Profile

This section of the report provides descriptive and comparative statistics of key demographic characteristics relevant to the Murraylands and SA. The key demographic characteristics include most recent annual data on estimated resident population¹ (ERP), births, deaths and population age structure.

2.1 Estimated Resident Population

The ERP for the Murraylands and SA are illustrated in Figure 2.1, for the period 1997/98 to 2006/07.

Figure 2.1 Estimated resident population in the Murraylands and SA, 1997/98 to 2006/07



Source: ABS (2008a).

In 2006/07 the ERP in the Murraylands region was 36,253 persons, representing approximately 2.3 per cent of the state total (approximately 1,585,000 persons). Over the nine years, 1997/98 to 2006/07, Murraylands region experienced steady population growth, the total population increased by 4.7 per cent (1,616 persons). SA also experienced steady population growth over these years, with the population increasing by 6.4 per cent.

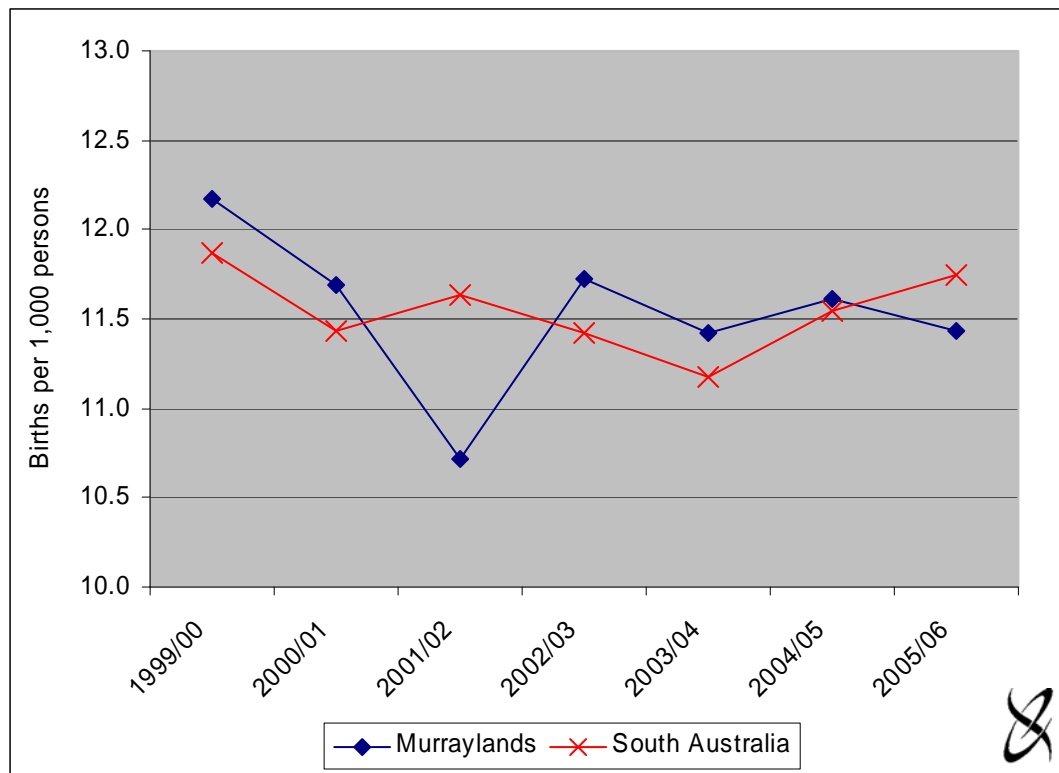
¹ The ERP of an area is the estimate of the number of persons who usually reside in that area irrespective of where they were on the date of the estimate. The ERP is the official ABS population figure and is calculated adjusting the results of the latest Census on Population and Housing.

Population growth in the Murraylands region was a result of an increase in the population of the Murray Bridge and Mid Murray local government areas and a slight decline in population in Karoonda East Murray, the Southern Mallee and the Coorong.

2.2 Crude Birth Rates and Death Rates

The crude birth rates² for the period 1999/00 to 2005/06 for the Murraylands and SA are illustrated in Figure 2.2.

Figure 2.2 Crude birth rates in the Murraylands and SA, 1999/00 to 2005/06



Source: ABS (2008a and 2007a).

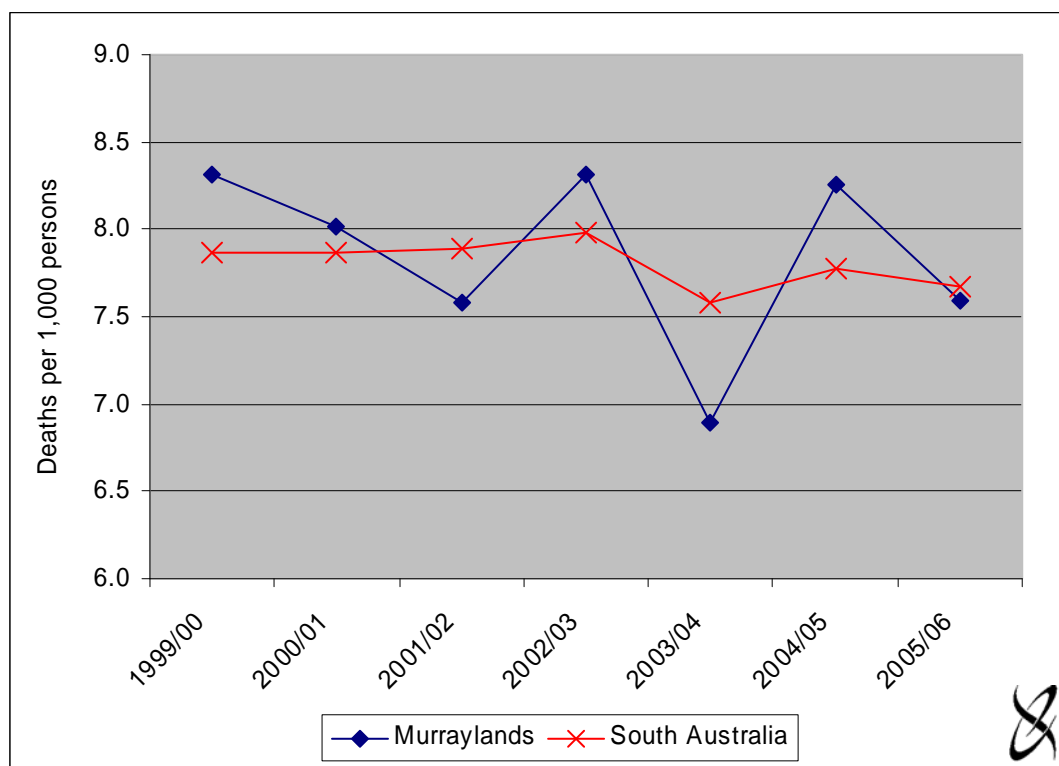
The number of births in the Murraylands region fell from 425 in 1999/00 to 376 in 2001/02 but has increased in subsequent years. The total number of births in the Murraylands region was 408 in 2005/06 and the crude birth rate was 11.4 births per thousand residents. The number of births in SA fell from 18,005 in 1999/00 to 17,140 in 2003/04. The number of births in SA has increased in subsequent years reaching 18,260 in 2005/06. The crude birth rate for SA fell from 11.9 to 11.2 between 1999/00 and 2003/04, but increased to 11.7 in 2005/06 (Figure 2.2).

In 2005/06, the highest birth rate in the Murraylands region was recorded in the Southern Mallee local government area where there were 15 births per 1,000 residents. The lowest birth rate was in the Mid Murray local government area where there were 7 births per 1,000 residents.

² The number of births are calculated on the basis of usual residence of the mother regardless of where in Australia the birth occurred. The crude birth rate is the number of live births registered in the 12 months ending 30 June per 1,000 residents. The number of residents is equivalent to the ERP.

The death rates³ for the period 1999/00 to 2005/06 for the Murraylands and SA are illustrated in Figure 2.3.

Figure 2.3 Crude death rates in the Murraylands and SA, 1999/00 to 2005/06



Source: ABS (2008a and 2007b).

The annual number of deaths in the Murraylands region fluctuated over the seven years to 2005/06, but generally following a decreasing trend. In 1999/00, there were 290 deaths in the region, while in 2005/06 there were 271. There were 11,843 deaths in SA in 1999/00 and 12,185 in 2002/03. Accordingly, the crude death rate for SA increased from 7.9 in 1997/98 to 8.0 in 2002/03. The number of deaths in SA decreased between 2002/03 and 2005/06 to 11,921, the corresponding death rate was 7.7 (Figure 2.3).

In 2005/06, the highest death rate in the Murraylands was in the Southern Mallee local government area where it was 10. The lowest death rate in the region was in the Karoonda East Murray local government area where there were 6 deaths per thousand residents.

2.3 Age Distribution

The age structures of the population for the Murraylands and SA for 2001 and 2006 (Census years) are summarised in Table 2.1.

³ The number of deaths are calculated on the basis of usual residence of the deceased, regardless of where in Australia the death occurred. The crude death rate is the number of deaths registered in the 12 months ending 30 June per 1,000 residents. The number of residents is equivalent to the ERP.

Table 2.1 Age distribution of the population for the Murraylands and South Australia, 2001 and 2006

Age	Murraylands		South Australia	
	2001	2006	2001	2006
0 to 14	7,327	6,848	287,648	280,825
15 to 64	21,670	22,076	966,662	1,000,381
65 or older	4,987	5,760	215,747	233,130
Total	33,984	34,684	1,470,057	1,514,336

Source: ABS (2007b)

Comparison with South Australia highlights some significant differences in changes in the age structure of the state and regional populations, between 2001 and 2006.

- Number of persons aged 0 to 14 years – decreased by 6.5 per cent in the Murraylands and 2.4 per cent in SA.
- Number of persons aged 15 to 64 years – increased by 1.9 per cent in the Murraylands and 3.5 per cent in SA.
- Number of persons aged 65 years or older – increased by 15.5 per cent in the Murraylands and 8.1 per cent in SA.

The population age structure is summarised on an annual basis for the years 1999/00 to 2005/06 in Table 2.2.

Table 2.2 Age distribution of the population for the Murraylands and South Australia, 1999/00 to 2005/06

Age	Year						
	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Murraylands							
0 to 14	21%	21%	21%	21%	20%	20%	20%
15 to 64	64%	64%	64%	64%	64%	63%	64%
65 or older	15%	15%	15%	15%	16%	17%	16%
Total	100%	100%	100%	100%	100%	100%	100%
South Australia							
0 to 14	19%	19%	19%	19%	19%	18%	18%
15 to 64	66%	66%	66%	66%	66%	66%	67%
65 or older	14%	15%	15%	15%	15%	15%	15%
Total	100%	100%	100%	100%	100%	100%	100%

Source: ABS (2007c)

The age distribution in the Murraylands reflects the higher than average birth rate identified above (Figure 2.2). In 2005/06, just under 20 per cent of the region's population was under the age of 15 years, the majority of the population (approximately 64 per cent) was aged between 15 and 64 years and approximately 16 per cent of the population was aged over 65 years (Table 2.2).

Compared with the age distribution of the state, the Murraylands has a higher concentration of both younger people (aged 0 to 14 years) and people aged 65 and over and consequently, a lower than average share of persons aged 15 to 64 years. This latter group could be characterised as the working-age population.

A notable shift in the age demographic of the population has occurred in the Murray Bridge local government area. Between 2001 and 2006 the total number of person aged 65 or over living in the Murray Bridge local government area, increased by 19 per cent.

2.4 Population Change

Population statistics for the Murraylands and South Australia are detailed in Table 2.3.

Table 2.3 Population change, Murraylands and South Australia, 2001 and 2006

	Census Year		% change from 2001
	2001	2006	
Murraylands Region			
Karoonda East Murray	1,207	1,164	-3.6%
Mid Murray	8,213	8,035	-2.2%
Murray Bridge	16,576	17,678	6.6%
Southern Mallee	2,200	2,136	-2.9%
The Coorong	5,788	5,671	-2.0%
Total Murraylands Region	35,985	36,690	2.0%
South Australia	1,470,057	1,514,336	3.0%

Source: ABS (2007b)

Overall the population in the Murraylands region increased by 2.0 per cent between 2001 and 2006. This increase is comprised of 6.6 per cent population growth in Murray Bridge and a slight population decline (between approximately 2.0 and 3.5 per cent) in the other component local government areas. The population of South Australia as a whole increased by around 3 per cent between 2001 and 2006 (Table 2.2).

The Murray Bridge Urban Growth Management Plan indicates that the total population in the Rural City of Murray Bridge is expected to increase by between 27 and 45 per cent between 2006 and 2016 (QED 2007).

The Murraylands Growth and Investment Survey 2007 indicates that business owners and managers within the Murraylands region expect the number of new jobs to grow by almost 2,600 over the three years ending at the close of 2008. It is anticipated that the new positions will be concentrated in the retail trade and manufacturing sectors (Clifford, 2007).

2.5 Population Projections

It is possible to derive broad population projections for the Murraylands and SA for the period 2001 to 2016 based on information published by Planning SA. Population projections for the Murraylands region and SA, for the period 1996 to 2016 are detailed in Table 2.4 and illustrated in Figure 2.4.

The projections are based on ABS 2001 Census resident population estimates and trends in mortality, fertility and overseas and interstate migration for the period 1991 to 1996. The method used to compile the projections was not influenced by local factors such as land availability or zoning; it assumes that these factors would not place limitations on population growth (Ian McQueen, Planning SA, pers. comm.).

Table 2.4 Population projections for the Murraylands and SA, 1996 to 2021

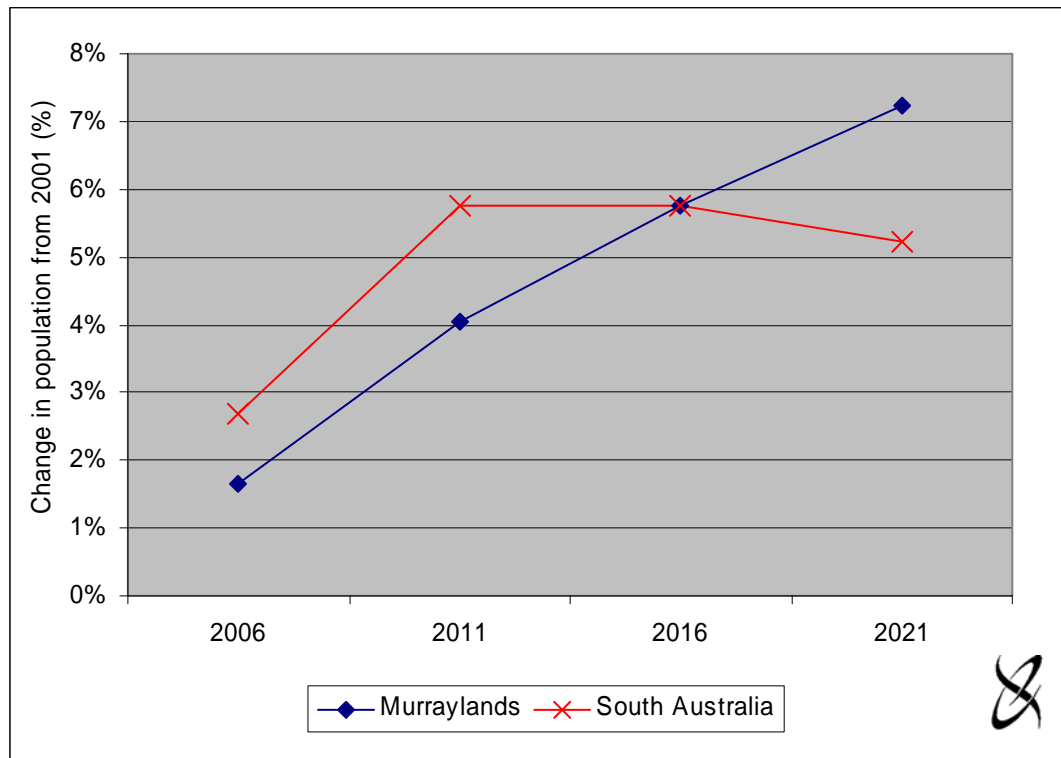
Age	2001	2006	2011		2016		2021		
	Population	Population	Change from 2001	Population	Change from 2001	Population	Change from 2001	Population	Change from 2001
	no.	no.	%	no.	%	no.	%	no.	%
Murraylands									
0-14	7,440	6,952	-6.6%	6,474	-13.0%	6,267	-15.8%	6,336	-14.8%
15-64	22,434	22,773	1.5%	23,090	2.9%	22,697	1.2%	22,200	-1.0%
65+	5,187	5,916	14.1%	6,910	33.2%	8,119	56.5%	9,062	74.7%
Total	35,061	35,641	1.7%	36,474	4.0%	37,083	5.8%	37,598	7.2%
SA									
0-14	291,687	281,183	-3.6%	272,814	-6.5%	270,765	-7.2%	274,432	-5.9%
15-64	999,041	1,034,331	3.5%	1,071,455	7.2%	1,070,583	7.2%	1,062,149	6.3%
65+	990,838	1,027,229	3.7%	1,068,314	7.8%	1,071,599	8.2%	1,064,377	7.4%
Total	2,281,566	2,342,743	2.7%	2,412,583	5.7%	2,412,947	5.8%	2,400,958	5.2%

Source: PIRSA (2008)

Based on the Planning SA projections, the population in the Murraylands region will increase by approximately 7 per cent over the 20 years from 2001 (Census year). Population projections for persons aged 0 to 14 years indicate that there will be a decline (15 per cent decrease from 2001) in this age demographic. The working age population (15 to 64 years) is also projected to decline (by approximately 1 per cent from 2001). The population projections for persons 65 or older indicate that an increase of almost 75 per cent in this age demographic is expected over the 20 years.

Population is projected to increase in the Murray Bridge and Mid Murray local government areas and decrease slightly in the other component council areas.

Figure 2.4 Population projections for the Murraylands and SA, change from 2001



Source: PIRSA (2008)

According to the Planning SA projections, the total population in the Murraylands region is likely to increase by just over 7 per cent by 2021, whereas the total SA population is expected to increase by approximately 5 per cent (Figure 2.4).

3. Labour Force Indicators

This section reports on the major labour force characteristics relevant to the Murraylands and SA. The major labour force statistics include:

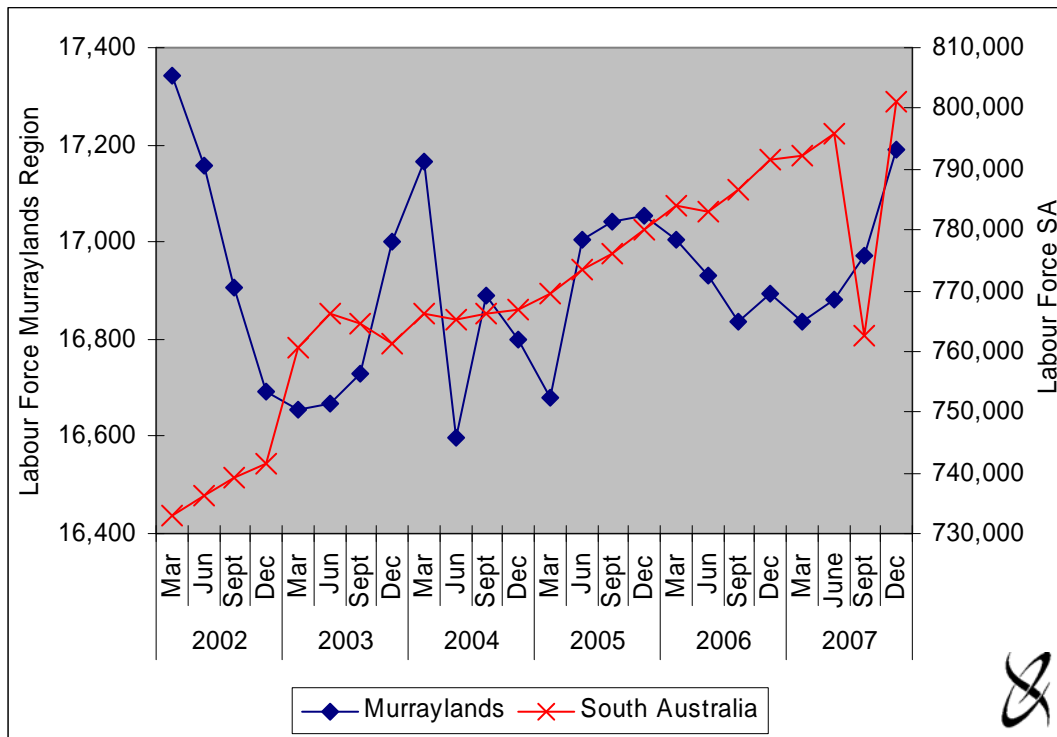
- labour force⁴;
- number of unemployed persons;
- unemployment rate⁵; and
- participation rate⁶.

Note that due to the amalgamation of all or part of several local government areas to form the Mid-Murray Council, it was necessary to make some assumptions regarding the size of the labour force and number of unemployed persons in the area in 2002.

3.1 Labour Force

The total number of persons in the labour force in the Murraylands and SA is illustrated in Figure 3.1 for the period 2002 to 2007.

Figure 3.1 Labour force in the Murraylands and SA, 2002 to 2007



Source: DEWR (2008).

⁴ The labour force is defined as the total number of employed and unemployed persons.

⁵ The unemployment rate is defined as the number of unemployed persons expressed as a percentage of the total labour force.

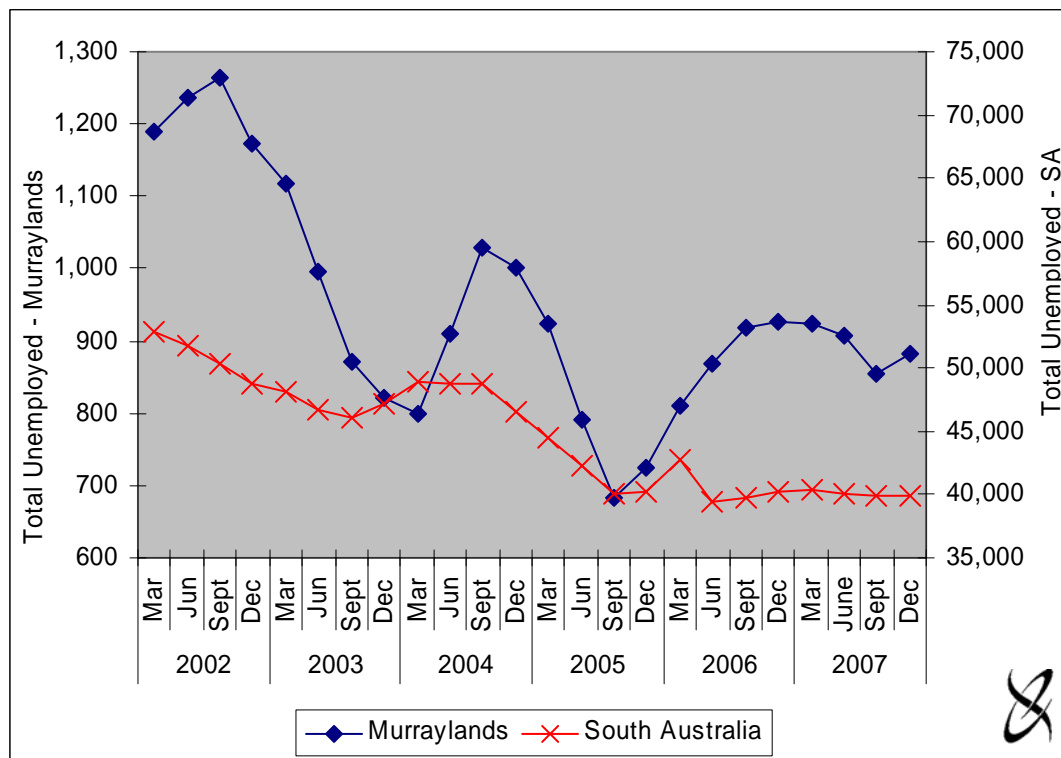
⁶ The participation rate is a measure of the total labour force as a proportion of the working age population (persons aged 15 to 64 years).

The total number of persons in the labour force in the Murraylands, fluctuated over the years 2002 to 2007 ranging between 16,597 in June 2004 and 17,344 in March 2002. Despite some fluctuations, the labour force in SA increased over the five years, from 732,900 in March 2002 to 801,100 in December 2007.

3.2 Unemployment

The number of unemployed persons in the Murraylands and SA are illustrated in Figure 3.2 for the period 2002 to 2007.

Figure 3.2 Unemployed persons in the Murraylands and SA, 2002 to 2007



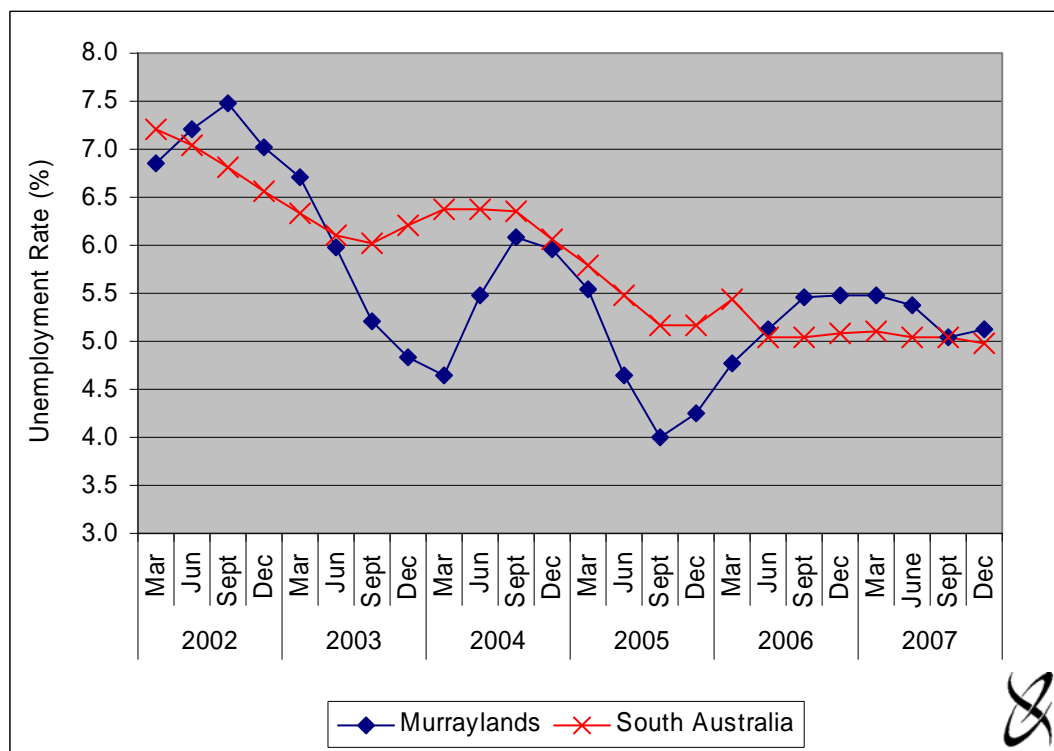
Source: DEWR (2008).

The number of unemployed persons in the Murraylands fluctuated over the period 2002 to 2007, but generally followed a declining trend. The total number of unemployed persons in the region ranged between 1,264 in September 2002 and 683 in September 2005. Comparison of the two end quarters indicate that the total number of unemployed persons decreased by approximately 26 per cent in the Murraylands. The number of unemployed persons in SA decreased by approximately 24 per cent overall, but fluctuated over the years.

3.3 Unemployment Rate

The unemployment rates for the Murraylands and SA are illustrated in Figure 3.3 for the period 2002 to 2007.

Figure 3.3 Unemployment rate in the Murraylands and SA, 2002 to 2007



Source: DEWR (2008) and EconSearch analysis.

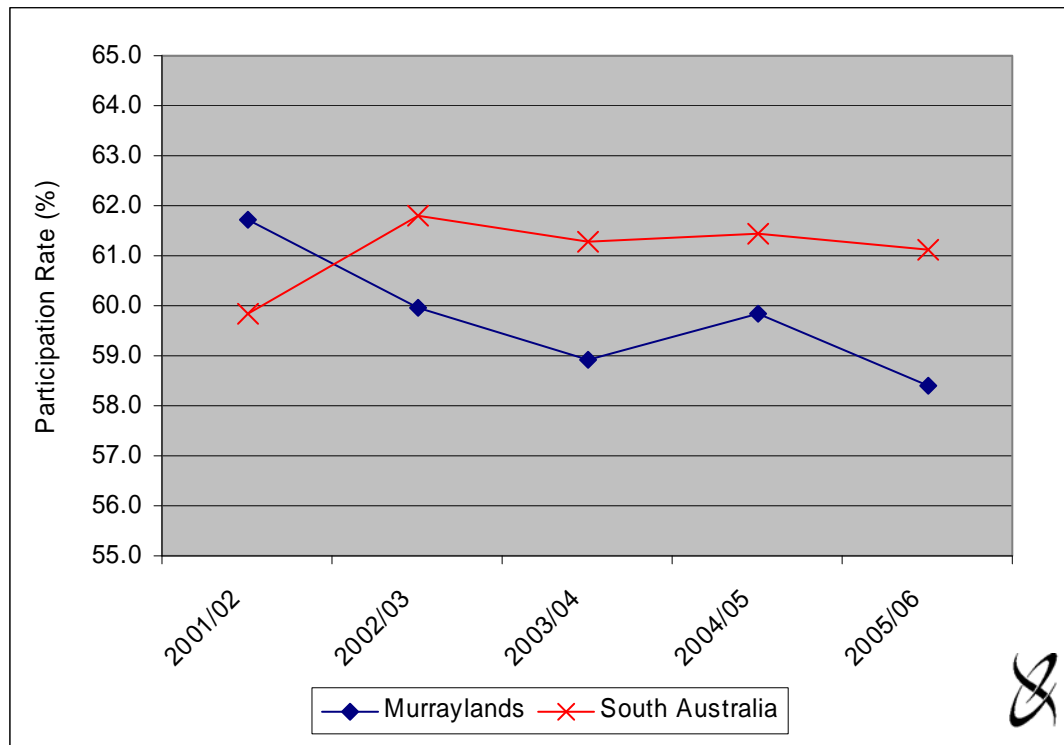
The unemployment rate in the Murraylands fluctuated over the period 2002 to 2007 but generally followed a declining trend. The unemployment rate in the Murraylands region was, on average, slightly lower than the rate for SA, although it has been 0.2 percentage points higher, on average, for the past four quarters.

3.4 Participation Rate

The participation rate for the Murraylands and SA for the period 2001/02 to 2005/06 is illustrated in Figure 3.4.

The labour force participation rate for the Murraylands fluctuated over the 5 years but generally followed a declining trend. The labour force participation rate in SA fluctuated slightly over the four years, ranging between 59 and 62 per cent. In 2005/06 the labour force participation rate in the Murraylands was 58 per cent compared to 61 per cent for SA as a whole.

Figure 3.4 Participation rate in the Murraylands and SA, 2002/03 to 2005/06



Source: DEWR (2008) and EconSearch analysis.

The labour force participation rate was consistently higher for the whole of SA than for the Murraylands region, over the years 2002/03 to 2005/06.

In the Murraylands region the labour force participation rate in 2005/06 was highest in the Southern Mallee local government area where it was 76 per cent. The participation rate was lowest in Murray Bridge local government area where it was 57 per cent.

4. Education and Training

The following education and training statistics are provided for the Murraylands region and SA:

- primary and secondary student enrolments;
- post-secondary qualifications;
- university enrolments; and
- contract of training commencements and completions.

4.1 School Students

Total enrolments for government and non-government schools located within the Murraylands region and SA are detailed in Table 4.1 for the three census years 1996, 2001 and 2006.

The total number of students enrolled in primary school in the Murraylands decreased by 11 per cent between 1996 and 2006. This decrease was comprised of a 28 per cent decrease in enrolments in government schools and a 95 per cent increase in enrolments at non-government schools.

The total number of Murraylands students enrolled in secondary school increased slightly between 1996 and 2006. The increase was comprised of a 7 per cent decrease in government school enrolments and a 220 per cent increase in non-government school enrolments.

Enrolments in non-government schools accounted for 28 per cent of total school enrolments in the Murraylands in 2006. In 2001 the proportion of enrolments in non-government schools was 12 per cent.

Table 4.1 School enrolment in the Murraylands and SA, 1996, 2001 and 2006

	Census Year		
	1996	2001	2006
Murraylands			
Pre-school	448	499	429
Primary			
- Government	3,324	2,974	2,392
- Non-Government	533	812	1,038
Total Primary Student	3,857	3,786	3,430
Secondary Students			
- Government	1,634	1,662	1,524
- Non-Government	147	377	470
Total Secondary Students	1,781	2,039	1,994
South Australia			
Pre-school	17,218	18,256	18,577
Primary			
- Government	112,199	104,183	93,512
- Non-Government	38,615	43,264	46,003
Total Primary Student	150,814	147,447	139,515
Secondary Students			
- Government	55,044	57,938	52,037
- Non-Government	27,665	31,712	35,259
Total Secondary Students	82,709	89,650	87,296

Source: ABS (2007b).

4.2 Qualifications

The level of qualification held by residents in the Murraylands region and SA are detailed in Table 4.2 below, for the years 1996, 2001 and 2006.

The total number of residents in the Murraylands with a non-school qualification increased steadily over the three Census years. Compared with the whole of SA, persons aged 15 years and older in the Murraylands had an above average level of non-school qualification. In 2006, approximately 37 per cent of all persons aged 15 or over in the Murraylands, held some form of non-school qualification. The level of qualification was generally lower for the Murraylands than for SA, with the proportion of persons with a bachelor degree or higher being significantly lower.

Table 4.2 Highest level of qualifications for persons aged 15 and over in the Murraylands and SA, 1996, 2001 and 2006 ^a

Qualification	Murraylands					
	1996		2001		2006	
Postgraduate Degree	21	0%	48	1%	85	1%
Graduate Diploma & Graduate Certificate	129	2%	158	2%	158	1%
Bachelor Degree	608	9%	847	10%	1,055	10%
Advanced Diploma & Diploma	945	13%	841	10%	1,171	11%
Certificate:						
Certificate Level, nfd(b)	n.a.	-	101	1%	422	4%
Certificate III & IV	2,237	32%	3,021	37%	4,035	38%
Certificate I & II	697	10%	444	5%	376	4%
Level of education not described	124	2%	303	4%	361	3%
Level of education not stated	2,461	35%	2,631	32%	3,255	30%
Total	7,069	100%	8,223	100%	10,693	100%
	South Australia					
	1996		2001		2006	
Postgraduate Degree	11,790	3%	15,203	3%	22,897	4%
Graduate Diploma & Graduate Certificate	12,680	3%	14,361	3%	16,098	3%
Bachelor Degree	73,761	17%	95,812	20%	120,979	20%
Advanced Diploma & Diploma	64,328	15%	63,469	13%	79,698	13%
Certificate:						
Certificate Level, nfd(b)	n.a.	-	5,775	1%	21,172	4%
Certificate III & IV	120,797	27%	155,056	32%	176,066	30%
Certificate I & II	35,905	8%	24,298	5%	15,343	3%
Level of education not described	8,447	2%	14,999	3%	15,940	3%
Level of education not stated	112,132	25%	100,201	20%	127,186	21%
Total	439,840	100%	489,174	100%	595,379	100%

Source: ABS (2007b).

4.3 University Enrolments

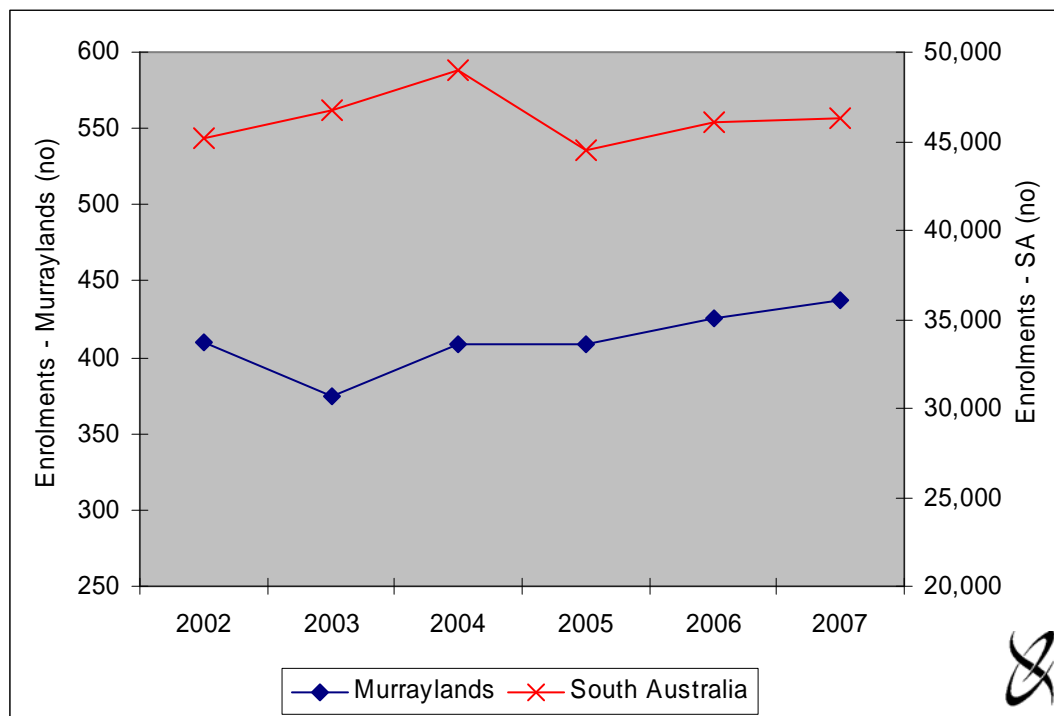
University enrolments by students from the Murraylands region and SA are detailed in Figure 4.1, for the years 2002 to 2007.

Enrolment data are for the three South Australian universities:

- Flinders University;
- The University of Adelaide; and
- University of South Australia.

Enrolments by Murraylands or SA residents at interstate or overseas universities are not included in the data.

Figure 4.1 University enrolments by students from the Murraylands and SA, 2002 to 2007



Source: Flinders University (unpublished data), University of South Australia (unpublished data) and The University of Adelaide (unpublished data).

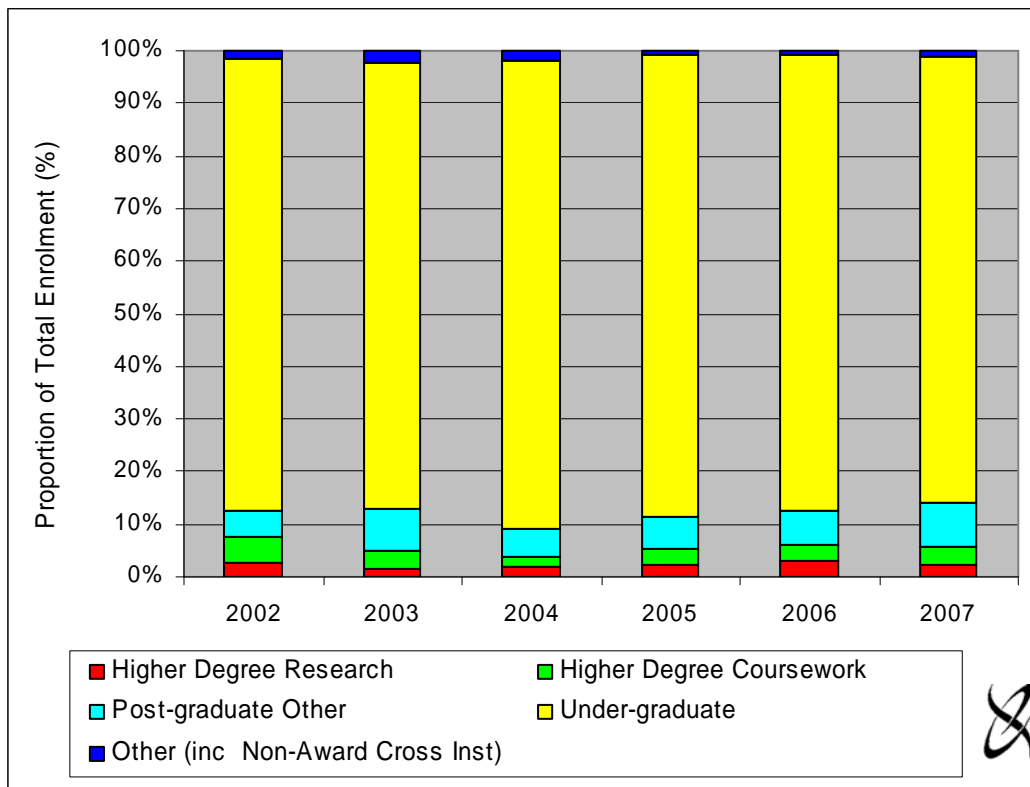
Total university enrolments by students from the Murraylands generally followed an increasing trend over the six years to 2007 despite for a slight decline in 2003. The number of enrolments by students from SA peaked at 48,950 in 2004, but has decreased slightly in subsequent years. The number of students from the Murraylands as a proportion of students from the whole of SA remained relatively stable over the 6 year period, at almost 1 per cent.

Note that the data are based on the holiday address postcodes of each student. This means that a student originally from the Murraylands who stays in Adelaide over the holiday period would not be included in the Murraylands count. Consequently, the data are likely to understate the true number of enrolments from the Murraylands but, over time, the data should provide a reasonable trend.

University student enrolments for the Murraylands region and SA, are detailed in Figures 4.2 and 4.3, for the years 2002 to 2007. Enrolments are broken down into the following categories to highlight the level of study undertaken:

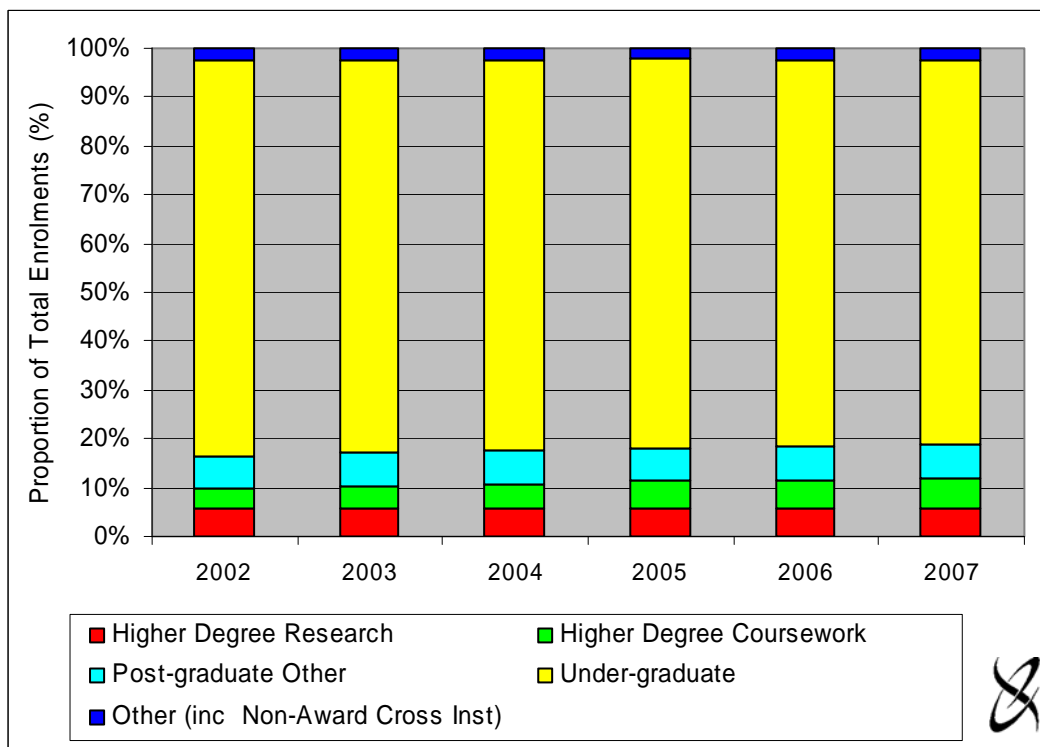
- higher degree research;
- higher degree coursework;
- other postgraduate;
- undergraduate; and
- other (including non-award and cross-institutional study).

Figure 4.2 University enrolments by level of study, Murraylands, 2002 to 2007



Source: Flinders University (unpublished data), University of South Australia (unpublished data) and The University of Adelaide (unpublished data).

Figure 4.3 University enrolments by level of study, SA, 2002 to 2007



Source: Flinders University (unpublished data), University of South Australia (unpublished data) and The University of Adelaide (unpublished data).

The breakdown of enrolments by program level over the six year period highlights some differences between the Murraylands region and SA as a whole. The differences in enrolment level are outlined below:

- higher degree research – 2.3 per cent of total enrolments in the Murraylands region, 5.7 per cent in SA;
- higher degree coursework – 3.2 per cent of total enrolments in the Murraylands region, 5.2 per cent in SA;
- other postgraduate – 6.7 per cent of total enrolments in the Murraylands region, 6.7 per cent in SA;
- undergraduate – 86.4 per cent of total enrolments in the Murraylands region, 80.0 per cent in SA; and
- other – 1.4 per cent of total enrolments in the Murraylands region, 2.4 per cent in SA.

Enrolments at universities, technical colleges and other education institutes for three census years (1996, 2001 and 2006) are summarised in Table 4.3 for the Murraylands region and South Australia.

Table 4.3 Higher education enrolments for the Murraylands and South Australia, 1996, 2001 and 2006

	Murraylands			South Australia		
	1996	2001	2006	1996	2001	2006
TAFE						
Full-time students	90	117	121	8,743	10,763	9,581
Part-time students	452	523	464	25,333	26,151	22,725
Not Stated	6	3	8	255	230	441
Total	548	643	593	34,331	37,144	32,747
University						
Full-time students	78	80	141	29,712	31,529	37,104
Part-time students	102	134	123	17,283	17,657	16,309
Not Stated	0	3	4	158	166	313
Total	180	217	268	47,153	49,352	53,726
Other						
Full-time students	28	54	31	2,282	2,726	2,654
Part-time students	59	95	108	4,455	7,853	6,842
Not Stated	6	3	0	109	189	245
Total	93	152	139	6,846	10,768	9,741
Institute type and/or status not stated	1,416	1,617	2,754	63,526	54,698	105,797
Total	2,237	2,629	3,754	151,856	151,962	202,011

^a 'Other education institution' includes residents who did not state the type of educational institution.

Source: ABS (2007b).

Between 1996 and 2006 the total number of Murraylands residents enrolled in a higher education institute increased by 68 per cent. This is significantly greater than for SA as a whole, with the total number of residents undertaking higher education increasing by 33 per cent.⁷

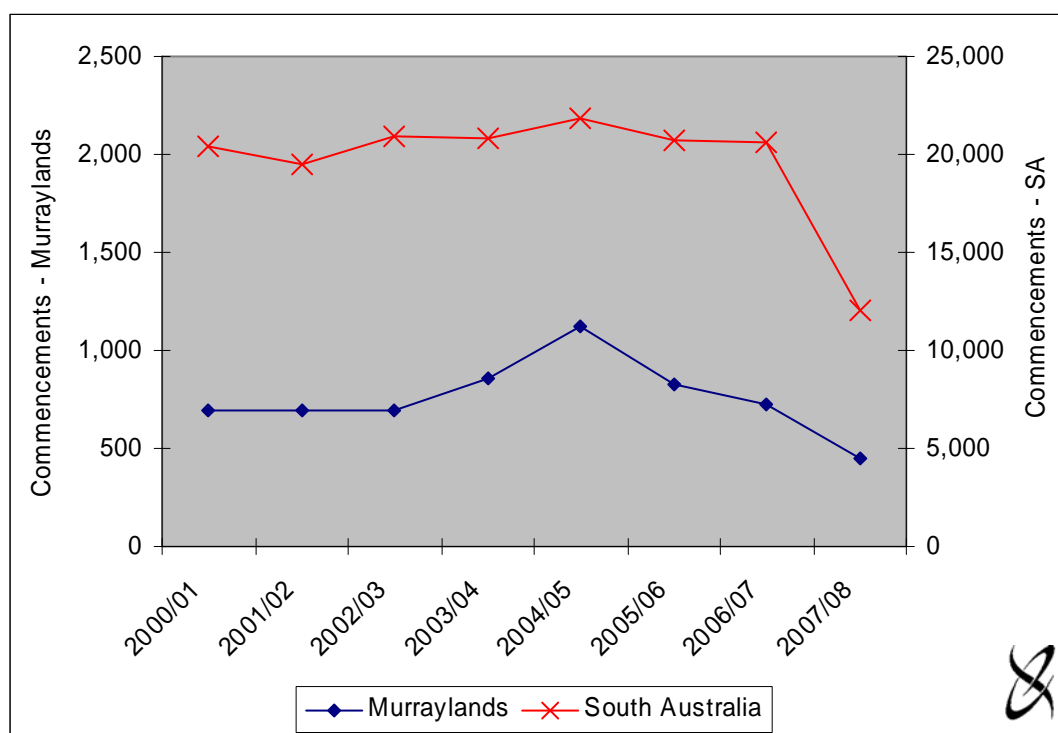
Between 2001 and 2006 in both the Murraylands and SA there was a significant increase in the total number of higher education enrolments. This is primarily due to a significant increase in the number of respondents who did not state institute type and/or status.

4.4 Contracts of Training

The number of contracts of training commencements and completion in the Murraylands and SA are detailed in Figures 4.4 and 4.5, for the years 2000/01 to 2007/08. These data were derived from a live database. The numbers reported in Figures 4.4 and 4.5 were extracted from the database in March 2008.

The number of contract of training commencements in the Murraylands fluctuated slightly over the 8 year period to 2007/08. As a proportion of total SA commencements, the Murraylands contracts of training commencements ranged between 3.3 per cent and 5.2 per cent over the 8 year period.

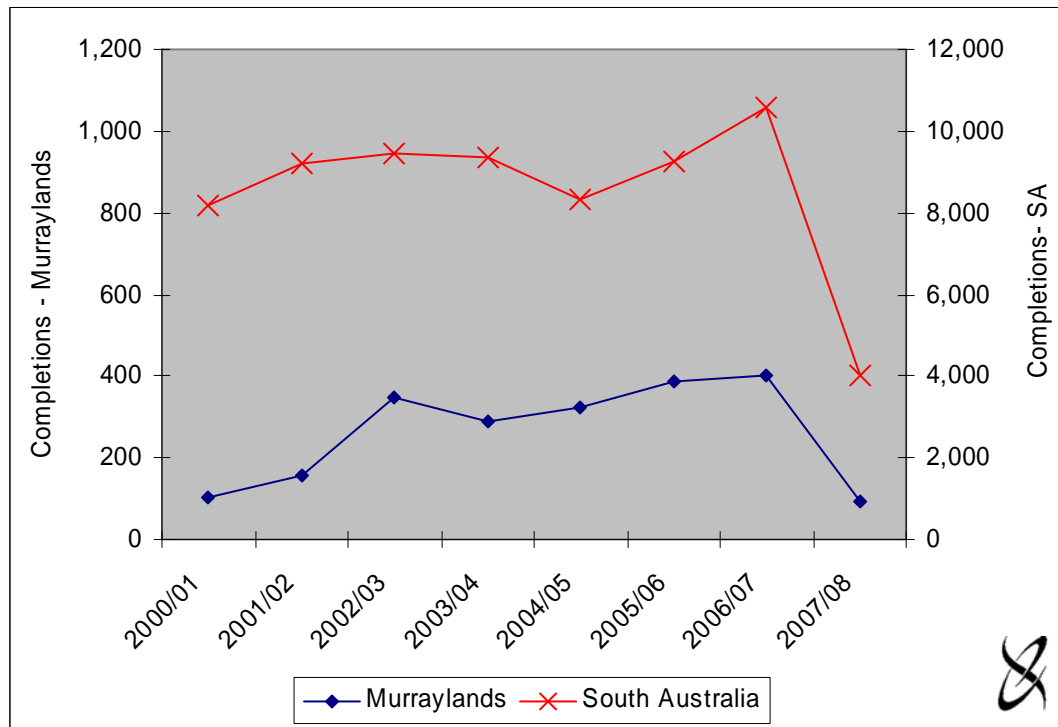
Figure 4.4 Contract of training commencements in the Murraylands and SA, 2000/01 to 2007/08



Source: DFEEST (unpublished data)

⁷ In 2006 in both the Murraylands and SA as a whole, there was a significant increase in the number of respondents who did not state institute type and/or status.

Figure 4.5 Contract of training completions in the Murraylands and SA, 2000/01 to 2007/08



Source: DFEEST (unpublished data).

The total number of contract of training completions in the Murraylands fluctuated over the 8 year period, but generally followed an increasing trend. Completions in the Murraylands region as a proportion of total SA completions also fluctuated, increasing from 1.3 per cent in 2000/01 to 4.2 per cent in 2004/05 and decreasing slightly in subsequent years.

The data suggests that there was a decline in the number of contract of training commencements and completions in both the Murraylands and SA between 2005/06 and 2006/07. Due to the nature of the data source and the method by which data are collected, this decline is more likely to reflect incomplete information rather than an actual decrease in training.

5. Income

This section provides information on average annual income and income source relevant to the Murraylands and SA.

5.1 Annual Taxable Income

The proportion of taxable individuals and the mean taxable income are presented in Table 5.1 for the Murraylands and SA.

The proportion of taxable individuals (compared to non-taxable individuals) in the Murraylands fluctuated slightly over the eight years, ranging from 75 per cent to 79 per cent. In the 2005/06, there were 17,265 taxable and 5,575 non-taxable⁸ individuals in the Murraylands. The proportion of taxable individuals was 75 per cent. Despite a slight decrease over the eight year period (from 84 per cent to 82 per cent), the proportion of taxable individuals in SA as a whole was greater than the Murraylands in all years.

The mean individual taxable incomes in the Murraylands and SA for the period 1997/98 to 2005/06 are illustrated below in Figures 5.1 (nominal terms) and 5.2 (real terms).

Taxable income is the amount remaining after deducting from assessable income all allowable deductions under the *Income Tax Assessment Act 1936*. Taxable income is the amount to which tax rates are applied. Average taxable income in an area is the taxable income per person (calculated by dividing the total taxable income for the region by the total number of taxable individuals).

The mean individual taxable income in the Murraylands was consistently lower than the state average, over the period 1997/98 to 2005/06, in both nominal and real terms. In the Murraylands the mean individual taxable income increased in nominal terms, from approximately \$26,000 in 1997/98 to almost \$36,000 in 2005/06. For SA the mean individual taxable income increased steadily over the eight year period from just over \$30,000 in 1997/98 to almost \$43,000 in 2005/06 (Table 5.1 and Figure 5.1).

⁸ An individual is considered non-taxable when the net tax payable by the individual is equal to zero.

Table 5.1 Taxable individuals and taxable income in the Murraylands and SA, 1997/98 to 2005/06

	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Murraylands									
Proportion of taxable individuals (%) ^a	79%	77%	78%	76%	77%	76%	76%	75%	76%
Mean taxable income - nominal (\$) ^b	25,962	27,481	28,128	29,775	32,425	32,720	33,833	34,723	35,668
Mean taxable income - real (\$) ^c	25,962	27,124	27,081	27,121	28,738	27,573	27,686	27,815	27,521
South Australia									
Proportion of taxable individuals (%) ^a	84%	82%	83%	81%	81%	81%	81%	81%	82%
Mean taxable income - nominal (\$) ^b	30,474	31,961	32,865	35,256	36,406	37,857	39,644	41,513	42,778
Mean taxable income - real (\$) ^c	30,474	31,546	31,642	32,114	32,266	31,902	32,441	33,254	33,007

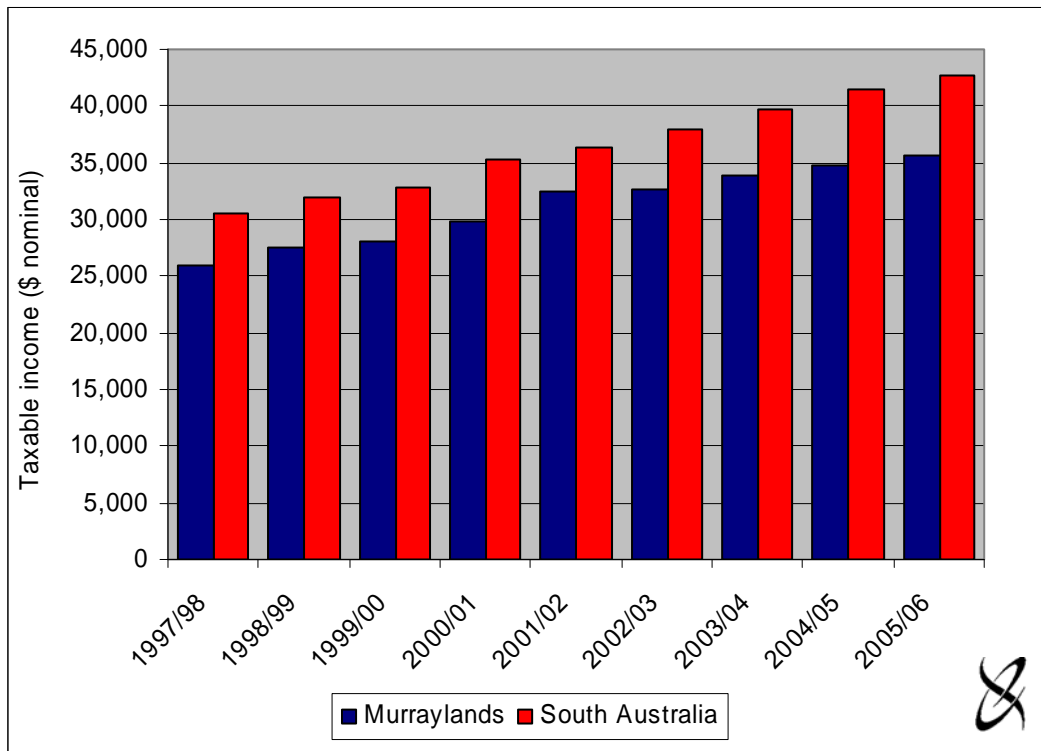
^a Refers to personal taxpayers who submitted a return with net tax payable of more than \$0.

^b Mean (average) taxable income refers only to taxable individuals and is calculated by dividing net taxable income of the region as a whole by the number of taxable individuals.

^c The real mean individual taxable income is the nominal income adjusted by the purchasing power of money. The consumer price index (CPI) has been used to make this adjustment (ABS 2008b). It enables meaningful comparisons of incomes to be made between years.

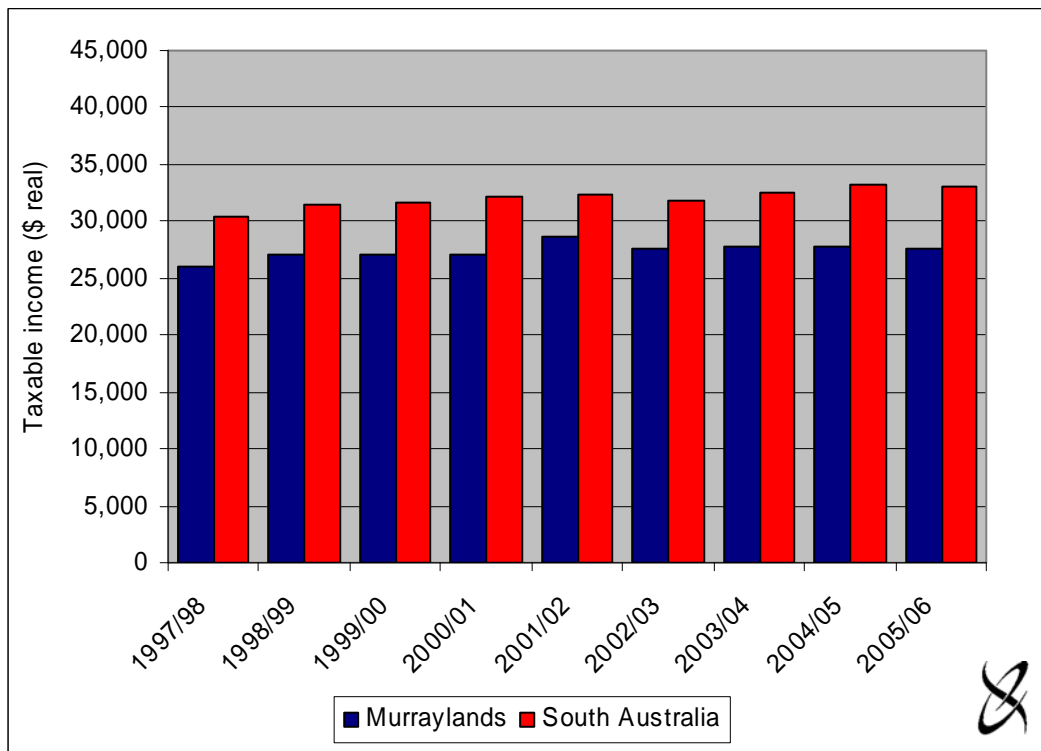
Source: ATO (2008) and ABS (2008b).

Figure 5.1 Nominal mean individual taxable income in the Murraylands and SA, 1997/98 to 2005/06



Source: ATO (2008).

Figure 5.2 Real mean individual taxable income in the Murraylands and SA, 1997/98 to 2005/06 ^a



^a In 1997/98 dollars.

Source: ATO (2008) and ABS (2008b).

5.2 Income Source

Total income, salaries and wages, Commonwealth benefits and payments and gross tax are detailed in Table 5.2 for the Murraylands and SA for the period 1997/98 to 2005/06. The proportion of total income sourced from Commonwealth benefits and payments, salaries and wages, other income sources and paid in gross tax is illustrated in Figures 5.3 to 5.6 respectively.

Salary and wages comprise salary, wages and other labour costs actually paid or payable to persons employed. Commonwealth benefits and payments include payments such as social security, unemployment, sickness or special benefits, formal training allowances, AuStudy, AbStudy, New Start Allowance, Youth Allowance, Age Pension and Disability Support Pension. Other income includes income earned from Commonwealth benefits and payments and sources other than salaries and wages. Other income sources (i.e. excluding wages and salaries and Commonwealth benefits and payments) could include investment related income such as interest, rent or dividends.

In the Murraylands, the proportion of total income sourced from Commonwealth benefits and payments generally followed a declining trend over the period 1997/98 to 2005/06. The proportion of total income sourced from Commonwealth benefits and payments in the Murraylands was generally higher than for SA as a whole over the eight years. In 1997/98, Commonwealth benefits and payments accounted for 1.03 per cent of total income in the Murraylands region and 1.19 per cent in SA as a whole. By 2005/06, the proportion of benefits and payments was 0.85 per cent in the Murraylands region and 0.76 per cent in SA (Table 5.2 and Figure 5.3).

The proportion of total income sourced from salaries and wages in the Murraylands remained relatively stable, ranging between 49 and 54 per cent. The proportion of salaries and wages remained relatively stable in SA, averaging around 77 per cent over the eight years (Table 5.2 and Figure 5.4).

The proportion of total taxable income attributable to other income sources fluctuated slightly over the period 1997/98 to 2005/06 in the Murraylands, ranging between 46 and 50 per cent. For SA the proportion of total income attributable to other income sources remained relatively stable over the eight years at around 22 to 23 per cent (Table 5.2 and Figure 5.5).

In the Murraylands, tax as a proportion of total income varied slightly over the eight years averaging around 15 per cent. For SA, the proportion of tax also remained relatively stable averaging around 23 per cent over the eight years (Table 5.2 and Figure 5.6).

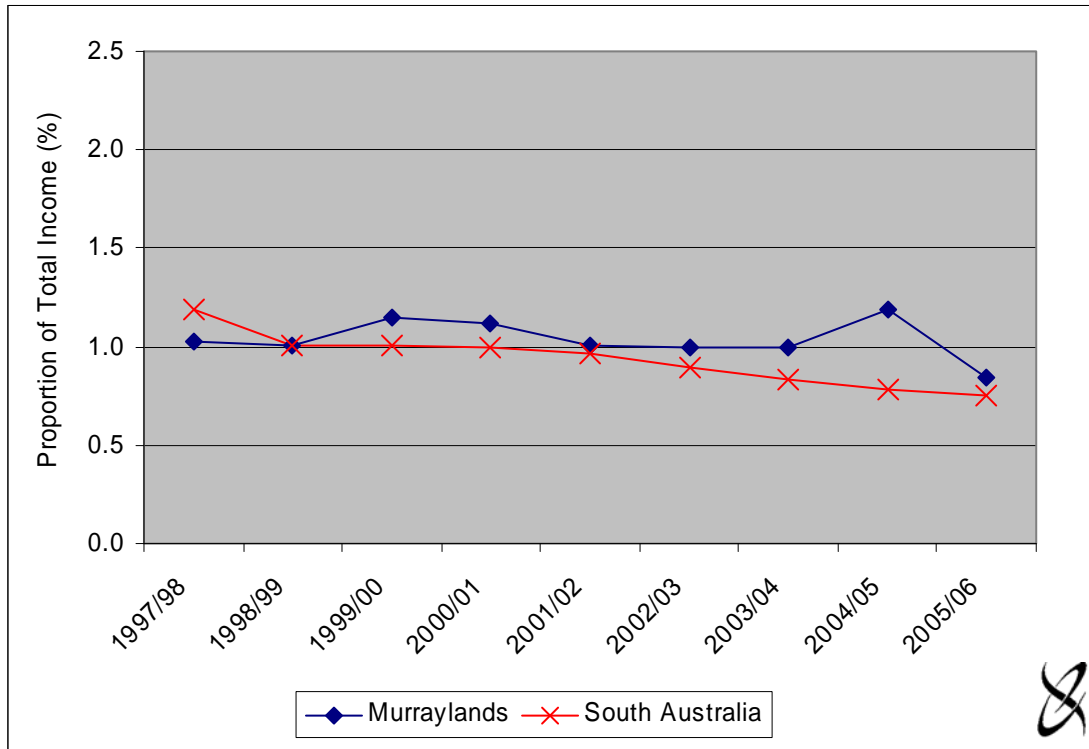
Table 5.2 Total income and some of its components for the Murraylands and SA, 1997/98 to 2005/06

Year	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Murraylands									
Salaries and Wages (\$'000)	302,750	324,475	253,362	343,761	360,370	378,329	401,733	428,744	458,727
Commonwealth Benefit and Payments (\$'000)	6,216	6,243	5,607	7,527	7,455	7,503	7,688	9,600	7,213
Other Income (\$'000)	293,901	291,163	230,291	322,541	373,484	364,675	363,113	369,544	384,997
Total Income (\$'000)	602,867	621,881	489,261	673,829	741,309	750,507	772,535	807,889	850,937
Gross Tax (\$'000)	92,335	97,579	76,570	96,066	113,442	114,603	117,928	107,727	124,543
South Australia									
Salaries and Wages (\$'000)	15,190,573	16,421,754	16,618,824	17,455,865	18,219,691	19,357,598	20,654,259	21,978,982	23,269,024
Commonwealth Benefit and Payments (\$'000)	237,094	202,755	215,840	223,444	228,790	225,171	224,479	225,562	229,632
Other Income (\$'000)	4,475,898	3,532,267	4,642,005	4,850,295	5,179,735	5,674,652	6,045,757	6,565,932	6,871,486
Total Income (\$'000)	19,903,565	20,156,776	21,476,669	22,529,603	23,628,215	25,257,421	26,924,496	28,770,477	30,370,143
Gross Tax (\$'000)	4,698,261	4,858,282	5,301,943	5,007,441	5,334,679	5,837,576	6,220,474	6,716,122	6,894,766

^a 'Other income' includes income of taxable individuals other than income received from 'Salaries and Wages' and 'Commonwealth Benefits and Payments'. This could include investment income such as rent, dividends and interest.

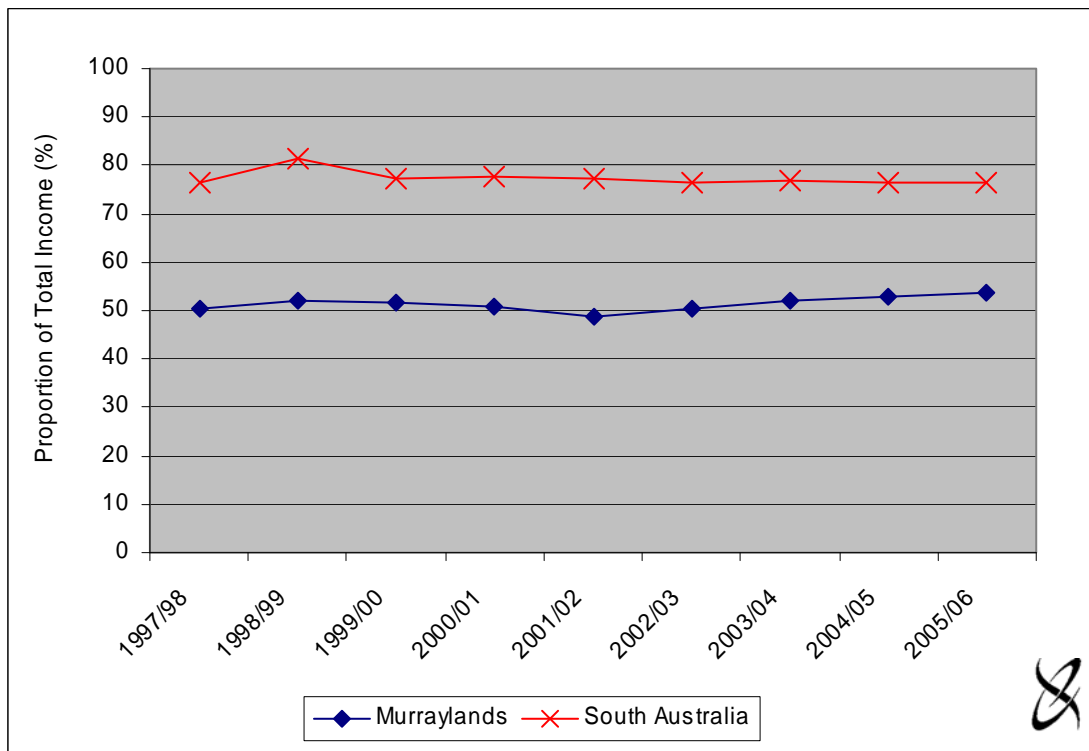
Source: ATO (2008).

Figure 5.3 Commonwealth benefits and payments in the Murraylands and SA, 1997/98 to 2005/06



Source: ATO (2008).

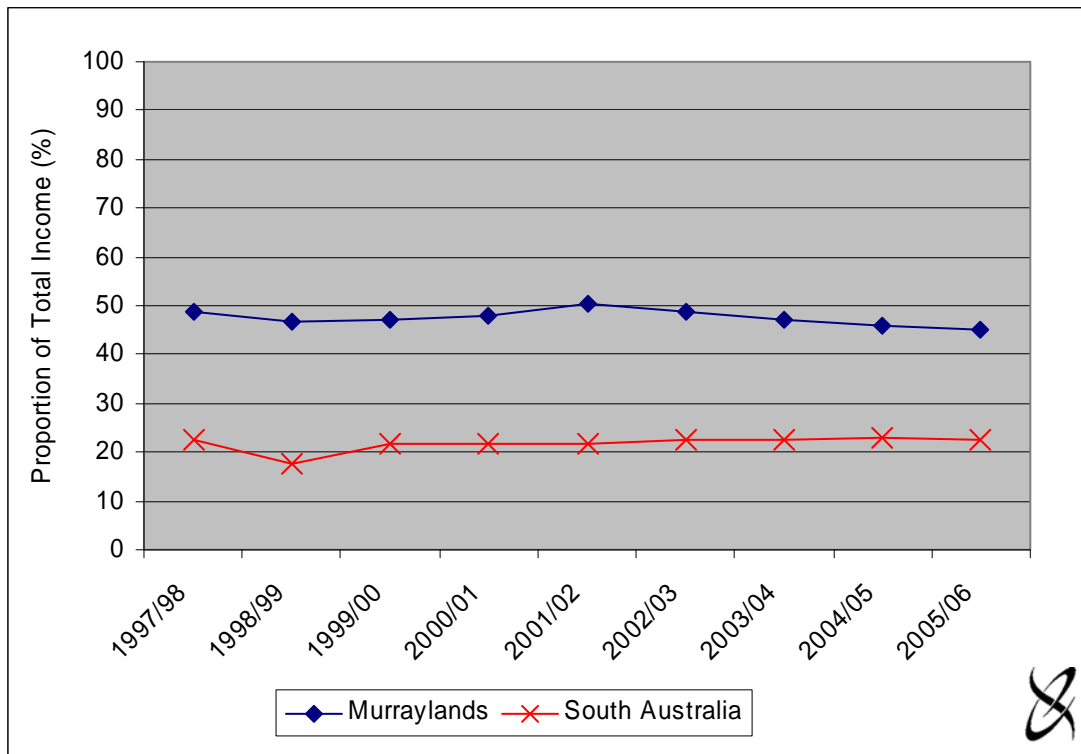
Figure 5.4 Salaries and wages in the Murraylands and SA, 1997/98 to 2005/06



Source: ATO (2008).

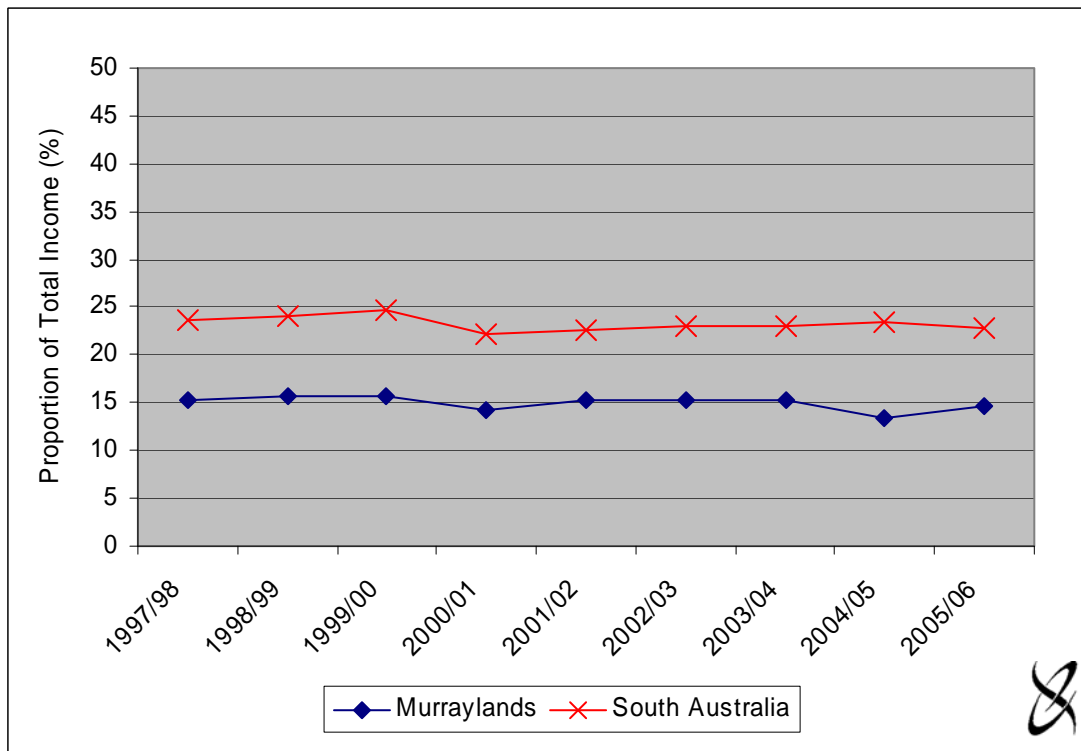


Figure 5.5 Other income in the Murraylands and SA, 1997/98 to 2005/06



Source: ATO (2008).

Figure 5.6 Gross tax in the Murraylands and SA, 1997/98 to 2005/06



Source: ATO (2008).

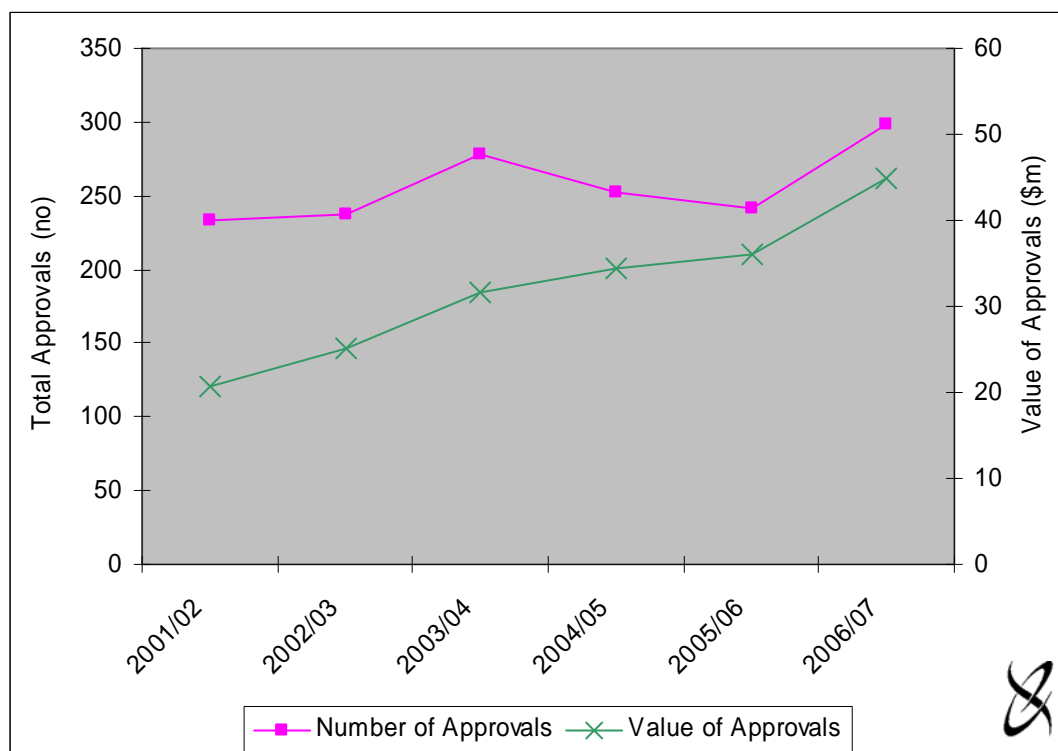


6. Building Approvals

This section provides the number and value of approvals for new residential dwellings in the Murraylands and SA.

The number and total value of approvals in the Murraylands region and SA are illustrated in Figures 6.1 and 6.2 respectively, for the period 2001/02 to 2006/07.

Figure 6.1 Number and value of new residential dwelling approvals in the Murraylands, 2001/02 to 2006/07



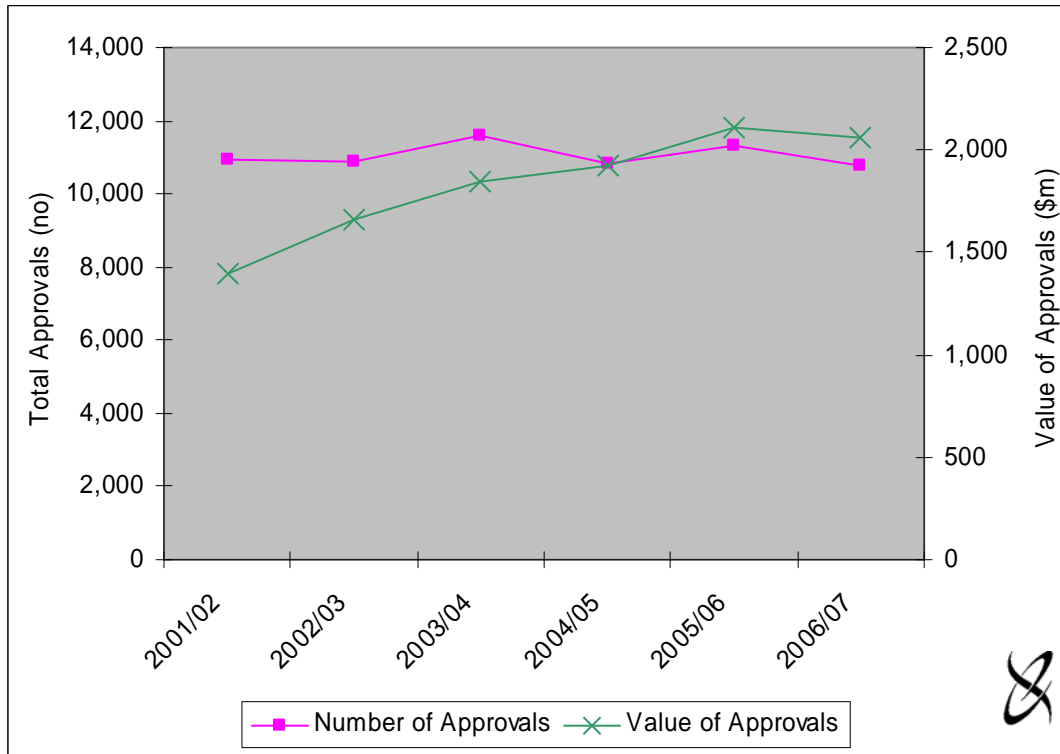
Source: ABS (2008c).

The total number of building approvals in the Murraylands increased from 233 in 2001/02 to 298 in 2006/07, an increase of 28 per cent. The total value of approvals increased, from almost \$21 million in 2001/02 to nearly \$45 million in 2006/07, an increase of 116 per cent (Figure 6.1).

Comparison of the two end years (2001/02 and 2006/07) highlights the significant increase in the value of building approvals in SA. The total number of approvals was 1 per cent less in 2006/07 than in 2001/02, while the total value was 48 per cent higher (Figure 6.2).

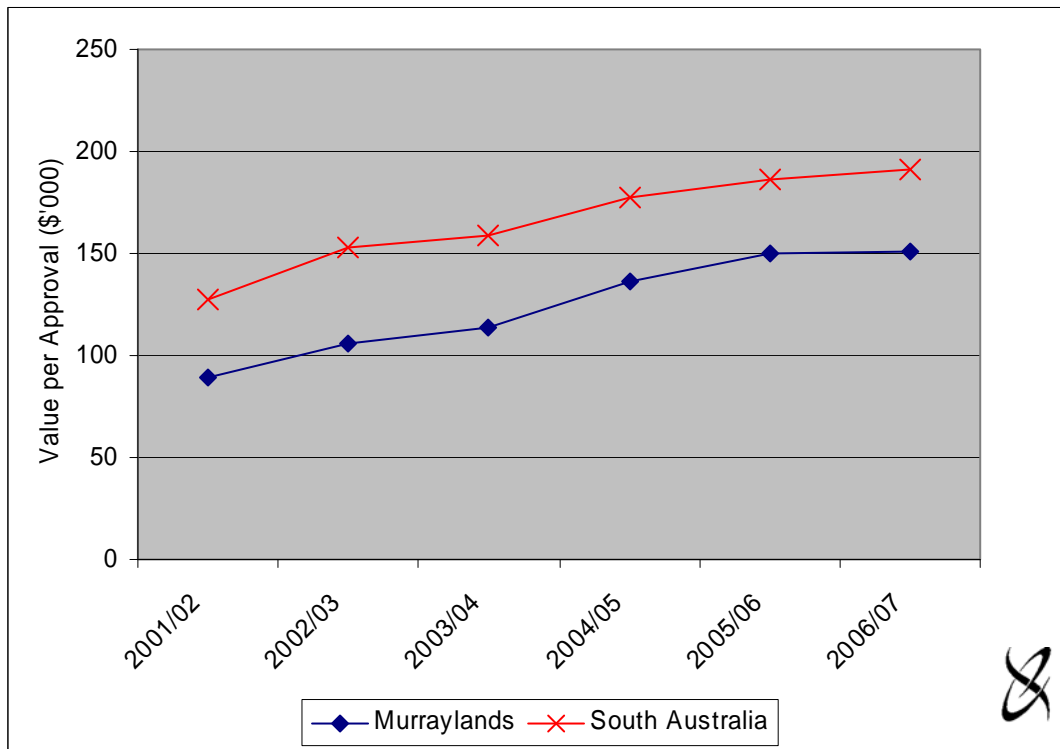
The average value per approval in the Murraylands and SA for the period 2001/02 to 2006/07, is illustrated in Figure 6.3. The average value per approval in the Murraylands increased by approximately 68 per cent, from \$89,000 in 2001/02 to \$150,000 in 2005/06. For SA, the value per approval increased from \$128,000 in 2001/02 to \$186,000 in 2005/06, an increase of 46 per cent.

Figure 6.2 Number and value of new residential dwelling approvals in SA, 2001/02 to 2006/07



Source: ABS (2008c).

Figure 6.3 Average value per approval in the Murraylands and SA, 2001/02 to 2006/07



Source: ABS (2008c).



7. Motor Vehicles

7.1 New Motor Vehicle Sales

The number of new motor vehicle sales in the Murraylands and SA for the years 2001/02 to 2003/04 is detailed in Table 7.1 below.

Table 7.1 New motor vehicle sales in the Murraylands and SA, 2001/02 to 2003/04

Year	Sales (no.)		Regional sales as a proportion of SA total
	Murraylands	South Australia	
2001/02	949	50,776	1.87%
2002/03	993	56,634	1.75%
2003/04	1,140	63,256	1.80%

Source: ABS (2004).

The number of new motor vehicle sales in the Murraylands increased by 20 per cent between 2001/02 and 2003/04. For SA as a whole, the number of new motor vehicle sales increased by almost 25 per cent. Sales in the Murraylands as a proportion of the state total averaged around 1.8 per cent over the three years.

7.2 Motor Vehicle Registrations

The total number of registered motor vehicles in the Murraylands and SA for the years 2002/03 to 2006/07 is detailed in Table 7.2 below.

The total number of registered vehicles in the Murraylands increased by almost 3 per cent in the four years since 2002/03, while registrations state wide increased by 7 per cent.

Table 7.2 Motor vehicle registrations in the Murraylands and SA, 2002/03 to 2006/07

Vehicle Type	Number of Registrations									
	Murraylands					South Australia				
	2002/03	2003/04	2004/05	2005/06	2006/07	2002/03	2003/04	2004/05	2005/06	2006/07
Campervans	136	133	128	138	141	4,393	4,306	4,176	4,076	4,164
Light rigid trucks	83	81	85	94	95	4,155	4,382	4,605	4,971	5,011
Heavy rigid trucks	937	898	885	861	842	21,467	21,557	21,559	21,916	21,938
Buses	102	101	114	112	109	4,285	4,174	4,233	4,413	4,544
Motorcycles	763	782	762	844	822	28,454	29,382	30,676	33,772	36,898
Passenger vehicles	12,660	12,847	12,883	13,045	13,050	873,449	886,931	897,332	915,059	927,313
Light commercial vehicles	4,613	4,718	4,761	4,760	4,779	132,754	137,252	141,041	145,643	148,920
Articulated trucks	228	241	246	244	221	6,436	6,224	6,344	6,389	6,446
Non freight carrying trucks	20	20	21	20	22	1,761	1,715	1,746	1,718	1,727
Total	19,542	19,821	19,885	20,118	20,081	1,077,154	1,095,923	1,111,712	1,137,957	1,156,961

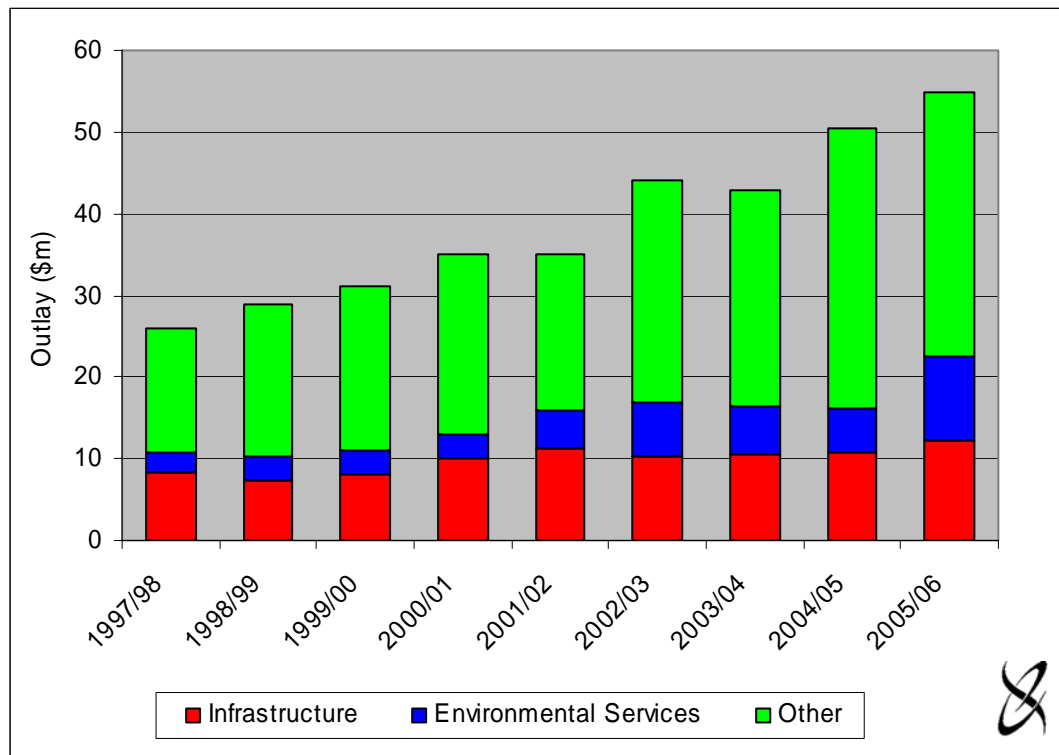
Source: ABS (2007d)

8. Local Government Finance

Outlay by local government in the Murraylands and SA is detailed in Figures 8.1 and 8.2 respectively, for the period 1997/98 to 2005/06. Total local government outlay has been divided into three categories:

- infrastructure;
- environmental services; and
- other outlay.

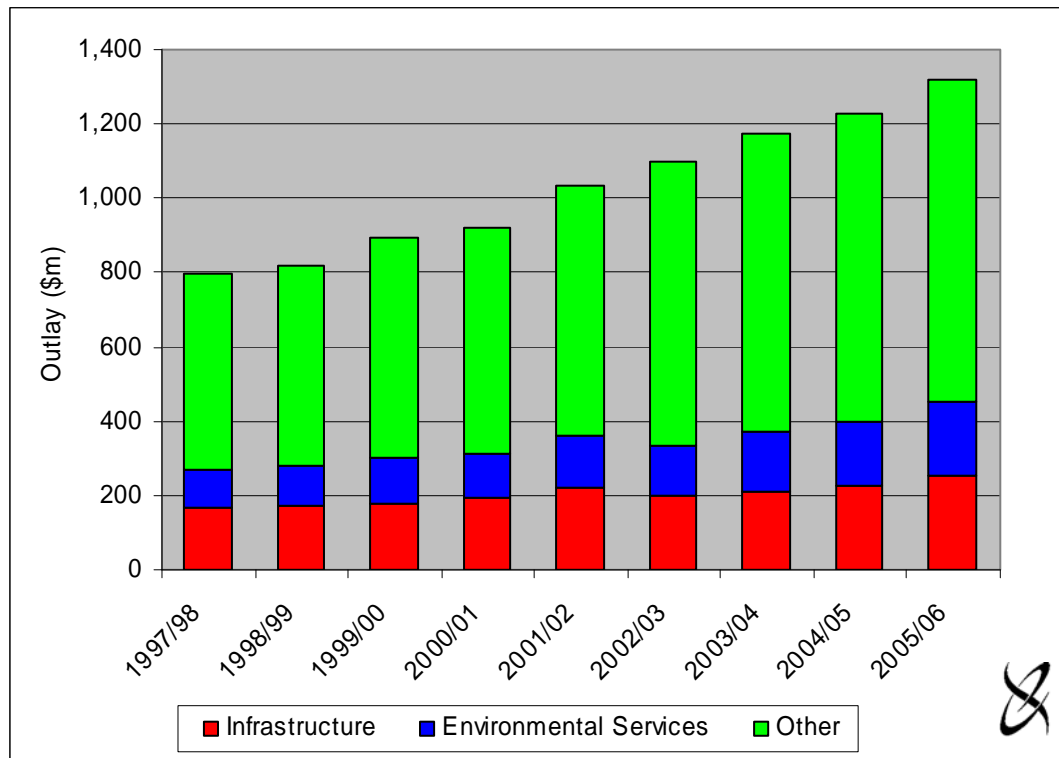
Figure 8.1 Local government outlay in the Murraylands, 1997/98 to 2005/06



Source: South Australian Local Government Grants Commission (by request).

Despite a slight decrease in 2003/04, total local government outlay in the Murraylands followed an increasing trend over the nine years, 1997/98 to 2005/06. Total outlay increased by approximately 111 per cent from \$25.9 million in 1997/98 to \$54.8 million in 2005/06. Outlay on infrastructure generally increased over the period, ranging between \$7.3 million in 1998/99 and \$12.3 million in 2005/06. Outlay on environmental services fluctuated over the nine years, ranging between \$2.4 million in 1997/98 and \$10.3 million in 2005/06. Total other outlay increased by 112 per cent from \$15.2 million in 1997/98 to \$32.2 million in 2005/06 (Figure 8.1).

Figure 8.2 Local government outlay in SA, 1997/98 to 2005/06



Source: South Australian Local Government Grants Commission (by request).

Over the nine years, on average, expenditure on infrastructure accounted for approximately 26 per cent of total local government outlay in the Murraylands and 20 per cent in SA. Outlay on environmental services accounted for 12 per cent of total outlay in the Murraylands and 13 per cent in SA.

9. Business Registrations

Single location business registrations in the Murraylands region and for SA are detailed in Table 9.1 below.

Table 9.1 Single location business registrations in the Murraylands and SA, 2001

Industry	2001			
	Murraylands Region		South Australia	
	(no.)	% of total	(no.)	% of total
Agriculture, Forestry & Fishing	2,123	51.8%	23,195	15.3%
Mining	n.a.	-	488	0.3%
Manufacturing	142	3.5%	8,661	5.7%
Electricity, Gas & Water Supply	n.a.	-	121	0.1%
Construction	365	8.9%	18,946	12.5%
Wholesale Trade	94	2.3%	5,316	3.5%
Retail Trade	406	9.9%	16,508	10.9%
Accommodation, Cafes & Restaurants	84	2.1%	3,627	2.4%
Transport & Storage	149	3.6%	8,316	5.5%
Communication Services	22	0.5%	2,143	1.4%
Finance & Insurance	75	1.8%	14,552	9.6%
Property & Business Services	368	9.0%	28,668	19.0%
Government Admin & Defence	12	0.3%	393	0.3%
Education	20	0.5%	2,247	1.5%
Health & Community Services	87	2.1%	6,828	4.5%
Cultural & Recreational Services	70	1.7%	3,977	2.6%
Personal & Other Services	73	1.8%	6,973	4.6%
Industry Not Stated	5	0.1%	235	0.2%
Total	4,544	100.0%	151,194	100.0%

Source: ABS (2002).

According to the Australian Business Register, there were 4,544 single location business registrations within the Murraylands in 2001. The majority of these businesses were in the agriculture, forestry and fishing (51.8 per cent), retail trade (9.9 per cent), property and business services (9.0 per cent) and construction (8.9 per cent) industries (Table 9.1). Together, these four industries made up more than three-quarters of all single location business registrations in the region.

The breakdown of business registrations by industry highlights some differences between the Murraylands and SA (Table 9.1). The most significant differences occurred in the following sectors:

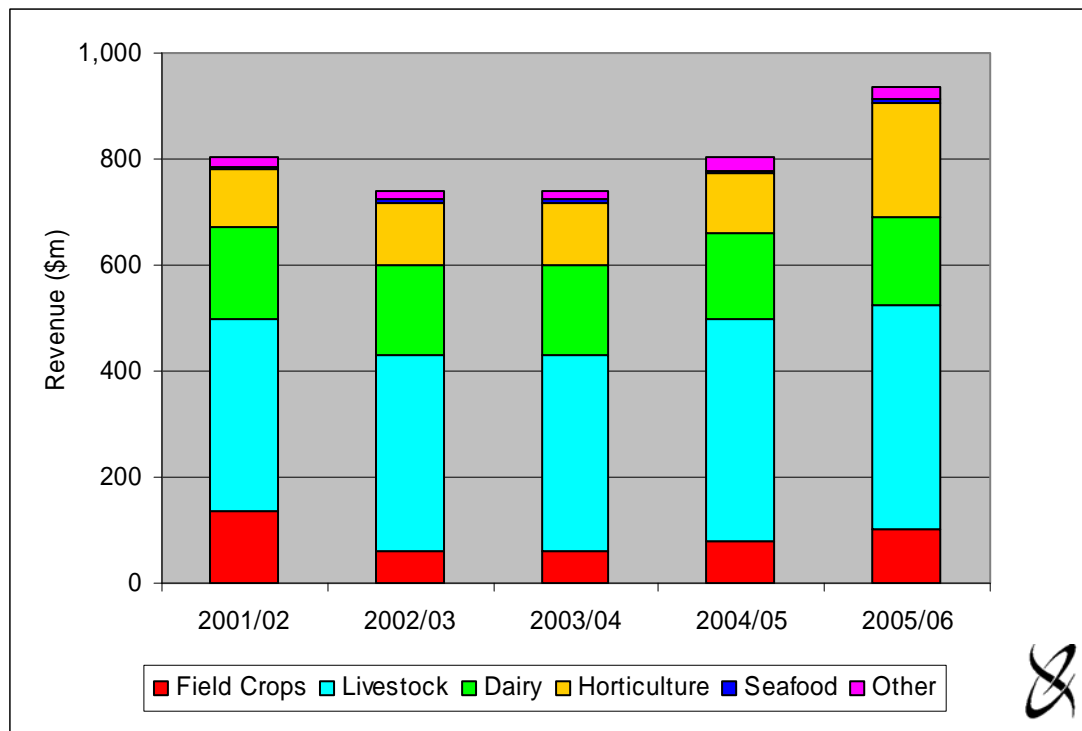
- agriculture, forestry and fishing – 51.8 per cent in the Murraylands and 15.3 per cent in SA;
- property and business services – 9.0 per cent in the Murraylands and 19.0 per cent in SA; and
- finance and insurance – 1.8 per cent in the Murraylands and 9.6 per cent in SA.



10. Value of Food Production

The breakdown of the total value of food production is illustrated in Figures 10.1 and 10.2 for the Murraylands and SA respectively.

Figure 10.1 Estimated gross value of food production in the Murraylands, 2001/02 to 2005/06

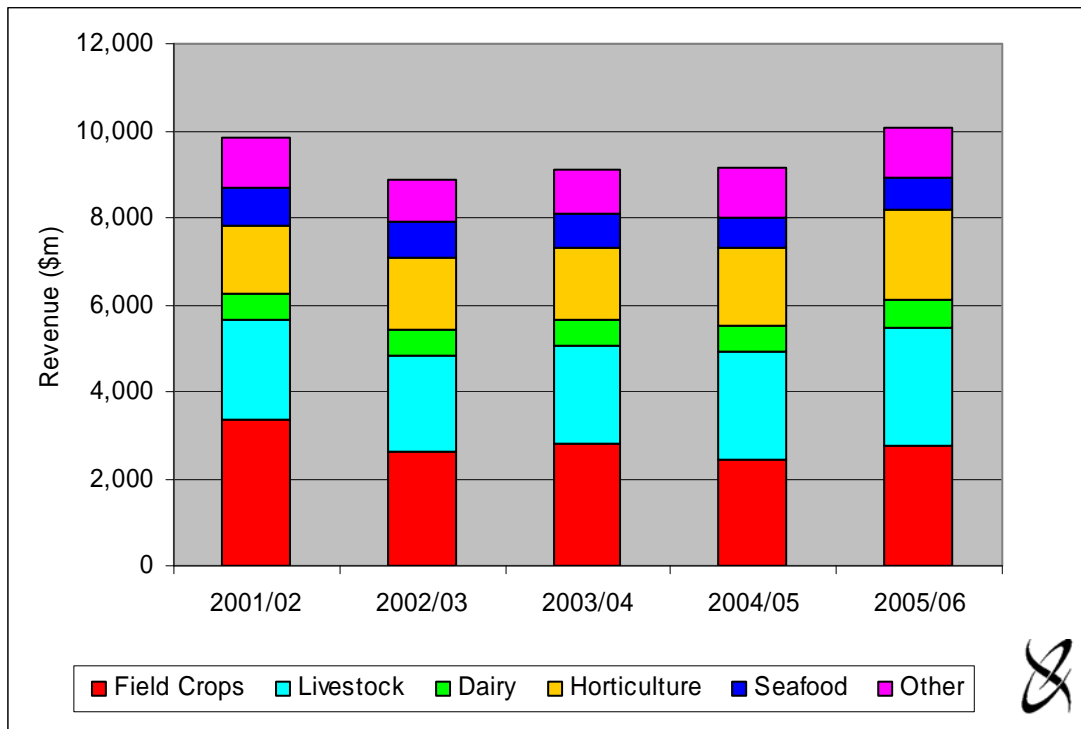


Source: PIRSA (2007).

Agricultural activities in the Murraylands are concentrated in the livestock, dairy and horticulture sectors which, in 2005/06, accounted for approximately 85 per cent of the region's gross food revenue. Field crops and seafood comprised 10.6 per cent and 0.5 per cent respectively of gross food revenue for 2005/06 (Figure 10.1).

The Murraylands region's gross food revenue of \$949.2 million in 2005/06 represents 9.4 per cent of the state's gross food revenue. Total livestock revenue was \$424.1 million in 2005/06, key livestock industries in the Murraylands are pigs, beef, wool, sheep and poultry meat and egg production. The horticulture industry in the Murraylands generated \$214.5 million and is comprised mainly of potatoes, onions, lettuces and carrots. Field crops generated \$101.1 million, major field crops in the region are wheat, barley, oats and canola.

Figure 10.2 Estimated gross value of food production in SA, 2001/02 to 2005/06



Source: PIRSA (2007).



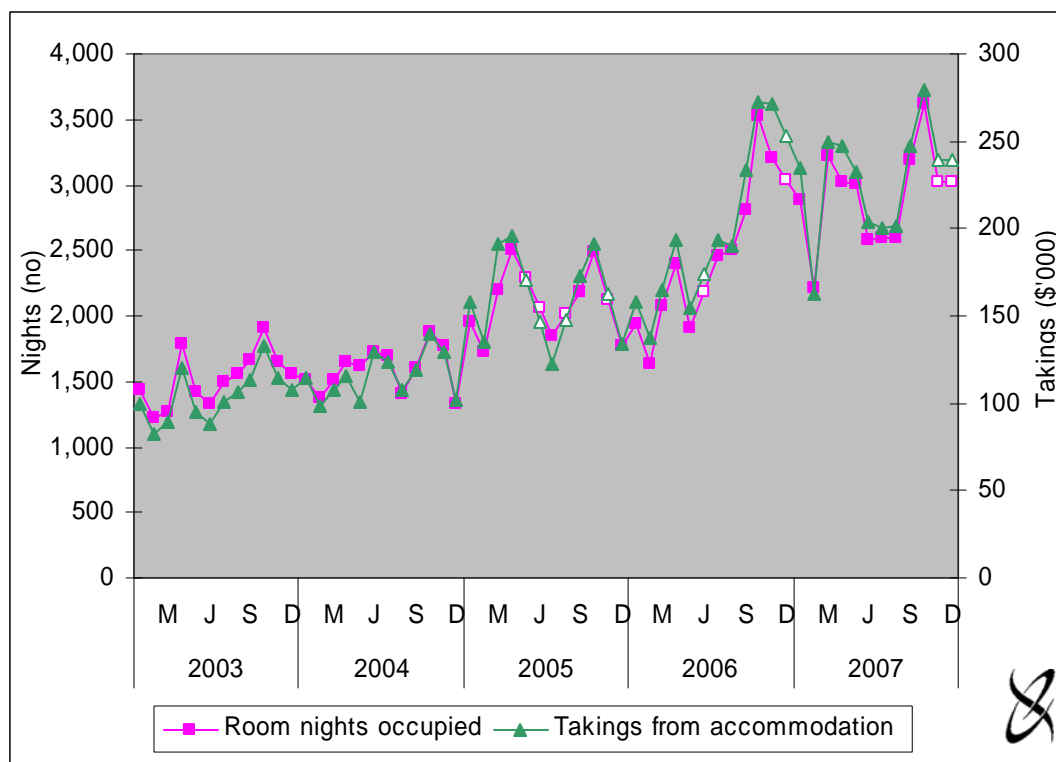
11. Tourism

This section provides descriptive and comparative statistics of some tourism related indicators including accommodation takings⁹ and room occupancy rate¹⁰ for hotels, motels and serviced apartments with 15 or more rooms in the Murraylands and SA.

Note: Some data were unavailable for some months. Values have been interpolated where complete data were unavailable for illustrative purposes, based on previous and subsequent months. The months where data have been interpolated are illustrated by the white data points.

The total number of rooms occupied and total accommodation takings by hotels, motels and serviced apartments with 5 or more rooms in the Murraylands are illustrated in Figure 11.1.

Figure 11.1 Rooms occupied and takings in the Murraylands, 2003 to 2007



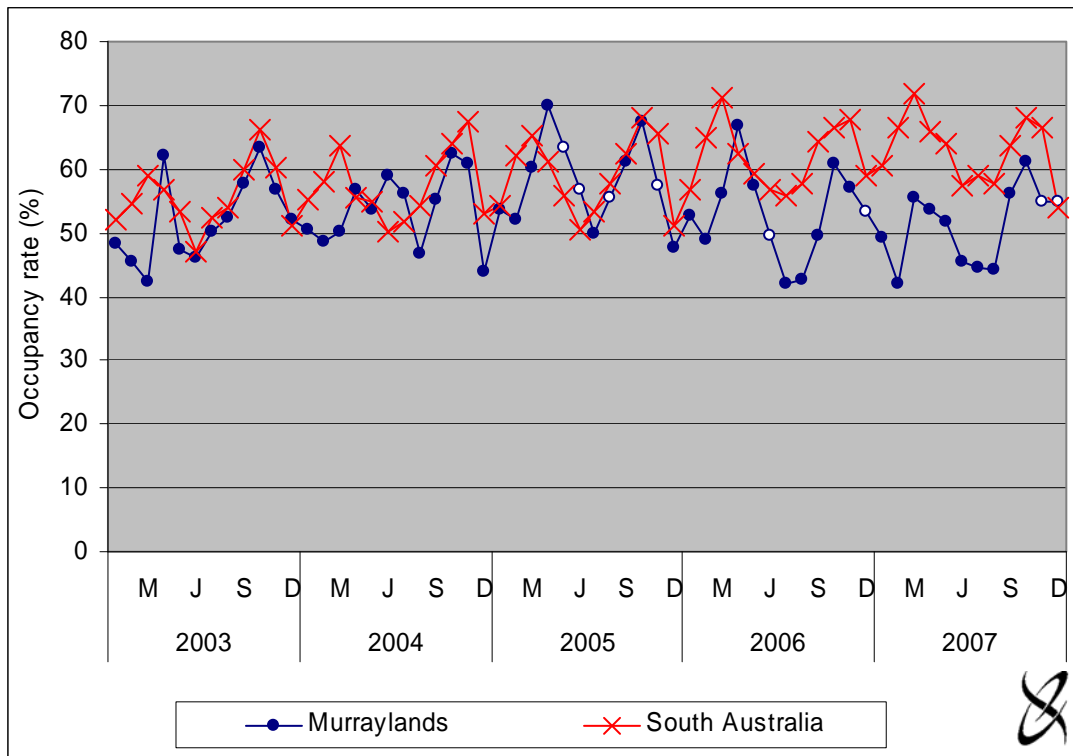
Source: ABS (2008d).

The room occupancy rate and the takings per occupied room night for hotels, motels or serviced apartments with 5 rooms or more in the Murraylands and SA are illustrated in Figures 11.2 and 11.3.

⁹ Accommodation takings include gross revenue from the provision of accommodation, including GST. Takings from meals are excluded.

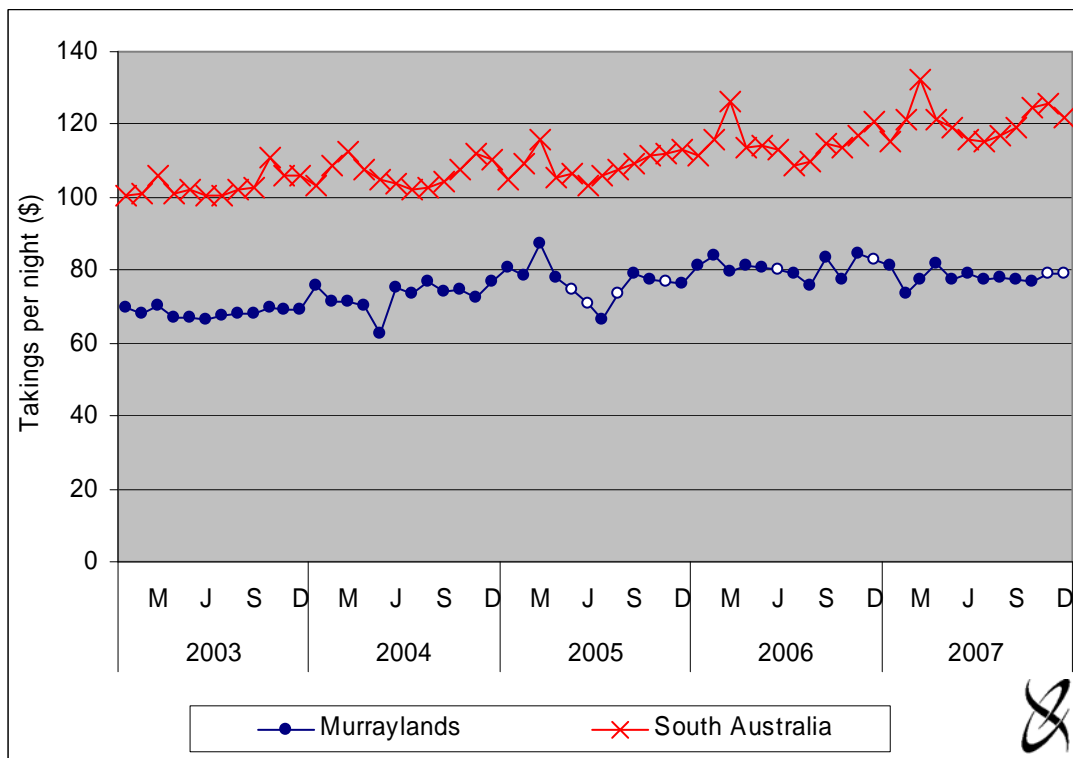
¹⁰ Room occupancy rate (%) = (Room nights occupied ÷ Room nights available) * 100.

Figure 11.2 Room occupancy rate in the Murraylands and SA, 2003 to 2007



Source: ABS (2008d).

Figure 11.3 Takings per room in the Murraylands and SA, 2003 to 2007



Source: ABS (2008d).



The room occupancy rate in the Murraylands averaged 54 per cent over the period, while the occupancy rate in SA was slightly greater at 59 per cent (Figure 11.2). Average takings per room in the Murraylands were lower than for SA. Over the period the average takings per room in the Murraylands was approximately \$75, while for SA it was almost \$110 dollars (Figure 11.3).



12. Gross Regional Product

Contribution to gross regional/state product (GRP/GSP) is a measure of the net contribution of an activity to the regional or national economy. Contribution to GRP/GSP is measured as value of output less the cost of goods and services (including imports) used in producing the output. In other words, it can be measured as household income plus other value added (gross operating surplus and all taxes, less subsidies). It represents payments to the primary inputs of production (labour, capital and land). Using contribution to GRP as a measure of economic impact avoids the problem of double counting that may arise from using value of output for this purpose.

Gross Regional Product can be calculated for the Murraylands from the information provided in a regional input-output table for 2002/03 (EconSearch 2005). Estimates for subsequent years have been based on changes in employment by industry at a regional level, changes in wage rates by industry and changes in business profitability, also at an industry level. GSP is published annually by the ABS as part of their National Account: State Account series.

Table 12.1 Gross regional production in the Murraylands and SA, 2002/03 to 2006/07

	2002/03	2003/04	2004/05	2005/06	2006/07
Murraylands					
- GRP (\$m)	840	899	911	967	968
- Nominal growth over previous year (%)	-	7.1%	1.3%	6.1%	0.1%
- Real growth over previous year (%)	-	4.0%	-0.8%	2.2%	-1.5%
South Australia					
- GSP (\$m)	55,540	59,297	61,607	65,177	69,540
- Nominal growth over previous year (%)	-	6.8%	3.9%	5.8%	6.7%
- Real growth over previous year (%)	-	3.7%	1.7%	1.9%	4.9%

Source: ABS (2007e), ABS (2008b), EconSearch (2005) and EconSearch analysis.

The Murraylands and SA GRP/GSP were estimated to be \$968 million and \$69,540 million, respectively, in 2006/07. The GRP of the Murraylands region comprised approximately 1.5 per cent of the SA GSP over the four years (Table 12.1).

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