Socio-Economic Profile of the Adelaide Hills Fleurieu Kangaroo Island Regional Development Australia Region

A report to

Regional Development Australia Adelaide Hills Fleurieu Kangaroo Island

Prepared by

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ABBREVIATIONS

ABS	Australian Bureau of Statistics
AHFKI	Adelaide Hills, Fleurieu and Kangaroo Island
ARIA	Accessibility/Remoteness Index of Australia
ATO	Australian Taxation Office
DC	District council
DE	Department of Employment
DEPI	Department of Environment and Primary Industries (Victoria)
ERP	estimated resident population
fte	full-time equivalent
GP	General Practitioner
GSP	gross state product
GST	goods and services tax
GRP	gross regional product
I-O	Input-Output (analysis)
KI	Kangaroo Island
LGA	local government area
NBN	National Broadband Network
NSW	New South Wales
RDA	Regional Development Australia
RISE	Regional Industry Structure and Employment (impact model)
SA	South Australia
Vic	Victoria

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EXECUTIVE SUMMARY

The socio-economic profile of the Adelaide Hills, Fleurieu and Kangaroo Island Regional Development Australia (AHFKI RDA) region provides a statistical summary of key economic and social information for the region, the component local government areas (LGA), the McLaren Vale Character Preservation District and, where possible, South Australia (SA). The six LGAs that comprise the region are the Adelaide Hills (DC), Mount Barker (DC), Alexandrina (DC), Victor Harbor (C), Yankalilla (DC) and Kangaroo Island (DC). In addition, this report includes data for the Maclaren Vale Character Preservation District covered by the ABS Statistical Area level 2 (SA2) geography of Clarendon, McLaren Vale and Willunga.

Total population and population projections

In 2015/16 the estimated resident population in the AHFKI RDA region was almost 136,000 persons, representing approximately 8.0 per cent of the state total (approximately 1.71 million persons).

Over the 11 years, 2005/06 to 2015/16, the AHFKI RDA region experienced steady population growth, with the total population increasing by 13 per cent, compared to 10 per cent for SA.

Based on the Planning SA projections, the population in the AHFKI RDA region will increase by almost 30 per cent over the 20 years from 2011 (Census year) whereas the total SA population is expected to increase by around 18 per cent.

Population profile by age, birth and death rates

Compared with the age distribution of the state, the AHFKI RDA region has a similar concentration of younger people (aged 0 to 14 years), a slightly smaller than average share of persons aged 15 to 64 years and a larger share of people aged 65 and over. The 15 to 64 year age group could be characterised as the working-age population.

Compared to the age structure of persons aged 65 and over for the state as a whole, the AHFKI RDA region has a higher proportion of persons aged 69 to 74 but a lower proportion of persons aged 75 and over.

The crude birth rate for the AHFKI RDA region decreased slightly from 10.5 in 2003/04 to 9.2 in 2014/15. The crude birth rate for SA was higher in 2014/15 (11.5 births per thousand residents) than in 2003/04 (11.2 births per thousand residents).

The crude death rate for the AHFKI RDA region increased from 6.6 in 2003/04 to 7.3 in 2014/15. The crude death rate for SA was slightly higher in 2014/15 (8.0 deaths per thousand residents) than in 2003/04 (7.6 deaths per thousand residents) despite slight fluctuations in between years.

A steady increase in the population, together with a falling birth rate and a rising death rate, would imply significant inward population migration to the AHFKI region.

Regional Migration

The majority of AHFKI RDA region residents (78 per cent) were living in the AHFKI RDA region five years ago (2006, the time of the previous Census). Of those residents who have moved into the region (almost 37,000 persons across all age groups) around 56 per cent came from an Adelaide metropolitan LGA, 14 per cent from other SA regions, 19 per cent from interstate and 10 per cent from overseas.

Of those residents who have moved out of the region (approximately 26,000 persons across all age groups) around 36 per cent moved to an Adelaide metropolitan LGA, 48 per cent moved to other regions in SA and 16 per cent moved interstate.

Between 2006 and 2011 the number of in-migrating residents (almost 37,000 persons) was well above the number of out-migrating residents (approximately 26,000 persons). The age profile of the two groups was also similar, but with some notable differences:

- The age group of 15-29 years comprised a larger proportion of out-bound migrating residents (35 per cent) than of in-bound migrating residents (17 per cent).
- By contrast, there was a greater proportion of in-bound migrating residents in all other age cohorts.

Clearly, a higher proportion of people aged between 15 and 29 are leaving the AHFKI RDA region than moving into the region.

Education, employment and labour force

The total number of students enrolled in primary school in the AHFKI RDA region increased by 1 per cent between 1996 and 2016. The total number of AHFKI RDA region students enrolled in secondary school increased by 31 per cent between 1996 and 2016.

Enrolments in non-government schools accounted for 39 per cent of total school enrolments in the AHFKI RDA region in 2016. In 1996 the proportion of enrolments in non-government schools was 28 per cent.

Between 1996 and 2016 the total number of AHFKI RDA region residents enrolled in a higher education institute increased by 75 per cent, a significantly greater increase than for SA as a whole (50 per cent).

In 2011 approximately 56 per cent of all persons aged 15 or over in the AHFKI RDA region held some form of non-school qualification (increasing from 43 per cent in 1996). The level of qualification was generally higher for the AHFKI RDA region than for SA (45 per cent in 2011 and 39 per cent in 2006).

The total number of persons in the labour force in the AHFKI RDA region fluctuated over the years 2008 to 2017 ranging from a low of 62,481 in March 2008 to a high of 70,953 in March 2017. Despite some fluctuations, the labour force in SA increased over the 8 years, from 803,013 in March 2008 to 873,417 in March 2017.

Comparison of the two end quarters (March 2008 and March 2017) indicate that the total number of unemployed persons increased by 2,020 persons (approximately 118 per cent increase) in the AHFKI RDA region. The number of unemployed persons in SA also increased, by 20,756 persons (approximately 55 per cent increase).

The unemployment rate in the AHFKI RDA region fluctuated over the period 2008 to 2017 and was estimated to be 5.2 per cent in March 2017, lower on average than the rate for SA (6.7 per cent in March 2017) over the same period.

The labour force participation rate for the AHFKI RDA region decreased slightly over the eight years (2007/08 to 2014/15), from 63.7 per cent in 2007/08 to 61.9 per cent in 2014/15. The labour force participation rate in SA also decreased slightly, from 62.1 in 2007/08 to 61.2 per cent in 2014/15. Over the eight-year period the participation rate for the AHFKI RDA region was on average higher than for SA as a whole.

The majority of people who work in the AHFKI RDA region live in the AHFKI RDA region (82 per cent in 2006 and 81 per cent in 2011). Of the remaining people who work in the AHFKI RDA region, 16 per cent live in an Adelaide metropolitan LGA and the remainder (3 per cent) live in another regional LGA.

Income and housing

The proportion of taxable individuals compared to non-taxable individuals in the AHFKI RDA region decreased from 78 per cent in 2000/01 to 72 per cent in 2014/15. Despite a decrease over the 15 years (from 81 per cent to 75 per cent), the proportion of taxable individuals in SA as a whole was greater than the AHFKI RDA region in all years.

The mean individual taxable income in the AHFKI RDA region was lower than the state average over the whole period, in both nominal and real terms.

The average value per approval for residential dwellings in the AHFKI RDA region more than doubled between 2001/02 and 2015/16 from $115,000 to $285,000 (148 per cent). For SA, the value per approval increased from $128,000 in 2001/02 to $259,000 in 2015/16, an increase of 102 per cent.

A measure of housing cost was estimated using a weighted average of rental payments and mortgage payments. Housing affordability was then estimated as housing cost as a proportion of income. Using these estimates, housing was most affordable in the Adelaide Hills LGA and least affordable in the Yankalilla LGA. For the AHFKI RDA region housing affordability was estimated to be 28 per cent, slightly less affordable than the state as a whole (26 per cent).

Between 2006 and 2016 the total number of AHFKI RDA region dwellings with internet access (broadband, dial-up or other) increased by 58 per cent, similar to SA as a whole. In 2016, 13 per cent of dwellings in the AHFKI region had no access to any form of internet, compared to 17 per cent for SA as a whole.

Assuming the NBN coverage is for the entirety of the postcode published then 80 per cent of the AHFKI RDA region has or will have NBN coverage in the near future.

Health and wellbeing

The proportion of the population with health risk factors (smoking, harmful use of alcohol, being overweight and obesity) was similar to SA as a whole. On individual factors the AHFKI RDA region has a slightly lower number of people who smoke (9 per cent compared to 11 per cent for SA as a whole), are overweight (25 per cent compared to 27 per cent for SA), are obese (21 per cent compared to 23 per cent for SA) and a slightly higher proportion of people who consume harmful levels of alcohol (15 per cent compared to 13 per cent for SA).

The rate of access to GP services in the AHFKI region was 536 per 1,000 persons in 2007/08, similar to SA as a whole (535 per 1,000 persons).

In the AHFKI RDA region 14 per cent of the population received the age pension in 2014 (up from 13 per cent in 2009), 3 per cent received a disability pension (same as in 2009), 1 per cent received single parent payment (same as in 2009) and 3 per cent received unemployment benefits (up from 2 per cent in 2009). For SA as a whole the proportion of the population who received the aged pension was slightly lower than the AHFKI RDA region (12 per cent in 2014 and 2009), whereas the proportion who received a disability pension, single parent payment or unemployment benefits was slightly higher.

Adelaide Hills, Mount Barker, McLaren Vale and Alexandrina have adaptive capacities above the state average for all LGAs. Adaptive capacity is a measure of a community's resilience or capacity to manage change. Conversely, Kangaroo Island, Yankalilla and Victor Harbor have adaptive capacities below the state average for all LGAS.

Business

In the AHFKI RDA region in 2016 the industries with the most number of businesses were agriculture, forestry and fishing (27 per cent of the total number of businesses in the region) and construction (17 per cent). For SA the industries with the most number of businesses were construction (15 per cent of total businesses in SA), agriculture, forestry and fishing (13 per cent), rental, hiring and real estate services (12 per cent) and financial and insurance services (11 per cent).

In the AHFKI RDA region the majority of businesses (66 per cent) did not employ another person, 23 per cent employed between 1 and 4 persons, 9 per cent employed between 5 and 19 people, 1 per cent employed between 20 and 199 and no businesses employed more than 200 people, very similar to SA as a whole.

At the time of the 2011 Census, the highest proportion of business owners fell in the 34 to 64 year age cohort in the AHFKI RDA region and for SA as a whole. The industry sectors where business ownership was greatest were the construction (20 per cent), agriculture, forestry and fishing (12 per cent) and professional, scientific and technical services (10 per cent) sectors. For SA as a whole the industry sectors where business ownership was greatest were the construction (19 per cent), agriculture, forestry and fishing (11 per cent), professional, scientific and technical services (9 per cent) and retail trade (9 per cent) sectors.

Economic Structure of the Regional Economy

The top five contributors to total employment in the region in 2015/16 were the retail trade, health and community services, agriculture, forestry and fishing, manufacturing and education and training sectors.

In 2015/16 employment in South Australia was approximately 733,500 (total jobs) which means the AHFKI RDA region accounts for approximately 5.7 per cent of the total state employment.

In 2015/16, the top five contributors to gross regional product (GRP) were the agriculture, forestry and fishing, ownership of dwellings, manufacturing, health and community services and building and construction sectors.

In 2015/16 South Australia's gross state product (GSP) was $100.3 billion. The AHFKI RDA region contributes approximately 4.8 per cent of GSP towards the state economy.

In aggregate, it was estimated that the expenditure by tourists ($650m) generated approximately $491 million in GRP (10.2 per cent of the regional total ($4.83 billion)), around 5,515 full-time and part-time jobs (13.2 per cent of the regional total (341,833 total jobs)) and 4,485 fte jobs (12.0 per cent of the regional total (37,229 fte)).

1. INTRODUCTION

EconSearch was commissioned by Regional Development Australia Adelaide Hills, Fleurieu and Kangaroo Island to prepare a socio-economic profile of the Adelaide Hills, Fleurieu and Kangaroo Island Regional Development Australia (AHFKI RDA) region. This report provides an update of similar reports prepared for the AHFKI RDA in 2011, 2012, 2013 and 2015 (EconSearch 2016). The aim of the economic profile is to present a statistical summary of key economic and social information for the AHFKI RDA 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 aid understanding of the composition and economic and social structure of the region (economic capital and human capital), to indicate how the AHFKI RDA region contributes to the state's economy and to help monitor trends in economic growth or decline. Most data are presented for the AHFKI RDA region and for SA as a whole for the purpose of comparisons, with some regional disaggregation. The regional economic and social indicators are categorised under the following headings:

- total population and projections (Section 2)
- population profile by age, birth and death rates (Section 3)
- regional migration (Section 4)
- education, employment and labour force (Section 5)
- income and housing (Section 6)
- health and wellbeing (Section 7)
- business (Section 8)
- regional economic structure including the contribution of tourism to the regional economy (Section 9).

The information included in this report is historical, as well as being the latest available 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 please refer to the relevant source publications that are listed in the References.

The AHFKI RDA region is located east and south of Adelaide. The area includes the major centres of Mount Barker and Victor Harbor and many major towns including Stirling, Strathalbyn, Goolwa, Yankalilla and Kingscote. The region covers six local government areas (LGA):

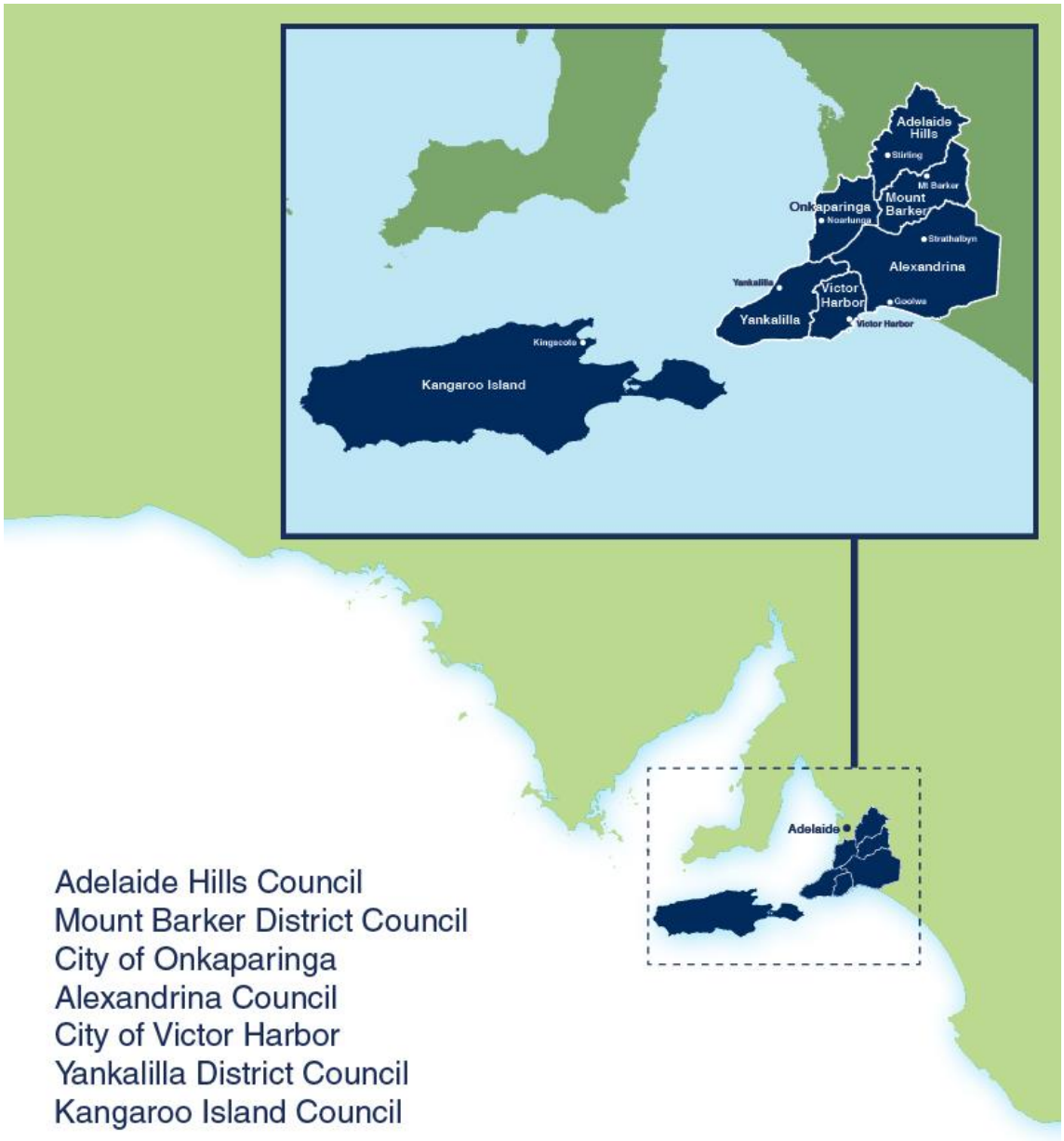
- Adelaide Hills Council
- Mount Barker District Council
- Alexandrina Council
- City of Victor Harbor

- Yankalilla District Council
- Kangaroo Island Council.

In addition, this report includes data for the Maclaren Vale Character Preservation District covered by the ABS Statistical Area 2 level (SA2s) geography of Clarendon, McLaren Vale and Willunga.

The AHFKI RDA Region and component local government areas are illustrated below.

Figure 1-1 The AHFKI RDA region



Source: AHFKI RDA

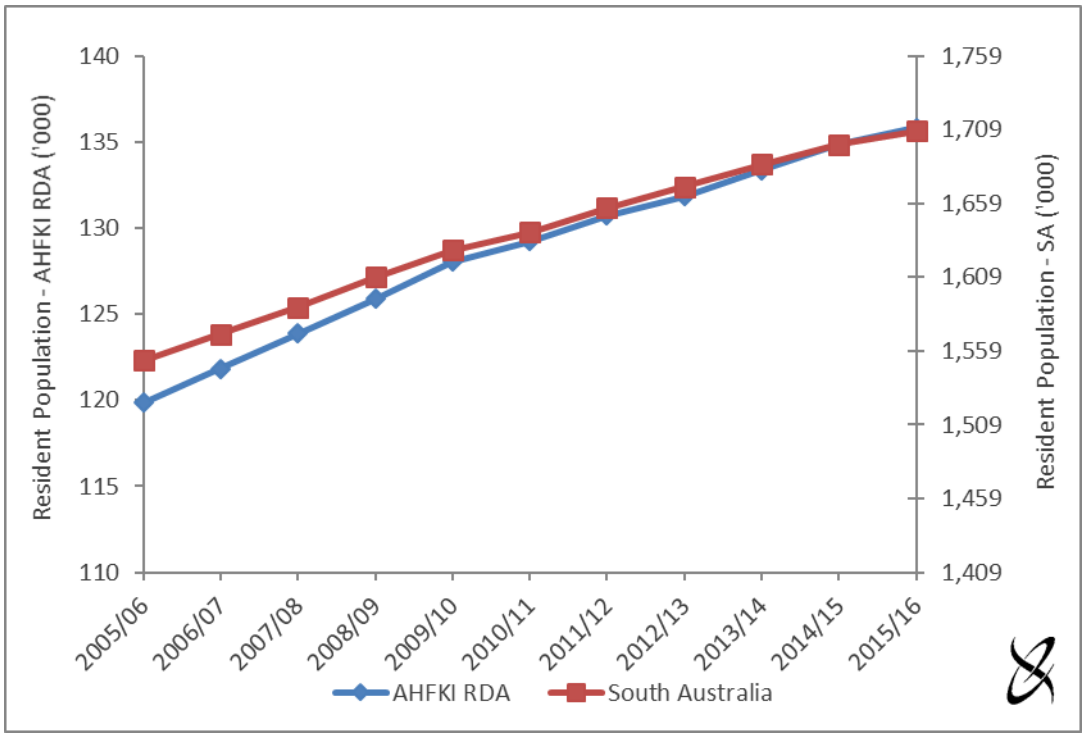
2. TOTAL POPULATION AND POPULATION PROJECTIONS

2.1 Estimated Resident Population (ERP)

The ERP for the AHFKI RDA region and SA are illustrated in Figure 2-1 and for the AHFKI RDA region by LGA in Figure 2-2, for the period 2005/06 to 2015/16.

In 2015/16 the ERP in the AHFKI RDA region was almost 136,000 persons, representing 8.0 per cent of the state total (approximately 1.71 million persons). Over the 11 years, 2005/06 to 2015/16, the AHFKI RDA region experienced steady population growth, with the total population increasing by 13 per cent (almost 16,000 persons). Similarly, SA experienced steady population growth over these years, although at a slower rate, with the population increasing by 10 per cent.

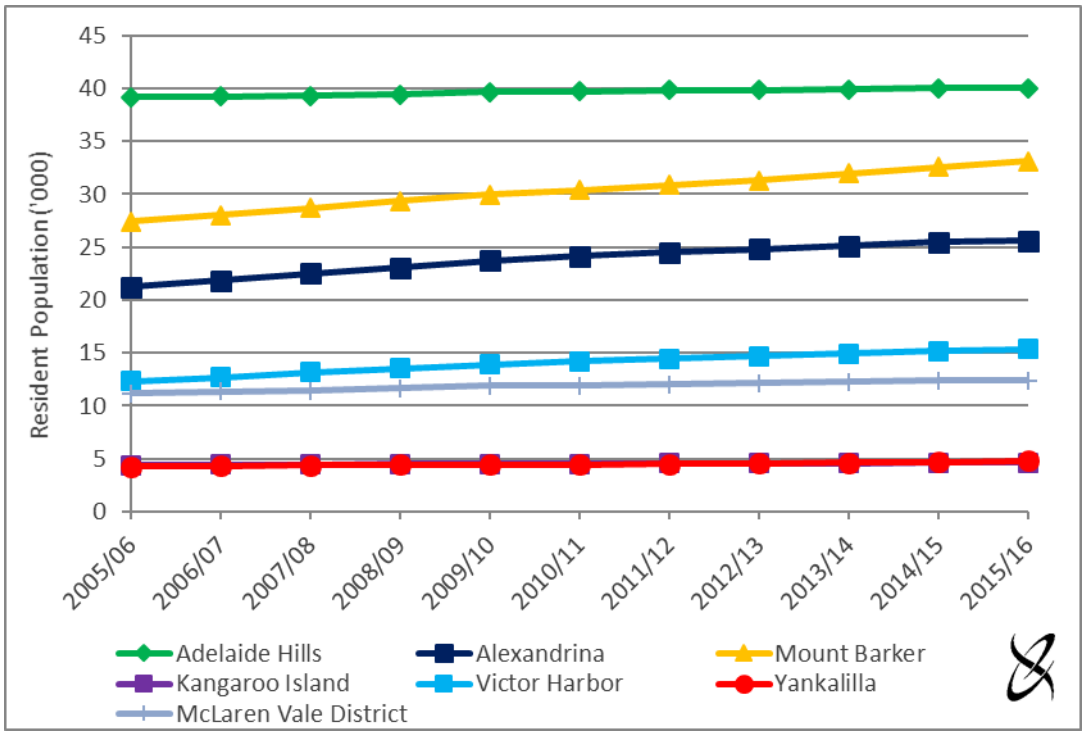
Figure 2-1 Estimated resident population in the AHFKI RDA region and SA, 2005/06 to 2015/16



Source: ABS (2017a)

Population growth above the state average in the AHFKI RDA region was a result of a significant increase in the population of Victor Harbor, Alexandrina and Mount Barker (each with population increases over 20 per cent). More modest population increases occurred in Yankalilla (13 per cent) and the McLaren Vale District (11 per cent), on Kangaroo Island (5 per cent) and in the Adelaide Hills (2 per cent) (Figure 2-2).

Figure 2-2 Estimated resident population in the AHFKI RDA region by LGA, 2005/06 to 2015/16



Source: ABS (2017a)

2.2 Population Change

Population statistics for the two latest census years for the AHFKI RDA region (disaggregated by local government area) and South Australia are detailed in Table 2-1.

Table 2-1 Population change, AHFKI RDA region and SA, 2011 and 2016 (no. of persons)

	Census Year		% change from 2011
	2011	2016	
AHFKI RDA Region			
Adelaide Hills	38,628	38,855	0.6%
Alexandrina	23,697	25,879	9.2%
Mount Barker	29,769	33,385	12.1%
Kangaroo Island	4,416	4,713	6.7%
Victor Harbor	13,839	14,660	5.9%
Yankalilla	4,395	5,165	17.5%
McLaren Vale District	11,636	12,037	3.4%
Total AHFKI RDA Region	126,380	134,694	6.6%
South Australia	1,596,569	1,659,847	4.0%

Source: ABS (2017e)

Overall the population in the AHFKI RDA region increased by 6.6 per cent between 2011 and 2016. This increase is comprised of 17.5 per cent population growth in Yankalilla, 12.1 per cent

growth in Mount Barker, 9.2 per cent growth in Alexandrina, 6.7 per cent growth on Kangaroo Island, 5.9 per cent growth in Victor Harbor, 3.4 per cent growth in the McLaren Vale District and 0.6 per cent growth in the Adelaide Hills LGA. The population of South Australia as a whole increased by 4.0 per cent between 2011 and 2016 (Table 2-1).

2.3 Population Projections

It is possible to derive broad population projections for the AHFKI RDA region and SA for the period 2011 to 2031 based on information published by the Department of Planning and Local Government. Population projections for the AHFKI RDA region and SA, for the period 2011 to 2031 are detailed in Table 2-2 and illustrated in Figure 2-3 and Figure 2-4.

The projections are based on ABS 2011 Census resident population estimates and trends in mortality, fertility and overseas and interstate migration. The 30-Year Plan for Greater Adelaide identifies the key strategic planning priorities for the development of the Greater Adelaide Region during the next thirty years. The Plan was based on an all-of-State projection specially prepared for that purpose in late 2007 that used preliminary 2006 Census results (Department of Planning and Local Government (DPLG) 2010a). The results presented below are the new set of official projections based on final 2006 Census results.[1]

The 30-Year Plan for Greater Adelaide (The Plan) sets a significant target for population growth. The Plan sets a target of 29,000 people in the Adelaide Hills region of which 13,400 will be provided by Murray Bridge and surrounds (DPLG 2010b). The remaining 15,600 growth target for the Adelaide Hills will principally occur in the Mount Barker District Council and is likely to occur within the next 15 years (according to the Mt Barker Urban Growth DPA (2010)). This would imply a target growth rate of around 50 per cent on the 2009/10 population level for Mount Barker (approximately 30,500).

The Plan also sets a target of 22,000 in the Fleurieu region over the next 30 years (DPLG 2010b). This would be an increase of approximately 50 per cent on the 2009/10 population level for the Fleurieu region (approximately 42,500 in the Alexandrina, Victor Harbor and Yankalilla LGAs).

Based on the Planning SA projections, the population in the AHFKI RDA region will increase by almost 30 per cent over the 20 years from 2011 (Census year) whereas the total SA population is expected to increase by around 18 per cent (Figure 2-3).

Population projections for persons aged 0 to 14 years indicate that there will be an increase (14 per cent from 2011) in this age cohort. The working age population (15 to 64 years) is also projected to increase (by 15 per cent from 2011). The population projections for persons 65 or older indicate that a significant increase of around 97 per cent in this age cohort is expected over the 20 years (Table 2-2).

[1] 'It is now considered that population growth in some Outer Adelaide LGAs for the early years of the 30-Year Plan (2011-26) will be slightly less than that implicitly assumed in the medium series of the all-of-State and Statistical Division projections upon which they are based. As a result the sum of all LGA projections for the years 2011-26 will differ slightly from the State projections released in January 2011' (DPLG 2010b).

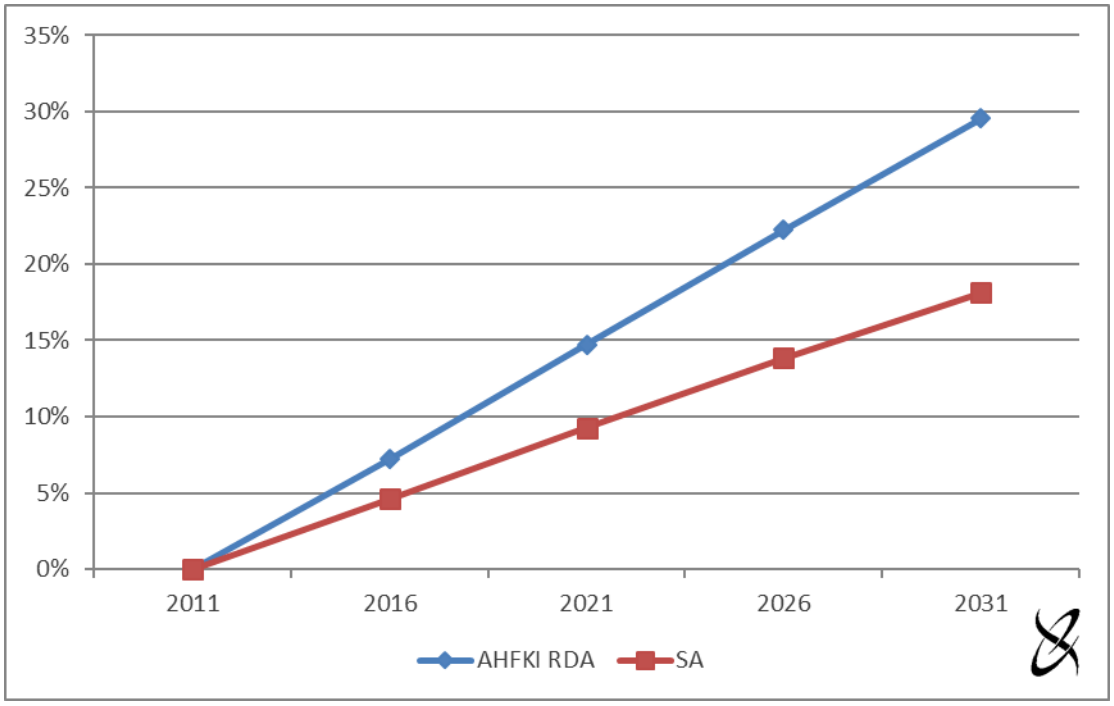
Table 2-2 Population projections for the AHFKI RDA region and SA, 2011 to 2031

Age	2011	2016		2021		2026		2031	
	Population	Population	Change from 2006	Population	Change from 2006	Population	Change from 2006	Population	Change from 2006
	no.	no.	%	no.	%	no.	%	no.	%
AHFKI RDA									
0-14	23,793	24,663	3.7%	25,754	8.2%	26,167	10.0%	27,089	13.9%
15-64	82,131	84,238	2.6%	87,349	6.4%	90,899	10.7%	94,449	15.0%
65+	23,320	29,670	27.2%	35,170	50.8%	40,929	75.5%	45,902	96.8%
Total	129,244	138,571	7.2%	148,273	14.7%	157,995	22.2%	167,440	29.6%
SA									
0-14	290,659	304,557	4.8%	318,849	9.7%	326,328	12.3%	328,519	13.0%
15-64	1,087,362	1,107,895	1.9%	1,129,698	3.9%	1,153,799	6.1%	1,184,999	9.0%
65+	261,593	302,847	15.8%	343,220	31.2%	386,588	47.8%	423,294	61.8%
Total	1,639,614	1,715,299	4.6%	1,791,767	9.3%	1,866,715	13.9%	1,936,812	18.1%

Source: DPLG (2016)

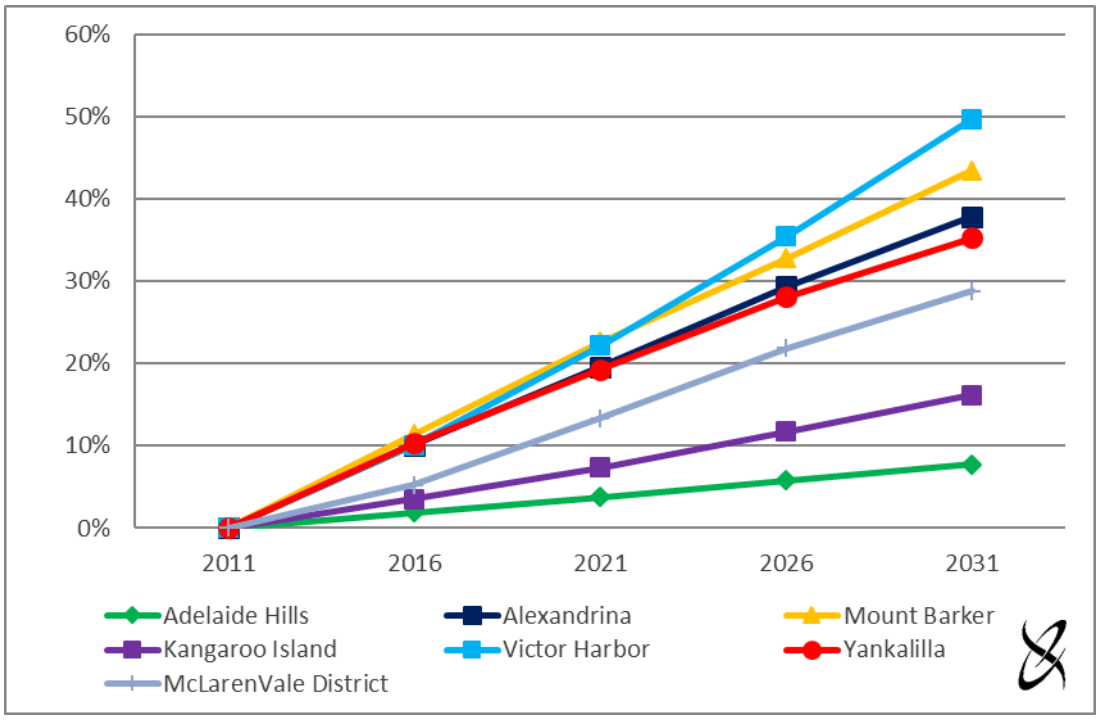
Population is projected to increase in each of the component local government areas and the McLaren Vale District by at least 20 per cent, except for on KI were population is projected to increase by 16 per cent and in the Adelaide Hills where population is projected to increase by 8 per cent (Figure 2-4).

Figure 2-3 Population projections for the AHFKI RDA region and SA, change from 2011



Source: DPLG (2016)

Figure 2-4 Population projections for the AHFKI RDA region by LGA, change from 2011



Source: DPLG (2016)

3. POPULATION BY AGE, BIRTH AND DEATH RATES

3.1 Age Distribution

3.1.1 Population

The age structures of the population for the AHFKI RDA region and SA for 2011 and 2016 (Census years) are summarised in Table 3-1.

Table 3-1 Age distribution of the population for the AHFKI RDA region and SA, 2011 and 2016 (no. of persons)

Age	AHFKI RDA			South Australia		
	2011	2016	% change from 2011	2011	2016	% change from 2011
0 to 14	23,576	23,499	0%	286,937	292,997	2%
15 to 64	79,797	80,894	1%	1,052,085	1,077,056	2%
65 or older	23,007	30,301	32%	257,547	289,794	13%
Total	126,380	134,694	7%	1,596,569	1,659,847	4%

Source: ABS (2017e)

Comparison with South Australia highlights some significant differences in changes in the age structure of the state and the AHFKI RDA regional populations between 2011 and 2016.

- Number of persons aged 0 to 14 years – remained the same in the AHFKI RDA region and increased by 2 per cent in SA.
- Number of persons aged 15 to 64 years – increased by 1 per cent in the AHFKI RDA region and 2 per cent in SA.
- Number of persons aged 65 years or older – increased by 32 per cent in the AHFKI RDA region and 13 per cent in SA.

The population age structure is summarised on an annual basis for the years 2004/05 to 2014/15 in Table 3-2. In 2014/15, 18 per cent of the region's population was under the age of 15 years, the majority of the population (approximately 61 per cent) was aged between 15 and 64 years and approximately 21 per cent of the population was aged over 65 years (Table 3-2).

Compared with the age distribution of the state, the AHFKI RDA region has a similar share of younger people (aged 0 to 14 years), a slightly smaller than average share of persons aged 15 to 64 years and a larger share of people aged 65 and over. The 15 to 64 year age group can be characterised as the working-age population.

Table 3-2 Age distribution of the population for the AHFKI RDA region and SA, 2004/05 to 2014/15

Age	Year										
	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
AHFKI RDA											
0 to 14	20%	19%	19%	19%	19%	18%	18%	18%	18%	18%	18%
15 to 64	65%	65%	65%	65%	65%	64%	64%	63%	62%	61%	61%
65 or older	15%	15%	16%	16%	17%	17%	18%	19%	20%	20%	21%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
South Australia											
0 to 14	18%	18%	18%	18%	18%	18%	18%	18%	18%	18%	18%
15 to 64	66%	67%	67%	67%	67%	66%	66%	66%	66%	65%	65%
65 or older	15%	15%	15%	15%	15%	16%	16%	16%	17%	17%	17%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: ABS (2016a)

A notable shift in the age structure of the population has occurred in the Alexandrina LGA. Between 2006 and 2011 the total number of person aged 65 or over living in the Alexandrina LGA increased by 33 per cent (Appendix Table 1-1).

3.1.2 Pensioners

The population age structure for persons aged 65 and over is summarised on an annual basis for the years 2004/05 to 2014/15 in Table 3-3. In 2014/15, 34 per cent of the region's aged population was aged 65 to 69, 25 per cent aged 70 to 74, 17 per cent aged 75 to 79, 12 per cent aged 80 to 84 and 12 per cent aged 85 and over (Table 3-3).

Table 3-3 Age distribution of the population for persons aged 65 and over for the AHFKI RDA region and SA, 2004/05 to 2014/15

Age	Year										
	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
AHFKI RDA											
65 to 69	31%	31%	31%	32%	32%	33%	34%	35%	35%	35%	34%
70 to 74	24%	24%	24%	24%	24%	24%	24%	24%	24%	25%	25%
75 to 79	20%	20%	19%	19%	18%	18%	17%	17%	17%	17%	17%
80 to 84	14%	14%	14%	14%	14%	14%	13%	13%	12%	12%	12%
85 and over	11%	11%	12%	12%	12%	12%	12%	12%	12%	12%	12%
Total over 65	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
South Australia											
65 to 69	27%	27%	27%	28%	28%	29%	29%	30%	31%	31%	31%
70 to 74	23%	23%	23%	23%	23%	23%	23%	23%	23%	23%	23%
75 to 79	22%	21%	20%	20%	19%	19%	18%	18%	18%	18%	18%
80 to 84	16%	16%	16%	16%	16%	16%	15%	15%	14%	14%	13%
85 and over	12%	13%	13%	14%	14%	14%	15%	15%	15%	15%	15%
Total over 65	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: ABS (2016a)

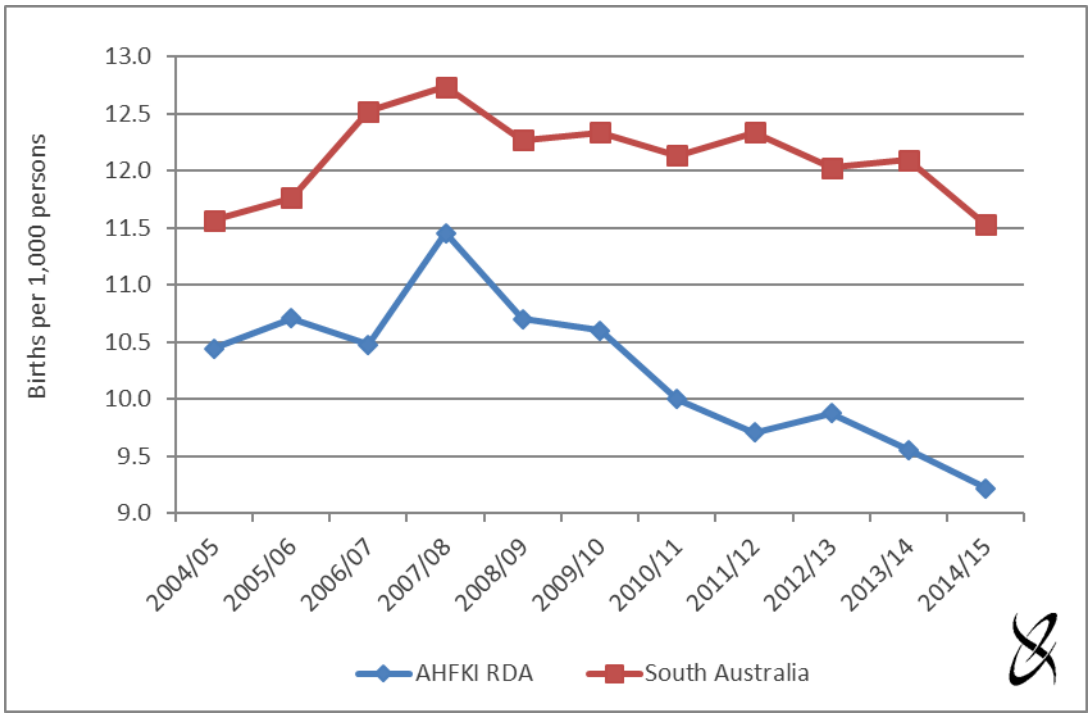
Compared to the age structure of persons aged 65 and over for the state as a whole, the AHFKI RDA region has a higher proportion of persons aged 69 to 74 but a lower proportion of persons aged 75 and over (Table 3-3).

3.2 Crude Birth Rates and Death Rates

Crude birth rates[2] are illustrated for the AHFKI RDA region and SA in Figure 3-1 and for the AHFKI RDA region by LGA in Figure 3-2, for the period 2004/05 to 2014/15.

The number of births in the AHFKI RDA region rose from 1,222 in 2004/05 to a peak of 1,419 in 2007/08 but has fallen since and was 1,243 in 2014/15. In SA the number of births rose from 17,140 in 2003/04 to a peak of 20,433 in 2011/12 but has also fallen since to 19,587 in 2014/15. The crude birth rate for the AHFKI RDA region decreased from 10.5 in 2004/05 to 9.2 in 2014/15. In comparison, the crude birth rate for SA was slightly higher in 2014/15 (11.5 births per thousand residents) than in 2004/05 (11.2 births per thousand residents) (Figure 3-1).

Figure 3-1 Crude birth rates in the AHFKI RDA region and SA, 2004/05 to 2014/15

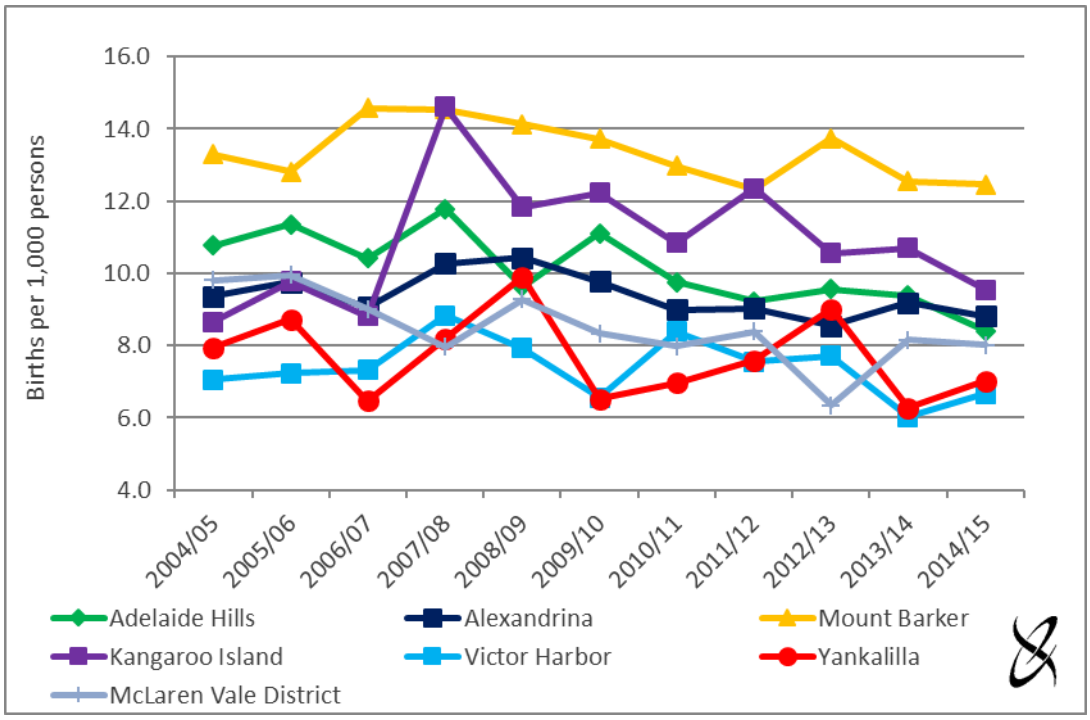


Source: ABS (2016a, b)

In 2014/15, the highest birth rate in the AHFKI RDA region was recorded in the Mount Barker LGA where there were 12.5 births per 1,000 residents. The lowest birth rate was in the Victor Harbor LGA where there were 6.7 births per 1,000 residents (Figure 3-2).

[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.

Figure 3-2 Crude birth rates in the AHFKI RDA region by LGA, 2004/05 to 2014/15



Source: ABS (2016a, b)

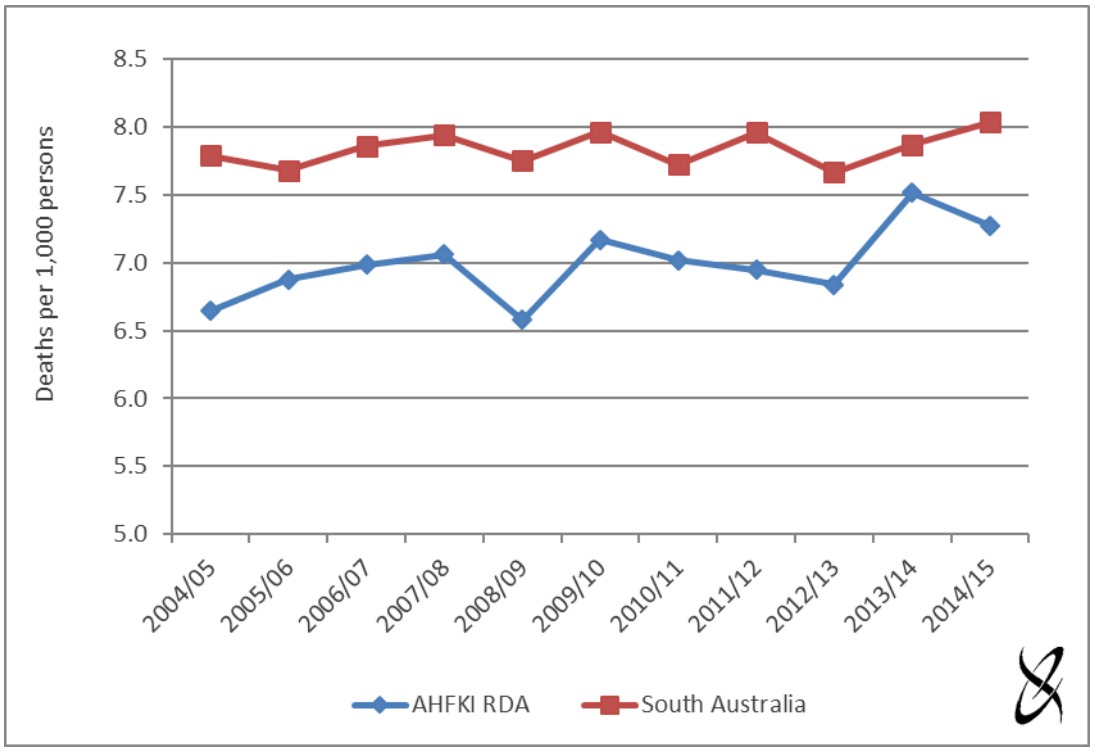
Crude death rates[3] are illustrated for the AHFKI RDA region and SA in Figure 3-3 and for the AHFKI RDA region by LGA in Figure 3-4, for the period 2004/05 to 2014/15.

The annual number of deaths in the AHFKI RDA region generally followed an increasing trend over the 11 years to 2014/15 but the death rate remained consistently below that for SA as a whole. In 2004/05, there were 787 deaths in the region and in 2014/15 there were 981 deaths in the region. Accordingly, the crude death rate for the AHFKI RDA region increased from 6.6 in 2004/05 to 7.3 in 2014/15. The crude death rate for SA was also higher in 2014/15 (8.0 deaths per thousand residents) than in 2004/05 (7.6 deaths per thousand residents) despite slight fluctuations in between years. The total number of deaths rose from 11,984 deaths in SA in 2004/05 to 13,647 in 2014/15 (Figure 3-3).

In 2014/15, the highest death rate in the AHFKI RDA region was in the Victor Harbor LGA (13.9 deaths per thousand residents). The lowest death rate in the region was in the Adelaide Hills LGA where there were 4.9 deaths per thousand residents (Figure 3-4).

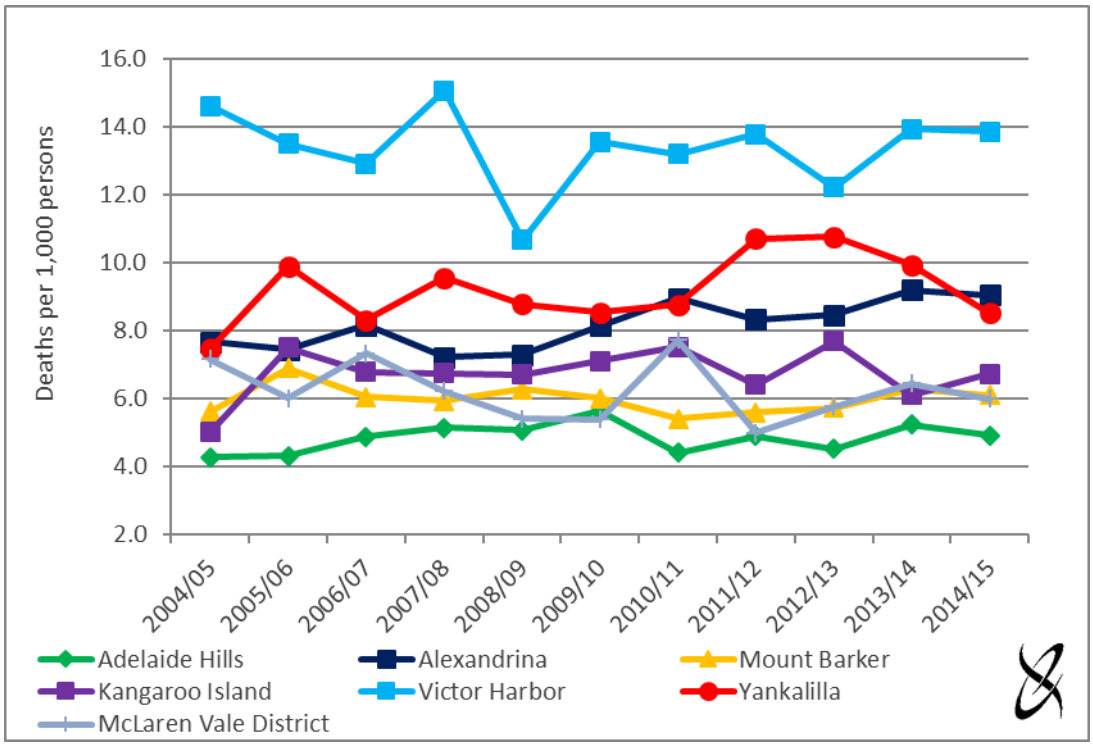
[3] The number of deaths are calculated on the basis of usual residence of the deceased, regardless of where in Australia the death occurred. The crude death rate is the number of deaths registered in the 12 months ending 30 June per 1,000 residents. The number of residents is equivalent to the ERP.

Figure 3-3 Crude death rates in the AHFKI RDA region and SA, 2004/05 to 2014/15



Source: ABS (2016a, c)

Figure 3-4 Crude death rates in the AHFKI RDA region by LGA, 2004/05 to 2014/15



Source: ABS (20156a, c)

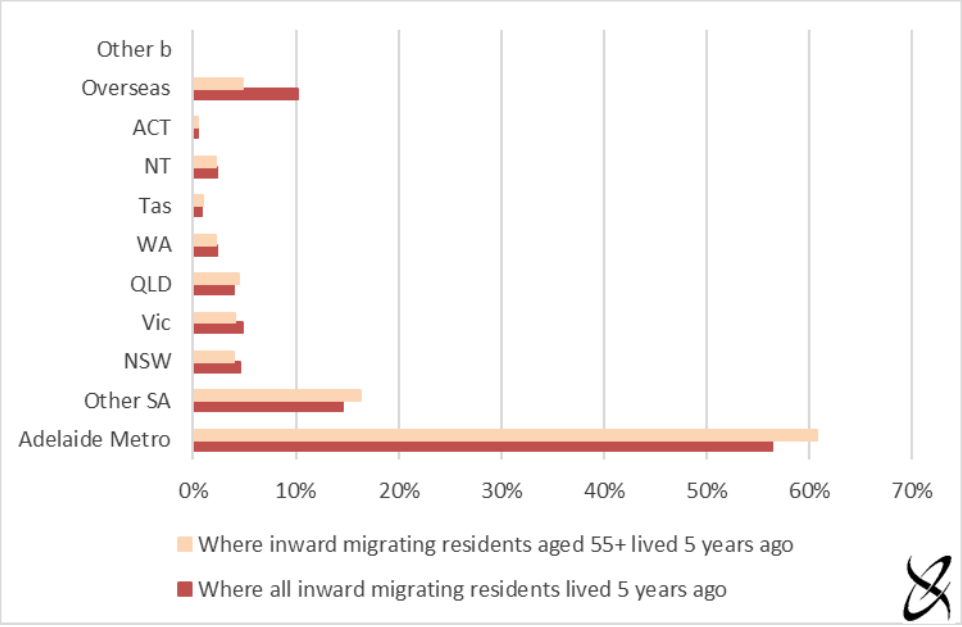
4. REGIONAL MIGRATION

4.1 In-Migration

The majority of AHFKI RDA region residents (78 per cent) were living in the AHFKI RDA region in 2006 (the time of the previous Census). Of those residents who moved into the region by 2011 (almost 37,000 persons across all age groups) around 56 per cent came from an Adelaide metropolitan LGA, 14 per cent from other SA regions, 19 per cent from interstate and 10 per cent from overseas (Figure 4-1).

The origin of inward migrating residents 55 years and over is similar to that of the total inward migrating population with a couple of notable differences (Figure 4-1). There were more from Adelaide metropolitan LGAs (61 per cent for the 55+ cohort compared to 56 per cent for the total inward migrating population), less from overseas (5 per cent for the 55+ cohort compared to 10 per cent for the total inward migrating population) and there was a lower proportion from interstate (especially NSW and Vic). For both groups the proportion coming from elsewhere in SA (Adelaide Metro plus other SA regions) was the around the same.

Figure 4-1 Where inward migrating residents lived in 2006 [a]



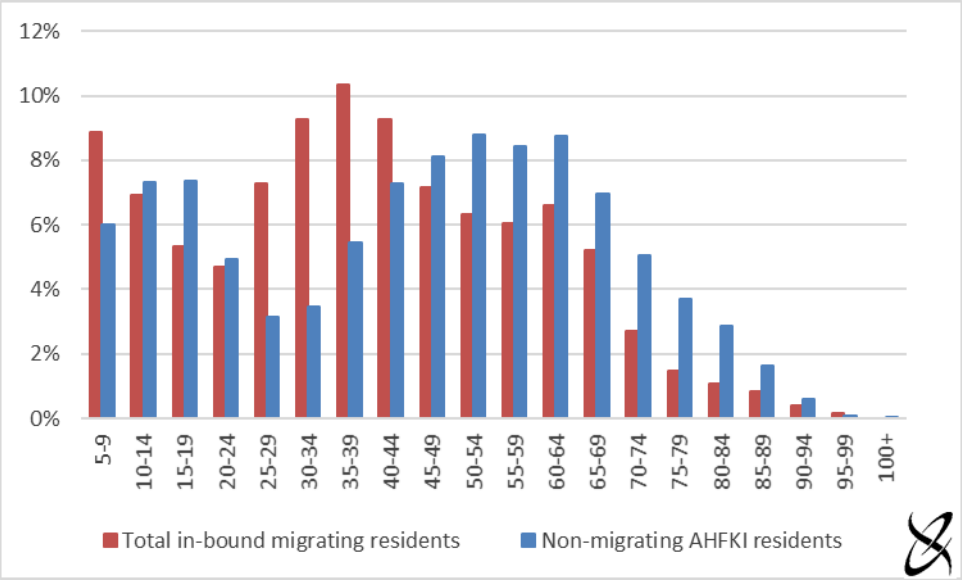
[a] Excludes those AHFKI RDA region residents who were living in the AHFKI RDA region 5 years ago.

[b] Other territories, excludes undefined and not stated.

Source: ABS (2017e)

The age profile of those residents who moved into the region is provided in Figure 4-2 and compared to that of non-migrating residents. The majority of the residents who moved into the region between 2006 and 2011 fell between the ages of 5 and 44 (62 per cent of inward migrating residents), whereas this age cohort accounts for 45 per cent of non-migrating AHFKI RDA region residents (Figure 4-2).

Figure 4-2 Age profile of in-bound AHFKI RDA region residents, 2011

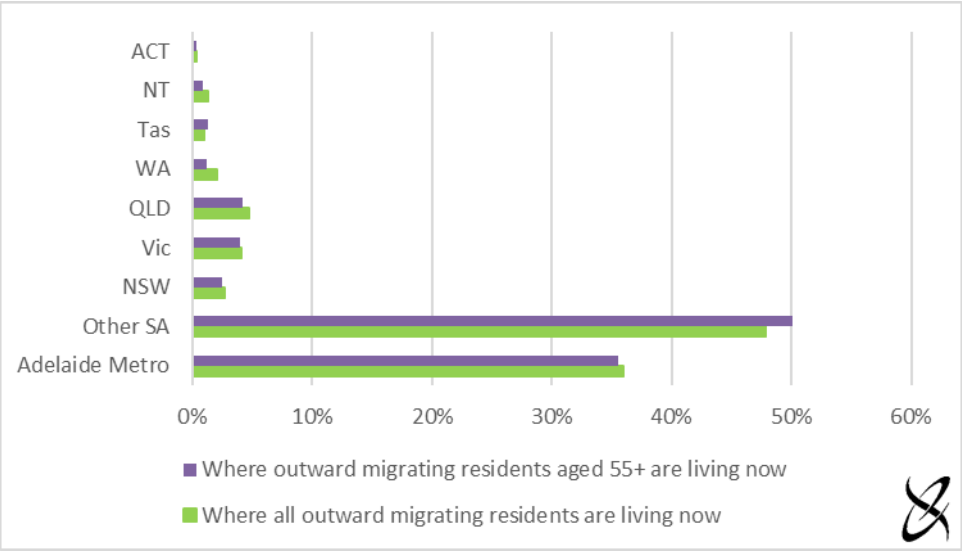


Source: ABS (2017e)

4.2 Out-Migration

As noted above, the majority of AHFKI RDA region residents (78 per cent) who were living in the AHFKI RDA region in 2006 are still living there (2011). Of those residents who moved out of the region (approximately 26,000 persons across all age groups) around 36 per cent moved to an Adelaide metropolitan Local Government Area (LGA), 48 per cent moved to other regions in SA and 16 per cent moved interstate (Figure 4-3). For the 55+ cohort, a larger proportion moved to other regions in SA and a small proportion moved interstate.

Figure 4-3 Where outward migrating residents were living in 2011 [a]

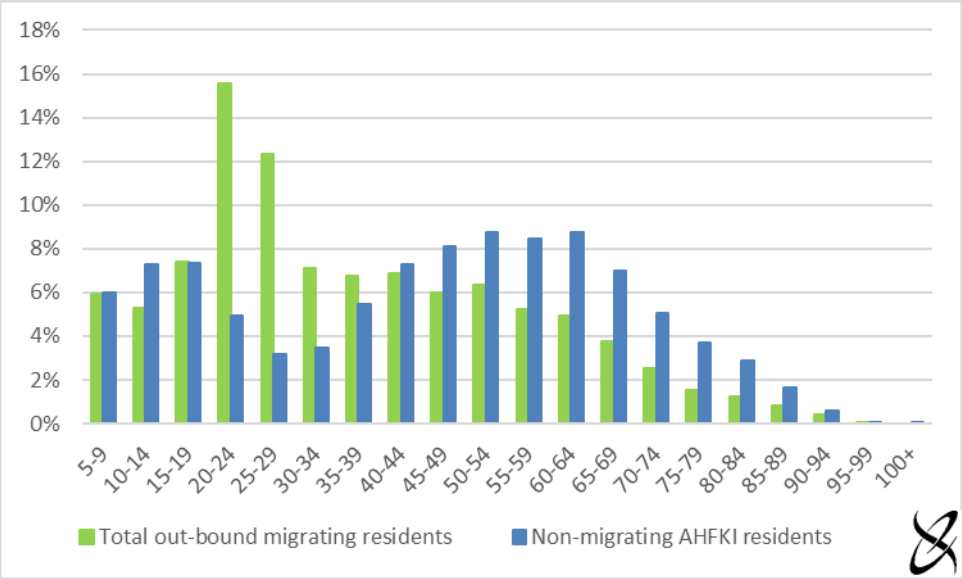


[a] Excludes those AHFKI RDA region residents who were living in the AHFKI RDA region 5 years ago.

Source: ABS (2017e)

The age profile of those residents who moved out of the region is provided in Figure 4-4. Almost three quarters of the residents who moved out of the region between 2006 and 2011 fell between the ages of 5 and 44 (74 per cent of outward migrating residents) whereas this age cohort accounts for just 67 per cent of non-migrating residents (Figure 4-4).

Figure 4-4 Age profile of out-bound AHFKI RDA region residents, 2011



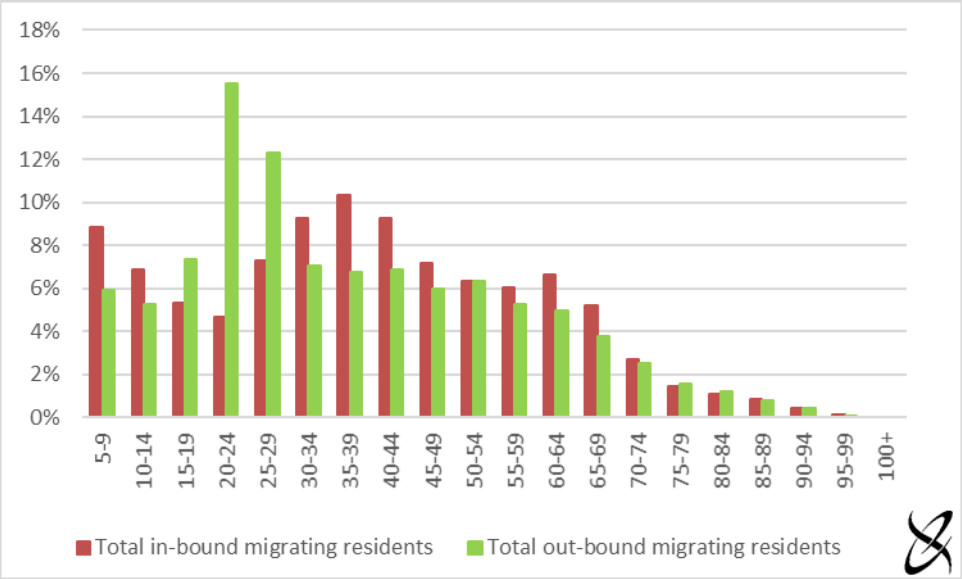
Source: ABS (2017e)

Two previous charts compared the age profile of non-migrating AHFKI RDA region residents with in-bound migrating residents (Figure 4-2) and out-bound migrating residents (Figure 4-4). Figure 4-5 compares the age profile of the in-bound and out-bound migrating residents. As noted earlier, between 2006 and 2011 the number of in-migrating residents (almost 37,000 persons) was well above the number of out-migrating residents (approximately 26,000 persons). The age profile of the two groups was also similar, but with some notable differences:

- The age group of 15-29 years comprised a larger proportion of out-bound migrating residents (35 per cent) than of in-bound migrating residents (17 per cent).
- By contrast, there was a greater proportion of in-bound migrating residents in all other age cohorts.

Clearly, a higher proportion of people aged between 15 and 29 left the AHFKI RDA region between 2006 and 2011 than moved into the region. It is not immediately clear why this is the case but initiatives to find out why people in this age group are leaving and what needs to be done to convince them to stay are likely to be important for future planning.

Figure 4-5 Age profile of in-bound and out-bound AHFKI RDA region residents, 2011



Source: ABS (2017e)

5. EDUCATION, EMPLOYMENT AND LABOUR FORCE

5.1 Education and Training

5.1.1 School students

Total enrolments for government and non-government schools located within the AHFKI RDA region and SA are detailed in Table 5-1 for the five census years 1996, 2001, 2006, 2011 and 2016. The total number of students enrolled in primary school in the AHFKI RDA region increased by 1 per cent between 1996 and 2016. This increase was comprised of a 9 per cent decrease in enrolments in government schools and a 31 per cent increase in enrolments at non-government schools.

Table 5-1 School enrolments in the AHFKI RDA region and SA, 1996, 2001, 2006, 2011 and 2016 (no. of persons)

	Census Year				
	1996	2001	2006	2011	2016
AHFKI RDA					
Pre-school	1,274	1,325	1,450	1,553	1,545
Primary					
- Government	8,876	8,868	8,005	7,684	8,073
- Non-Government	3,026	3,265	3,664	4,385	3,957
Total Primary Student	11,902	12,133	11,669	12,069	12,030
Secondary Students					
- Government	4,235	4,857	4,415	4,240	4,297
- Non-Government	1,978	2,473	3,231	3,530	3,838
Total Secondary Student	6,213	7,330	7,646	7,770	8,135
South Australia					
Pre-school	17,218	18,166	18,577	20,579	20,291
Primary					
- Government	112,199	103,630	93,512	87,779	94,524
- Non-Government	38,615	43,142	46,003	48,763	48,784
Total Primary Student	150,814	146,772	139,515	136,542	143,308
Secondary Students					
- Government	55,044	57,533	52,037	52,221	52,725
- Non-Government	27,665	31,557	35,259	38,731	40,535
Total Secondary Student	82,709	89,090	87,296	90,952	93,260

Source: ABS (2017e)

The total number of AHFKI RDA region students enrolled in secondary school increased by 31 per cent between 1996 and 2016. The increase was comprised of a 94 per cent increase in non-government school enrolments and a 1 per cent increase in government school enrolments.

Enrolments in non-government schools accounted for 39 per cent of total school enrolments in the AHFKI RDA region in 2016. In 1996 the proportion of enrolments in non-government schools was 28 per cent.

5.1.2 Tertiary enrolments

Enrolments at universities, technical colleges and other education institutes for five census years (1996, 2001, 2006, 2011 and 2016) are summarised in Table 5-2 for the AHFKI RDA region and South Australia. Between 1996 and 2016 the total number of AHFKI RDA region residents enrolled in a higher education institute increased by 75 per cent. This is a significantly greater increase than for SA as a whole where the total number of residents undertaking higher education increased by 50 per cent.

Table 5-2 Higher education enrolments for the AHFKI RDA region and South Australia, 1996, 2001, 2006, 2011 and 2016[a] (no. of persons)

	AHFKI RDA					South Australia				
	1996	2001	2006	2011	2016	1996	2001	2006	2011	2016
TAFE										
Full-time students	439	525	482	622	592	8,743	10,616	9,581	12,075	12,017
Part-time students	1,629	1,925	1,800	1,755	1,448	25,333	25,896	22,725	22,374	19,124
Not Stated	6	7	32	12	14	255	227	441	390	257
Total	2,074	2,457	2,314	2,389	2,054	34,331	36,739	32,747	34,839	31,398
University										
Full-time students	1,456	1,641	1,784	2,417	2,657	29,712	31,303	37,104	47,223	58,559
Part-time students	1,260	1,323	1,249	1,437	1,464	17,283	17,528	16,309	18,387	19,923
Not Stated	4	3	20	14	23	158	164	313	354	298
Total	2,720	2,967	3,053	3,868	4,144	47,153	48,995	53,726	65,964	78,780
Other										
Full-time students	108	137	125	173	172	2,282	2,675	2,654	3,469	4,042
Part-time students	298	555	520	550	447	4,455	7,796	6,842	7,380	7,273
Not Stated	13	21	13	11	3	109	188	245	246	187
Total	419	713	658	734	622	6,846	10,659	9,741	11,095	11,502
Institute type and/or status not stated	3,538	3,376	7,420	6,117	8,475	63,526	52,718	105,797	98,693	106,439
Total	8,751	9,513	13,445	13,108	15,295	151,856	149,111	202,011	210,591	228,119

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

Source: ABS (2017e)

5.1.3 Qualifications

The level of qualification held by residents in the AHFKI RDA region and SA are detailed in Table 5-3, for the years 1996, 2001, 2006 and 2011.

The total number of residents in the AHFKI RDA region with a non-school qualification increased steadily over the four Census years. In 2011, approximately 56 per cent of all persons aged 15 or over in the AHFKI RDA region held some form of non-school qualification (increasing from 43 per cent in 1996). The level of qualification was generally higher for the AHFKI RDA region than for SA where the number of persons aged 15 and over holding some form of non-school qualification in SA was 45 per cent in 2011 and 39 per cent in 1996.

Table 5-3 Highest level of qualifications for persons aged 15 and over in the AHFKI RDA region and SA, 1996, 2001, 2006 and 2011

Qualification	AHFKI RDA							
	1996		2001		2006		2011	
Postgraduate Degree	1,050	3%	1,410	4%	2,121	4%	3,054	5%
Graduate Diploma & Graduate Certificate	1,239	4%	1,384	4%	1,685	3%	2,091	4%
Bachelor Degree	5,580	17%	7,992	21%	10,060	20%	12,545	22%
Advanced Diploma & Diploma	5,450	17%	5,811	15%	7,574	15%	9,440	16%
Certificate:								
Certificate Level, nfd(b)	n.a.	-	1,897	5%	1,953	4%	2,034	4%
Certificate III & IV	8,404	26%	10,745	28%	14,527	29%	17,856	31%
Certificate I & II	2,624	8%	1,803	5%	1,125	2%	1,441	3%
Level of education not described	700	2%	1,189	3%	1,490	3%	1,230	2%
Level of education not stated	6,973	22%	6,564	17%	9,048	18%	7,643	13%
Total	32,020	100%	38,795	100%	49,583	100%	57,334	100%
	South Australia							
	1996		2001		2006		2011	
Postgraduate Degree	11,790	3%	15,203	3%	22,897	4%	35,999	5%
Graduate Diploma & Graduate Certificate	12,680	3%	14,361	3%	16,098	3%	20,277	3%
Bachelor Degree	73,761	17%	95,812	20%	120,979	20%	152,185	22%
Advanced Diploma & Diploma	64,328	15%	63,469	13%	79,698	13%	95,689	14%
Certificate:								
Certificate Level, nfd(b)	n.a.	-	5,775	1%	21,172	4%	21,518	3%
Certificate III & IV	120,797	27%	155,056	32%	176,066	30%	205,850	30%
Certificate I & II	35,905	8%	24,298	5%	15,343	3%	18,387	3%
Level of education not described	8,447	2%	14,999	3%	15,940	3%	13,792	2%
Level of education not stated	112,132	25%	100,201	20%	127,186	21%	116,517	17%
Total	439,840	100%	489,174	100%	595,379	100%	680,214	100%

Source: ABS (2017e)

5.2 Employment and Labour force

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

- labour force[4]
- number of unemployed persons
- unemployment rate[5]
- participation rate[6]
- place of work by usual residence.

5.2.1 Labour force

The total number of persons in the labour force is illustrated for the AHFKI RDA region and SA in Figure 5-1 and for the AHFKI RDA region by LGA in Figure 5-2, for the period 2008 to 2017 (March quarter).

The total number of persons in the labour force in the AHFKI RDA region fluctuated over the years 2008 to 2017 ranging from a low of 62,481 in March 2008 to a high of 70,953 in March 2017. Despite some fluctuations, the labour force in SA increased over the 8 years from 803,000 in March 2008 to 873,000 in March 2017 (Figure 5-1).

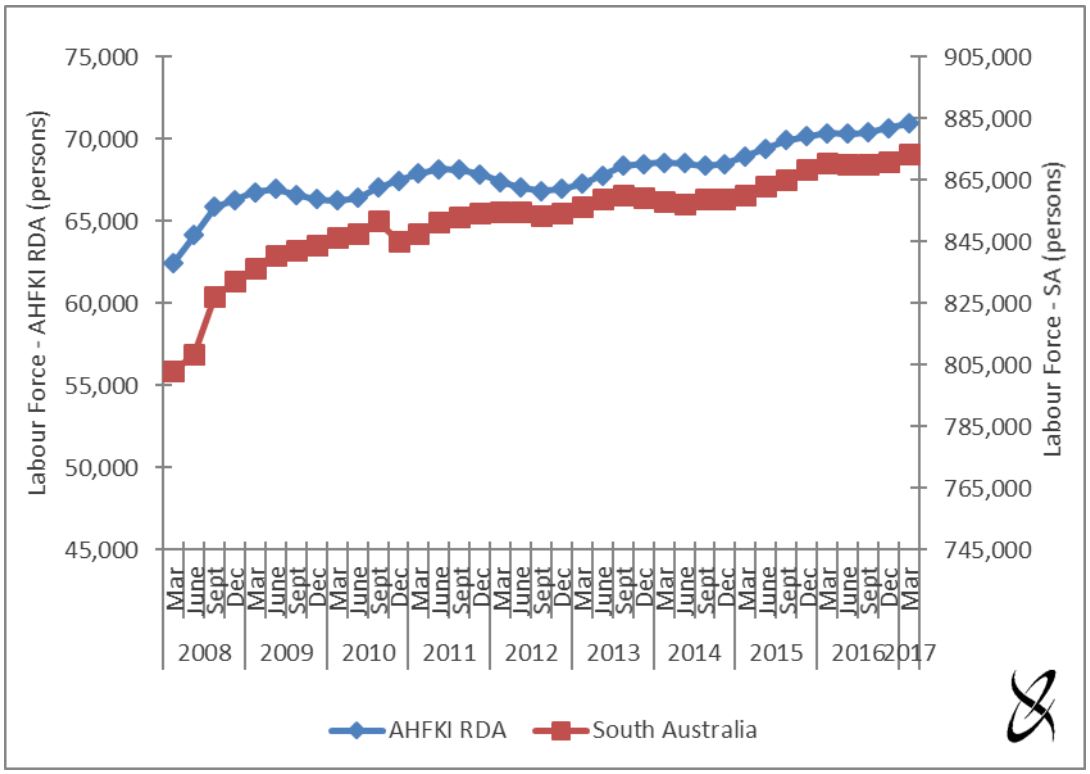
Overall the labour force in the AHFKI RDA region increased by 14 per cent between 2008 and 2017 (March quarter). This increase reflects 30 per cent labour force growth in Alexandrina, 29 per cent in Victor Harbor, 28 per cent growth in Mount Barker, 17 per cent growth in Yankalilla, 6 per cent growth on KI, 2 per cent growth in the McLaren Vale District and a 1 per cent decline in the Adelaide Hills (Figure 5-2).

[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.

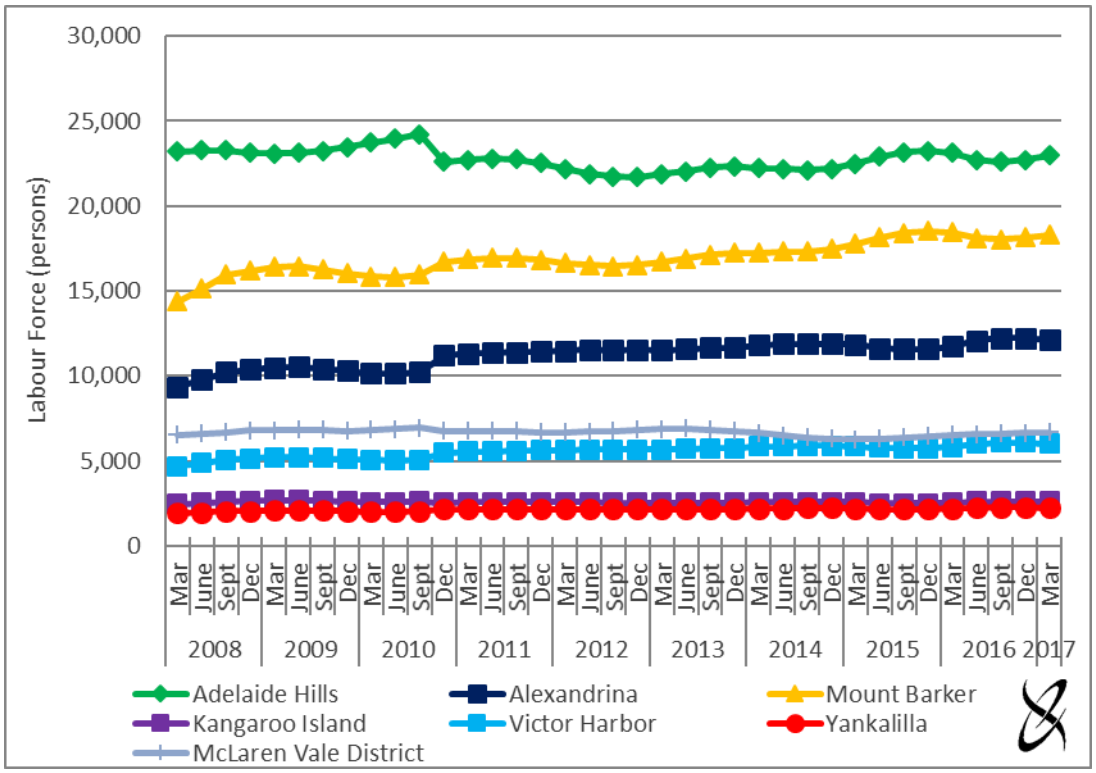
[6] The participation rate is a measure of the total labour force as a proportion of the civilian population (persons aged 15 and over) (ABS 2007).

Figure 5-1 Labour force in the AHFKI RDA region and SA, 2008 to 2017 (March quarter)



Source: DE (2017)

Figure 5-2 Labour force in the AHFKI RDA region by LGA, 2008 to 2017 (March quarter)



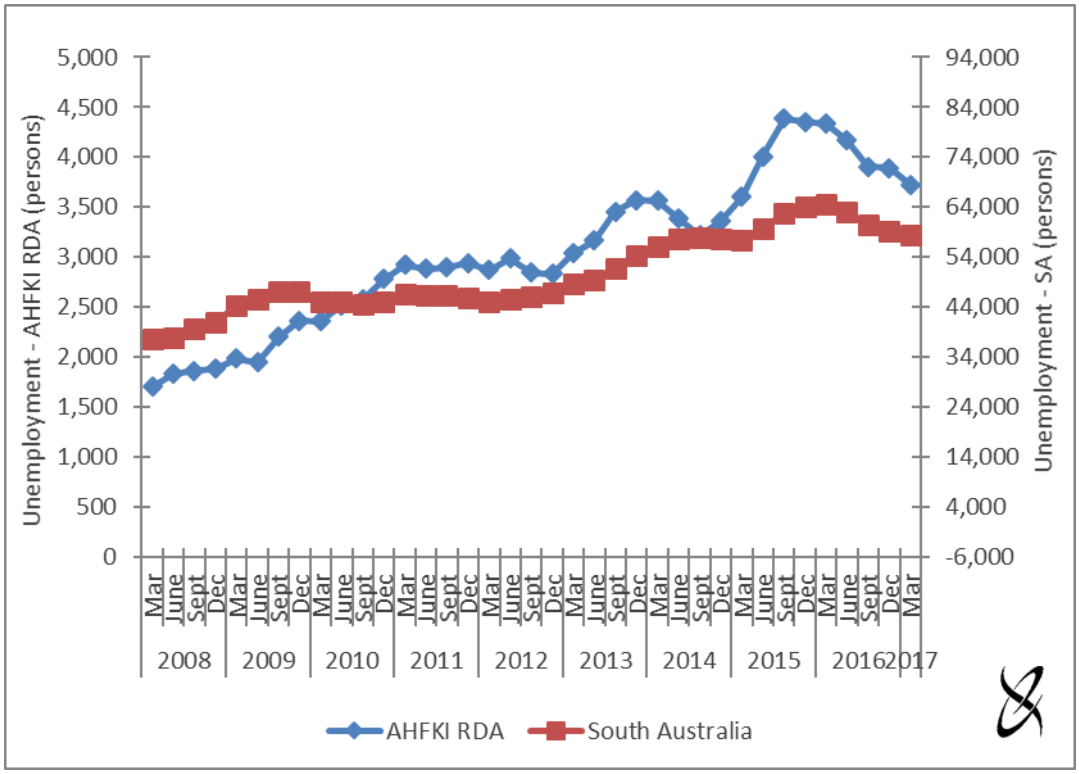
Source: DE (2017)

5.2.2 Unemployment

The number of unemployed persons is illustrated for the AHFKI RDA region and SA in Figure 5-3 and for the AHFKI RDA region by LGA in Figure 5-4, for the period 2008 to 2017 (March quarter). The number of unemployed persons in the AHFKI RDA region fluctuated over the period 2008 to 2017 (March quarter) but followed an increasing trend overall. The total number of unemployed persons in the region ranged between 1,705 in March 2008 and 3,725 in March 2017, an increase of 2,020 persons (approximately 118 per cent) in the AHFKI RDA region. The number of unemployed persons in SA also increased, by almost 21,000 persons (55 per cent) (Figure 5-3).

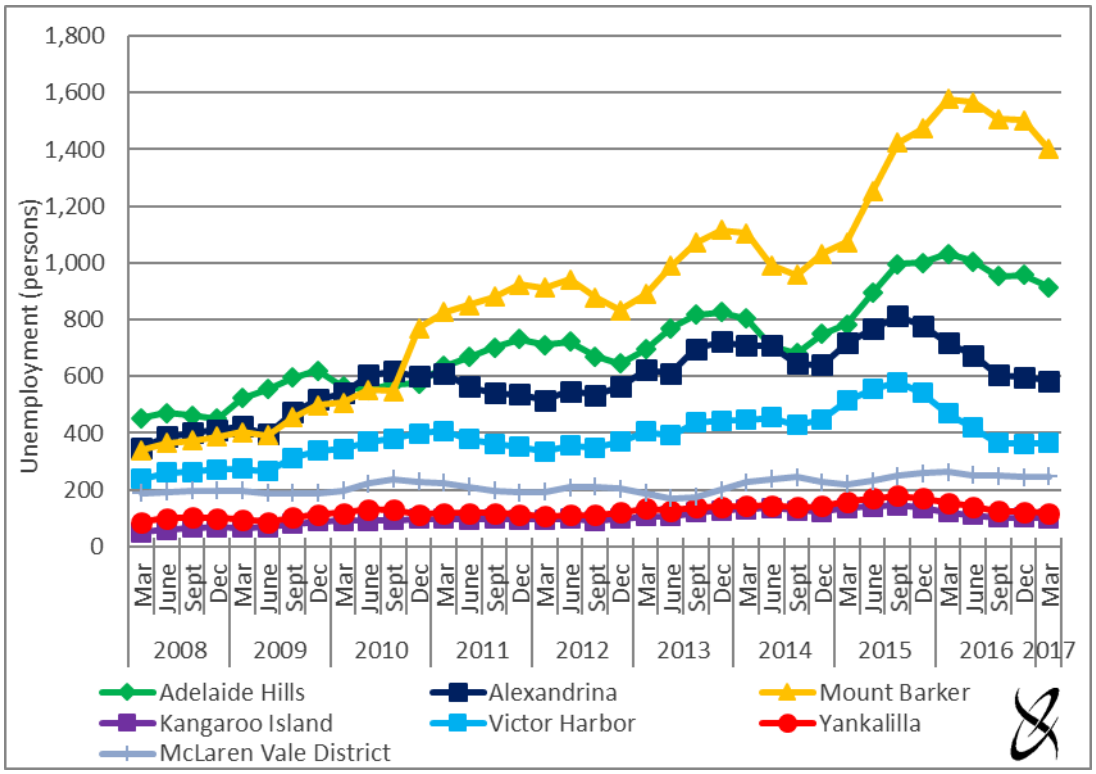
Overall the number of unemployed persons in the AHFKI RDA region increased by 118 per cent between 2008 and 2017 (March quarter). This comprises an increase in the number of persons unemployed of 312 per cent in Mount Barker, 102 per cent in the Adelaide Hills, 98 per cent on KI, 67 per cent in Alexandrina, 53 per cent in Victor Harbor, 34 per cent in Yankalilla and 31 per cent in the McLaren Vale District (Figure 5-4).

Figure 5-3 Unemployed persons in the AHFKI RDA region and SA, 2008 to 2017 (March quarter)



Source: DE (2017)

Figure 5-4 Unemployed persons in the AHFKI RDA region by LGA, 2008 to 2017 (March quarter)



Source: DE (2017)

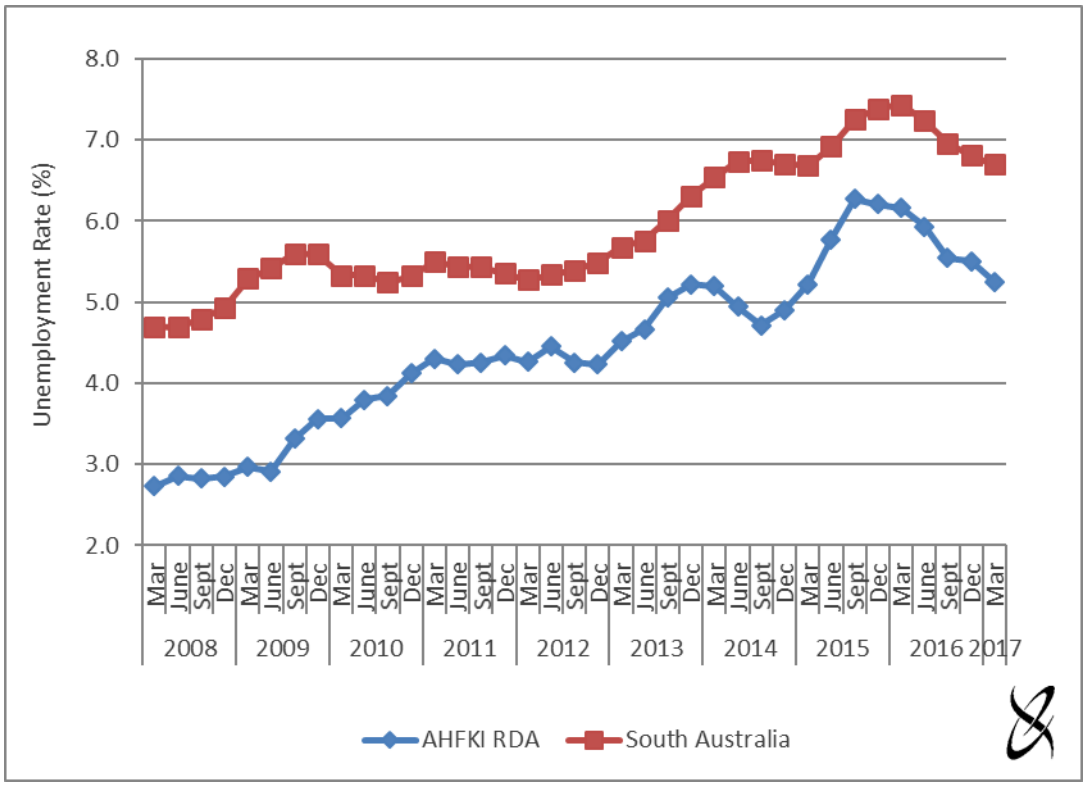
5.2.3 Unemployment rate

The unemployment rates are illustrated for the AHFKI RDA region and SA in Figure 5-5 and for the AHFKI RDA region by LGA in Figure 5-6, for the period 2008 to 2017 (March quarter).

The unemployment rate in the AHFKI RDA region increased over the period 2008 to 2017 and was estimated to be 5.2 per cent in March 2017 (Figure 5-5). The unemployment rate in the AHFKI RDA region was, on average, lower than the unemployment rate for SA (6.7 per cent in March 2017) over the same period.

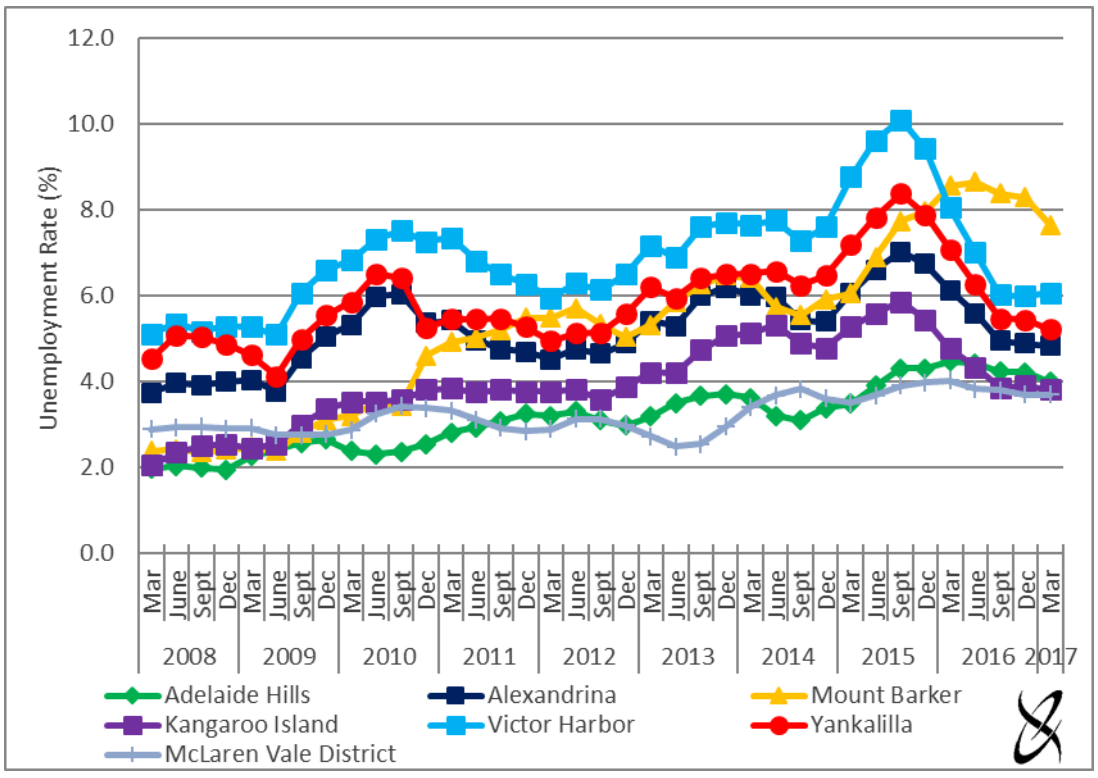
The unemployment rate in each of the LGAs in the AHFKI RDA region increased over the period 2008 to 2017 (March quarter). In March 2017, the unemployment rates for the component LGAs were 3.7 per cent in the McLaren Vale District, 3.8 per cent on KI, 4.0 per cent in the Adelaide Hills, 4.8 per cent in Alexandrina, 5.2 per cent in Yankalilla, 6.1 per cent in Victor Harbor and 7.6 per cent in Mount Barker (Figure 5-6).

Figure 5-5 Unemployment rate in the AHFKI RDA region and SA, 2008 to 2017 (March quarter)



Source: DE (2017) and EconSearch analysis

Figure 5-6 Unemployment rate in the AHFKI RDA region by LGA, 2008 to 2017 (March quarter)



Source: DE (2017) and EconSearch analysis

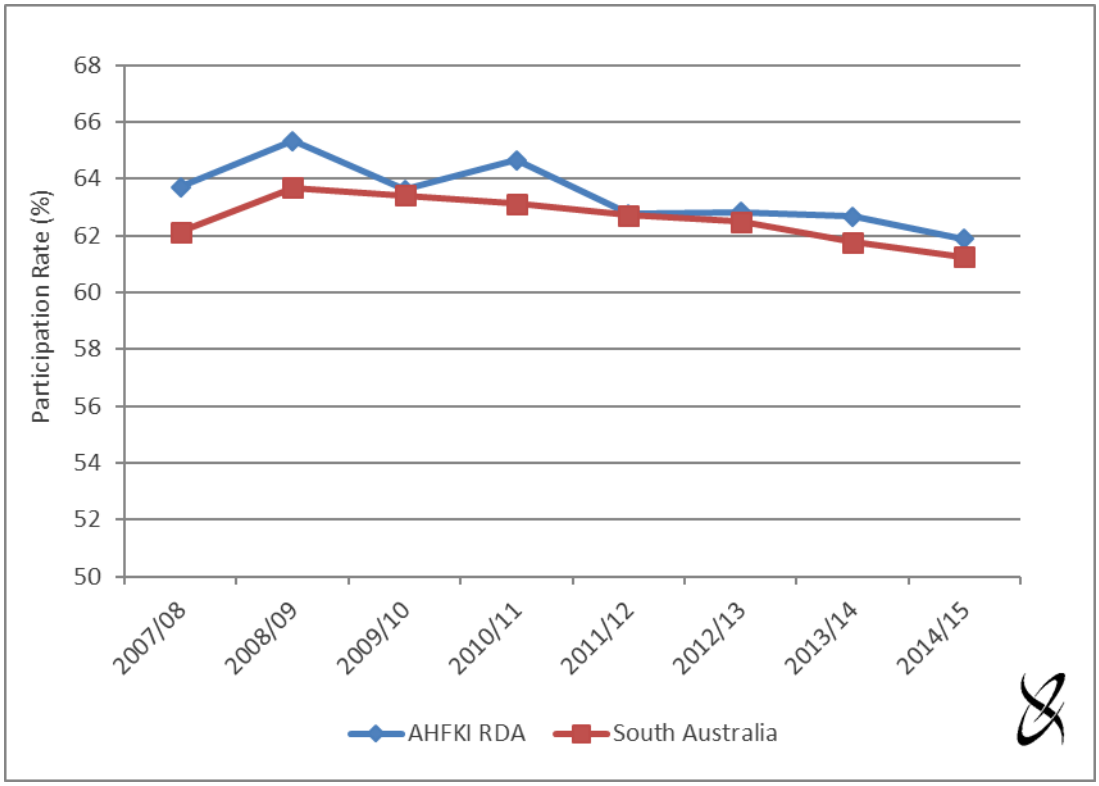
5.2.4 Participation rate

The participation rate is illustrated for the AHFKI RDA region and SA in Figure 5-7 and for the AHFKI RDA region by LGA in Figure 5-8, for the period 2007/08 to 2014/15[7].

The labour force participation rate for the AHFKI RDA region decreased slightly over the eight years (2007/08 to 2014/15), from 63.7 per cent in 2007/08 to 61.9 per cent in 2014/15. The labour force participation rate in SA also decreased slightly, from 62.1 in 2007/08 to 61.2 per cent in 2014/15. Over the eight year period the participation rate for the AHFKI RDA region was on average higher than for SA as a whole (Figure 5-7).

In the AHFKI RDA region the labour force participation rate in 2014/15 was highest in the Adelaide Hills LGA where it was 70.8 per cent and lowest in the Victor Harbor LGA where it was 43.3 per cent (Figure 5-8).

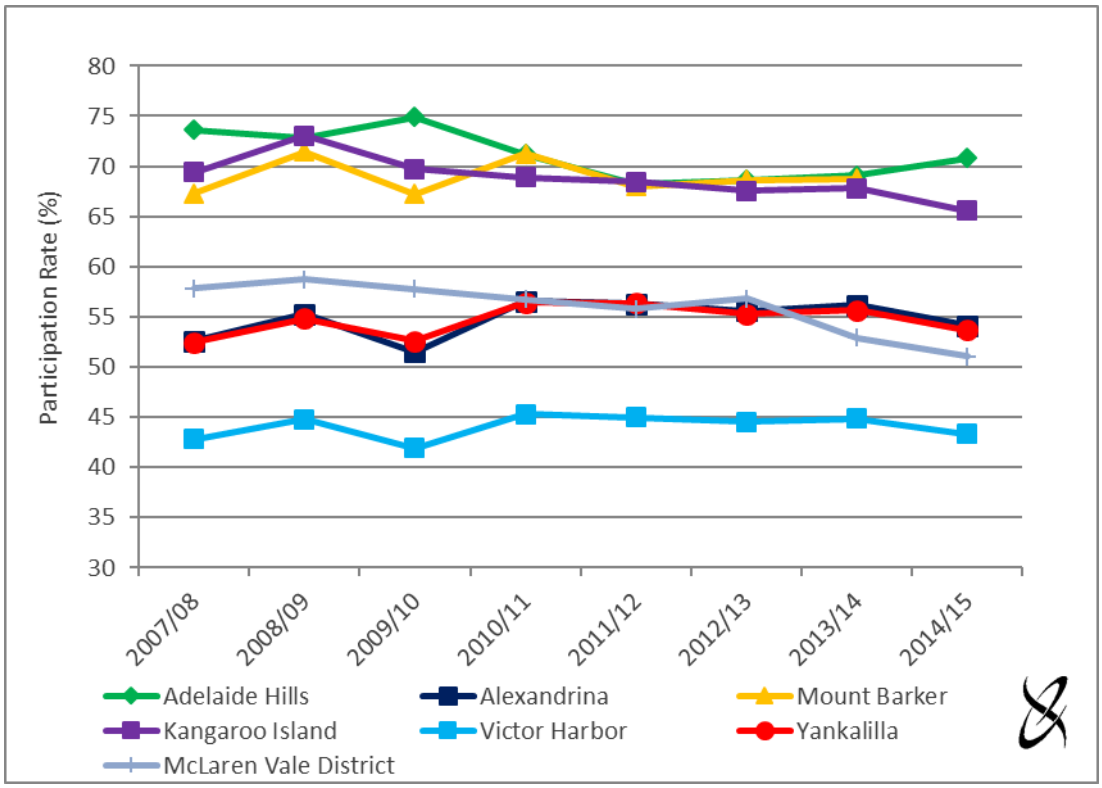
Figure 5-7 Participation rate in the AHFKI RDA region and SA, 2007/08 to 2014/15



Source: DE (2017), ABS (2016a) and EconSearch analysis

[7] Whilst employment data (DE 2017) is available for March quarter 2017 the most recently published population by age data (ABS 2016a) is for 2014/15, which limits the estimation of the participation rate to 2014/15.

Figure 5-8 Participation rate in the AHFKI RDA region by LGA, 2007/08 to 2014/15

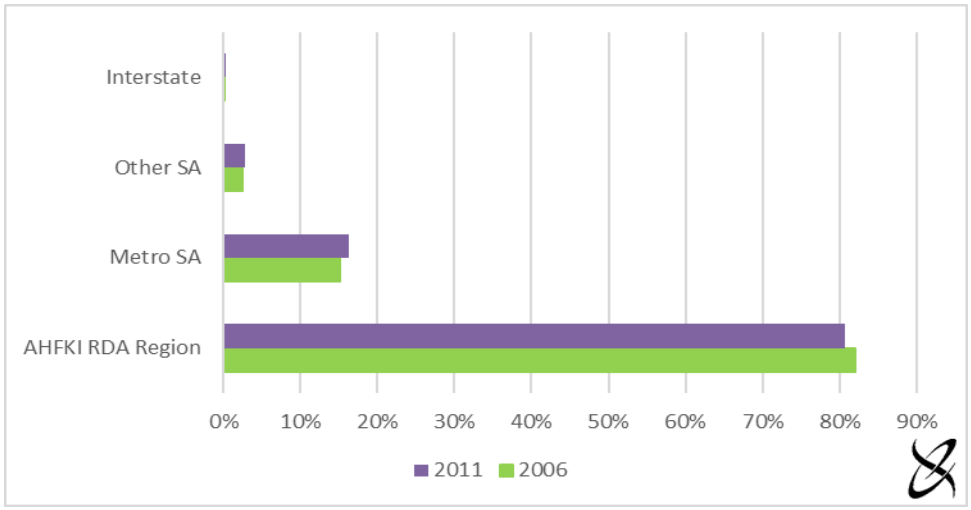


Source: DE (2017), ABS (2016a) and EconSearch analysis

5.2.5 Place of work by usual residence

In order to determine the non-resident population, ABS Census data have been sourced for 2011 and 2006 on the number of people who work in the AHKFI RDA region and where they live (shown in Figure 5-9). The majority of people who work in the AHFKI RDA region live in the AHFKI RDA region (82 per cent in 2006 and 81 per cent in 2011). Of the remaining people who work in the AHFKI RDA region, 16 per cent live in a metropolitan LGA and the remainder (3 per cent) live in another regional LGA (Figure 5-9).

Figure 5-9 Place of work, AHFKI RDA region, by usual residence, 2006 and 2011



Source: ABS (2017e)

6. INCOME AND HOUSING

6.1 Household Income

This section provides information on average annual income relevant to the AHFKI RDA region and SA. The proportion of taxable individuals and the mean taxable income are presented in Table 6-1 for the AHFKI RDA region and SA, for the period 2000/01 to 2014/15.

The proportion of taxable individuals[8] (compared to non-taxable individuals[9]) in the AHFKI RDA region decreased from 78 per cent in 2000/01 to 72 per cent in 2014/15. In the 2014/15, there were almost 60,000 taxable and 23,000 non-taxable individuals in the AHFKI RDA region. Despite a decrease over the 13 years (from 81 per cent to 75 per cent), the proportion of taxable individuals in SA as a whole was greater than the AHFKI RDA region in all years.

The mean individual taxable incomes in the AHFKI RDA region and SA for the period 2000/01 to 2014/15 are illustrated in Figure 6-1 (nominal terms) and Figure 6-3 (real terms). 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 2017b). It enables meaningful comparisons of incomes to be made between years. Over the same period, the mean individual taxable incomes in the AHFKI RDA region by LGA are illustrated in nominal and real terms in Figure 6-2 and Figure 6-4, respectively.

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 AHFKI RDA region was lower than the state average over the whole period, in both nominal and real terms. In the AHFKI RDA region the mean individual taxable income increased in nominal terms from around $31,000 in 2000/01 to $60,000 in 2014/15. For SA the mean individual taxable income (in nominal terms) increased steadily over the 10 years from around $35,000 in 2000/01 to approximately $65,000 in 2014/15 (Table 6-1 and Figure 6-1).

[8] Refers to personal taxpayers who submitted a return with net tax payable of more than $0.

[9] An individual is considered non-taxable when the net tax payable by the individual is equal to $0.

Table 6-1 Taxable individuals and taxable income in the AHFKI RDA region and SA, 2000/01 to 2014/15

	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
AHFKI RDA															
Proportion of taxable individuals (%) [a]	78%	78%	79%	79%	79%	80%	76%	76%	72%	70%	71%	73%	70%	72%	72%
Mean taxable income - nominal ($) [b]	31,364	32,282	33,617	35,260	37,157	38,375	42,300	44,549	47,446	49,993	52,892	53,908	58,136	59,796	60,099
Mean taxable income - real ($) [c]	31,364	31,387	31,479	32,078	33,068	32,919	35,661	35,913	37,670	38,610	39,322	39,597	41,826	41,716	41,417
South Australia															
Proportion of taxable individuals (%) [a]	81%	81%	81%	81%	81%	82%	79%	78%	75%	74%	74%	77%	74%	75%	75%
Mean taxable income - nominal ($') [b]	35,256	36,406	37,857	39,644	41,513	42,778	46,643	48,669	51,932	54,349	57,448	58,933	63,048	64,808	65,248
Mean taxable income - real ($) [c]	35,256	35,396	35,449	36,067	36,945	36,696	39,323	39,234	41,232	41,974	42,709	43,288	45,360	45,212	44,965

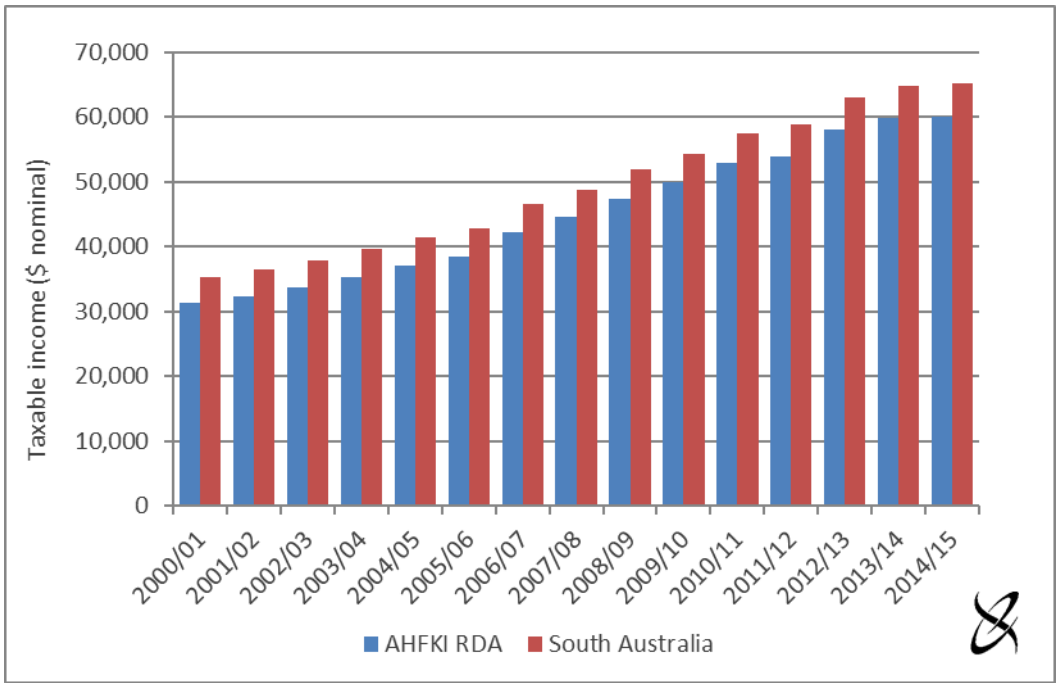
[a] Refers to personal taxpayers who submitted a return with net tax payable of more than $0.

[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.

[a] 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 2017b). It enables meaningful comparisons of incomes to be made between years.

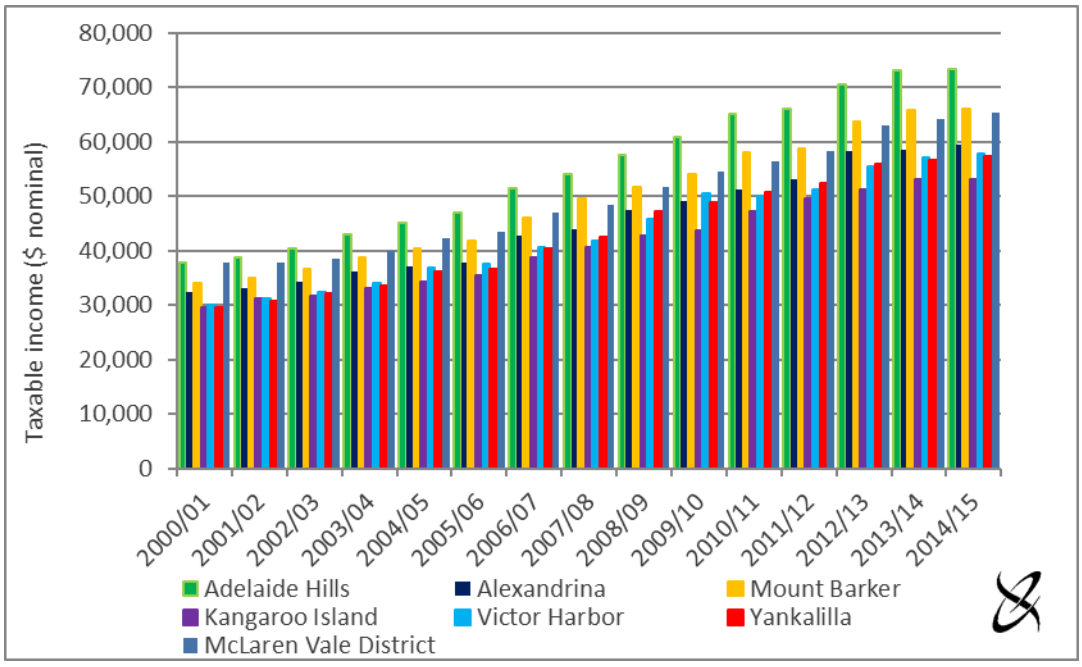
Source: ATO (2017) and ABS (2017b)

Figure 6-1 Nominal mean individual taxable income in the AHFKI RDA region and SA, 2000/01 to 2014/15



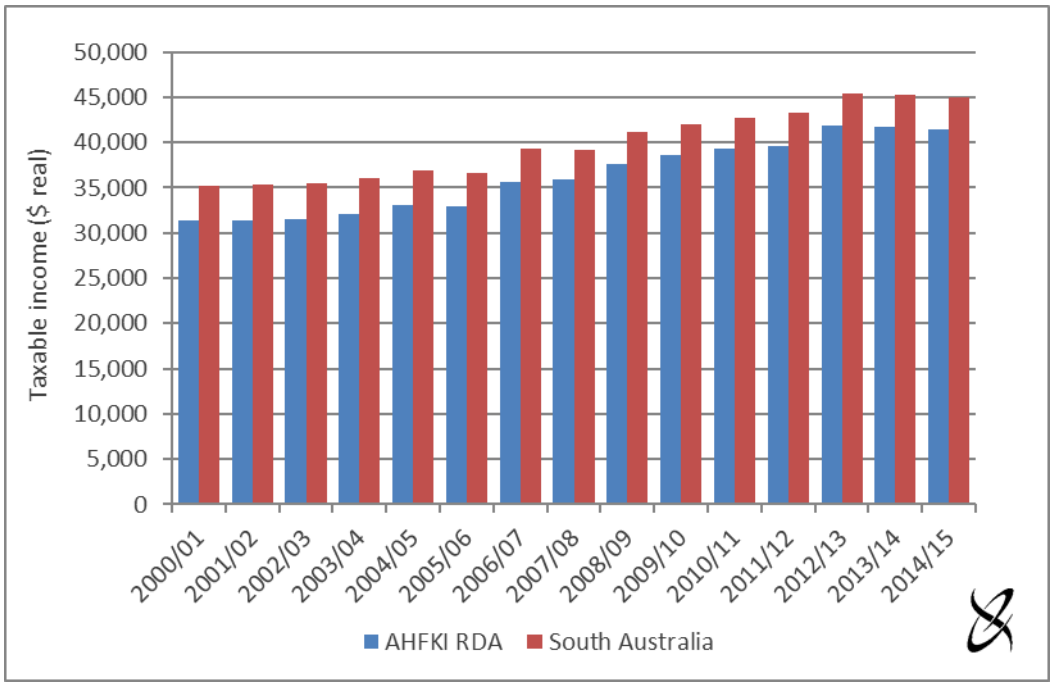
Source: ATO (2017)

Figure 6-2 Nominal mean individual taxable income in the AHFKI RDA region by LGA, 2000/01 to 2014/15



Source: ATO (2017)

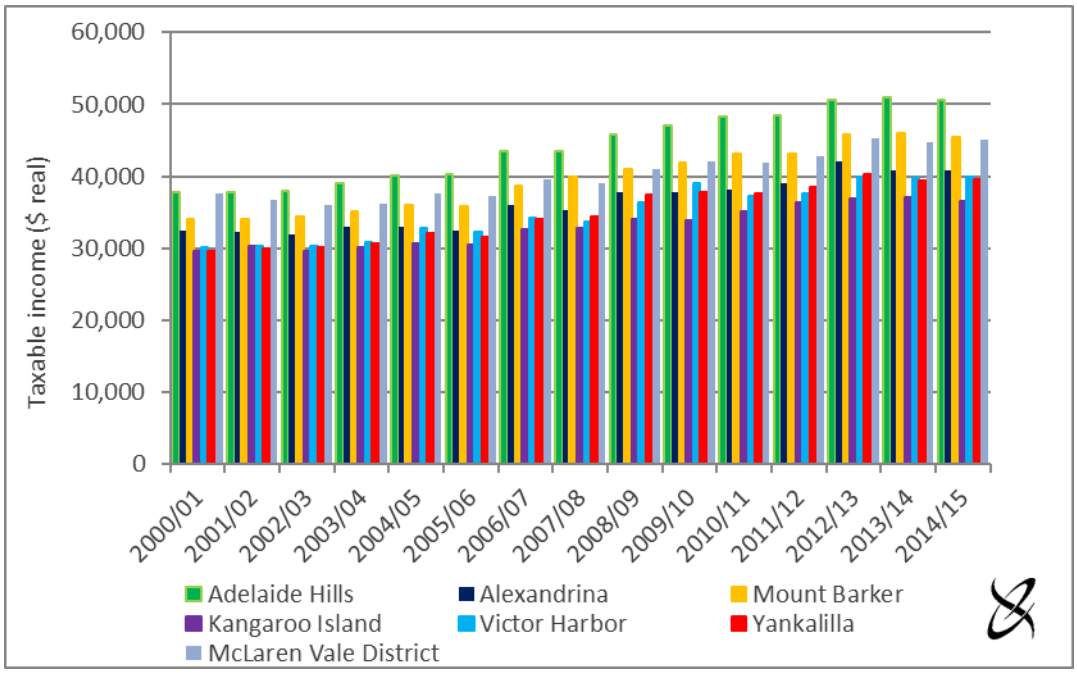
Figure 6-3 Real mean individual taxable income in the AHFKI RDA region and SA, 2000/01 to 2014/15 [a]



[a] In 2000/01 dollars.

Source: ATO (2017) and ABS (2017b)

Figure 6-4 Real mean individual taxable income in the AHFKI RDA region by LGA, 2000/01 to 2014/15 [a]



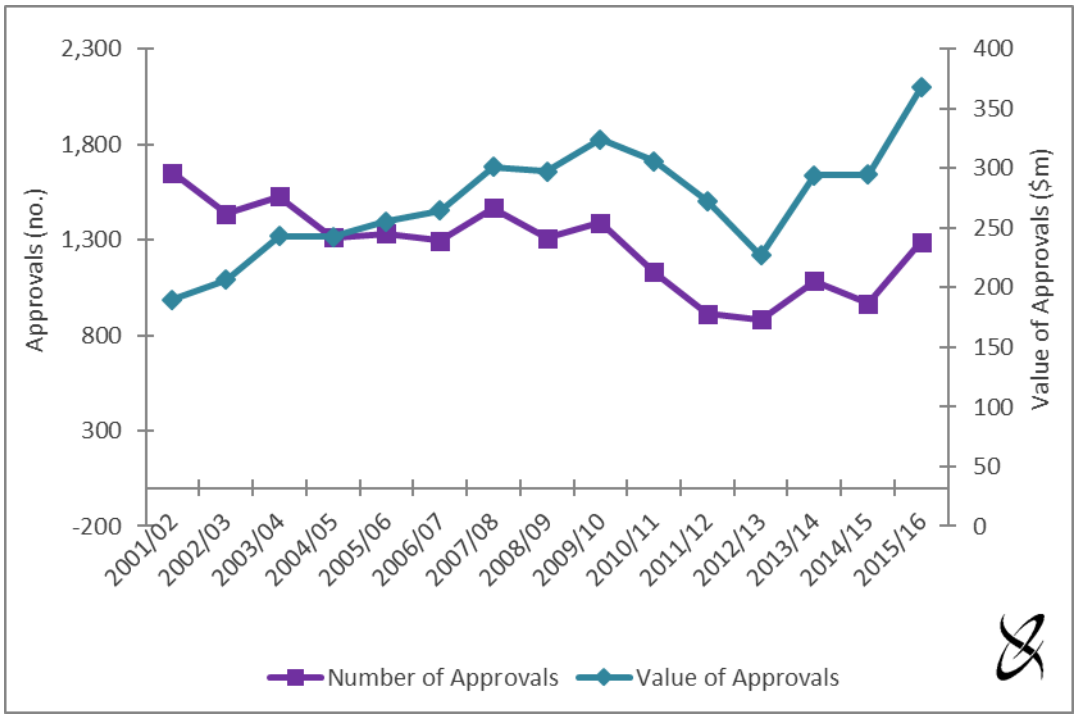
[a] In 2000/01 dollars.

Source: ATO (2017) and ABS (2017b)

6.2 Building Approvals

This section provides the number and value of approvals for new residential dwellings in the AHFKI RDA region and SA. The number and total value of approvals in the AHFKI RDA region and SA are illustrated in Figure 6-5 and Figure 6-6 respectively for the period 2001/02 to 2015/16.

Figure 6-5 Number and value of new residential dwelling approvals in the AHFKI RDA region, 2001/02 to 2015/16



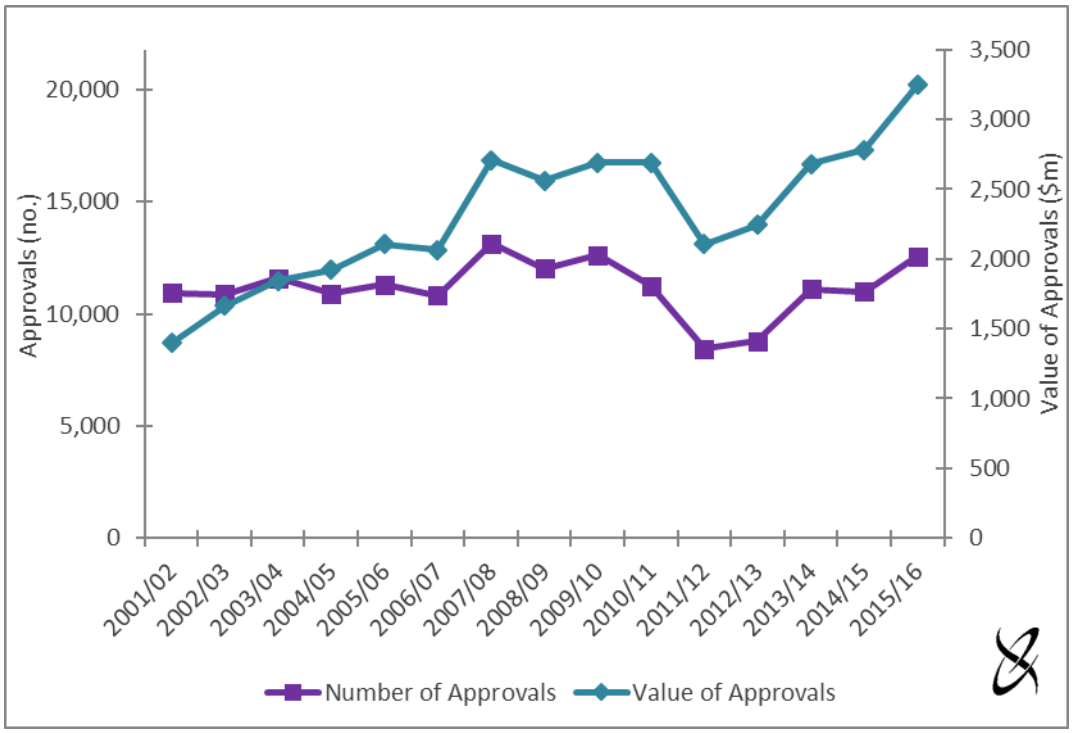
Source: ABS (2017c)

The total number of building approvals in the AHFKI RDA region decreased overall from 1,650 in 2001/02 to 1,289 in 2015/16, a fall of 22 per cent. Despite this fall, the total value of approvals increased over the same period, from $190 million in 2001/02 to $368 million in 2015/16, an increase of 94 per cent (Figure 6-5).

Comparison of the two end years (2001/02 and 2015/16) highlights the significant increase in the value of building approvals in SA. Despite the total number of approvals being only 15 per cent higher in 2015/16 than in 2001/02, the total value was 132 per cent higher (Figure 6-6).

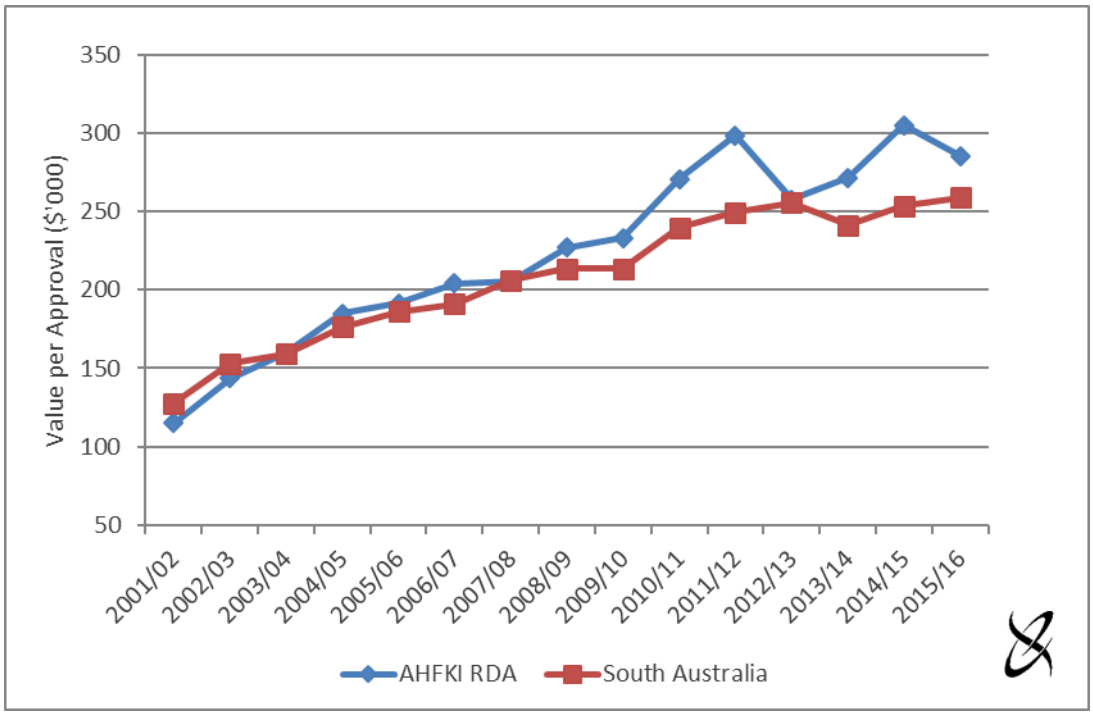
The average value per approval in the AHFKI RDA region and SA is illustrated in Figure 6-7 and for the AHFKI RDA region by LGA in Figure 6-8. The average value per approval in the AHFKI RDA region more than doubled between 2001/02 and 2015/16 from $115,000 to $285,000 (148 per cent). For SA, the value per approval increased from $128,000 in 2001/02 to $259,000 in 2015/16, an increase of 102 per cent (Figure 6-7).

Figure 6-6 Number and value of new residential dwelling approvals in SA, 2001/02 to 2015/16



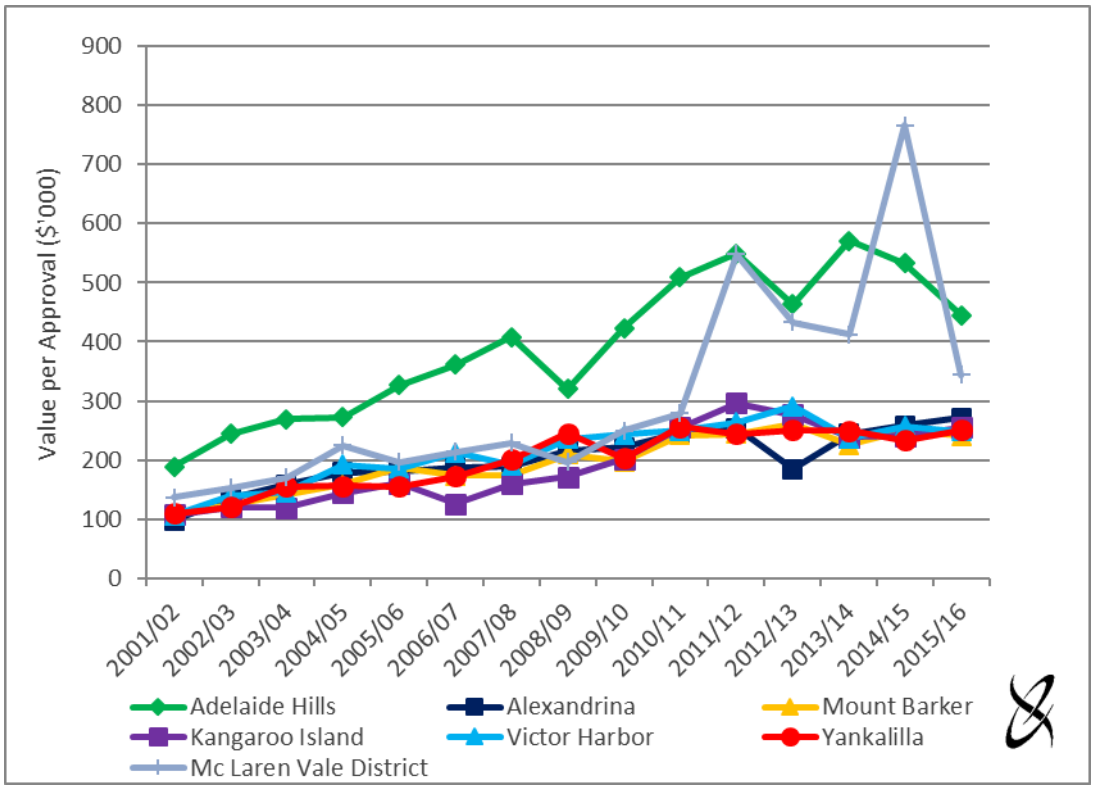
Source: ABS (2017c)

Figure 6-7 Average value per approval in the AHFKI RDA region and SA, 2001/02 to 2015/16



Source: ABS (2017c)

Figure 6-8 Average value per approval in the AHFKI RDA region by LGA, 2001/02 to 2015/16



Source: ABS (2017a)

6.3 Housing Affordability

An indicator of housing affordability was estimated using ABS Census data on mortgage repayments, rent and income (ABS 2017e). A measure of housing cost was estimated using a weighted average of rental payments and mortgage payments. Housing affordability was then estimated as housing cost as a proportion of income. Detailed below are the housing affordability estimates for the LGAs within the AHFKI RDA region:

- Adelaide Hills – 21 per cent
- Alexandrina – 30 per cent
- Kangaroo Island – 26 per cent
- McLaren Vale District – 26 per cent
- Mount Barker – 32 per cent
- Victor Harbor – 32 per cent
- Yankalilla – 38 per cent.

Using these estimates, housing was most affordable in the Adelaide Hills LGA and least affordable in the Yankalilla LGA. For the AHFKI RDA region housing affordability was estimated to be 28 per cent, slightly less affordable than the state as a whole (26 per cent).

6.4 Internet Access

The number of dwellings with internet access for the three latest census years (2006, 2011 and 2016) are summarised in Table 6-2 for the AHFKI RDA region and South Australia. Between 2006 and 2016 the total number of AHFKI RDA region dwellings with internet access (broadband, dial-up or other) increased by 58 per cent. For SA as a whole the total number of dwellings with access to some form of internet increased by 57 per cent. The number of dwellings with no internet access in the AHFKI RDA region fell by 54 per cent between 2006 and 2016. This was similar to the State as a whole (54 per cent) (Table 6-2).

In 2016, only 13 per cent of dwellings in the AHFKI region had no access to any form of internet compared to 17 per cent for SA as a whole. In the AHFKI RDA region the proportion of dwellings with no internet access was highest in the Victor Harbor LGA where it was 19 per cent and lowest in the Adelaide Hills LGA where it was 9 per cent.

Table 6-2 Dwellings with internet access in the AHFKI RDA region and SA, 2006, 2011 and 2016

Internet Access	AHFKI RDA					
	2006		2011		2016	
Internet accessed from dwelling	27,328	61%	37,452	76%	43,300	81%
Internet not accessed from dwelling	15,149	34%	9,547	19%	7,039	13%
Not stated	2,514	6%	2,432	5%	2,978	6%
Total	44,991	100%	49,431	100%	53,317	100%
	SA					
	2006		2011		2016	
Internet accessed from dwelling	331,645	54%	457,873	71%	520,911	77%
Internet not accessed from dwelling	240,773	39%	147,996	23%	111,332	17%
Not stated	37,489	6%	38,025	6%	41,296	6%
Total	609,907	100%	643,894	100%	673,539	100%

Source: ABS (2017e)

6.5 NBN Coverage

The NBN Co has published a list of postcodes where NBN services are available, building has commenced or preparation for building has commenced (NBN Co 2017). Assuming the NBN coverage is for the entirety of the postcode published, then 86 per cent of the AHFKI RDA region by area has or will have in the near future NBN coverage. The coverage by LGA is as follows:

- 43 per cent in the Adelaide Hills
- 92 per cent in Alexandrina
- 100 per cent on KI
- 62 per cent in Mount Barker

- 100 per cent in Victor Harbor
- 77 per cent in Yankalilla
- 57 per cent in the McLaren Vale District.

7. HEALTH AND WELLBEING

7.1 Health

To provide some indication of the health and wellbeing of the AHFKI RDA region compared to the state as a whole, the proportion of people with health risk factors is presented in Table 7-1 and the rate of GP services in Table 7-2. These data were sourced from the Social Health Atlas of Australia (PHIDU 2017) [10].

The proportion of the population with health risk factors (smoking, harmful use of alcohol, overweight and obesity) was similar SA as a whole, except the AHFKI RDA region has a slightly lower number of people who smoke (9 per cent compared to 11 per cent for SA as a whole), are overweight (25 per cent compared to 27 per cent for SA), are obese (21 per cent compared to 23 per cent for SA) and a slightly higher proportion of people who consume harmful levels of alcohol (15 per cent compared to 13 per cent for SA) (Table 7-1).

Table 7-1 People with health risk factors in the AHFKI RDA region and SA, 2014/15

	Estimated population, aged 18 years and over, who were current smokers		Estimated population, aged 18 years and over, consuming alcohol at levels considered to be a high risk to health		Estimated population, aged 18 years and over, who were overweight (but not obese)		Estimated population, aged 18 years and over, who were obese	
	No.	% of Population	No.	% of Population	No.	% of Population	No.	% of Population
AHFKI RDA Region								
Adelaide Hills	2,981	7%	6,730	17%	11,615	29%	7,675	19%
Alexandrina	2,841	11%	3,954	16%	6,675	26%	6,933	27%
Mount Barker	3,151	10%	4,344	13%	8,985	28%	7,761	24%
Kangaroo Island	537	12%	981	21%	1,159	25%	1,324	29%
Victor Harbor	1,645	11%	2,260	15%	4,077	27%	4,000	26%
Yankalilla	522	11%	717	15%	1,293	28%	1,269	27%
Total AHFKI RDA Region	11,677	9%	18,986	15%	33,804	25%	28,962	21%
South Australia	187,974	11%	216,268	13%	458,542	27%	386,924	23%

Source: PHIDU (2015)

The rate of access to general practitioner (GP) services in the AHFKI region was 536 per 1,000 persons in 2009/10 which is similar to SA as a whole (535 per 1,000 persons). Within the AHFKI RDA region, the LGA with the highest proportion of the rate of GP services per 1,000 persons was in the Yankalilla LGA (604 GP services per 1,000 persons) and was lowest in the Adelaide Hills LGA (470 GP services per 1,000 persons) (Table 7-2).

[10] The Social Health Atlas of Australia (PHIDU 2017) data was sourced at the LGA level and not available for the McLaren Vale District.

Table 7-2 Total GP services in the AHFKI RDA region and SA, 2009/10

	Total GP services	Rate Per 1,000
AHFKI RDA Region		
Adelaide Hills	188,729	475
Alexandrina	134,009	507
Mount Barker	147,198	507
Kangaroo Island	22,624	474
Victor Harbor	98,271	557
Yankalilla	31,988	622
Total AHFKI RDA Region	622,818	477
South Australia	9,056,328	540

Source: PHIDU (2017)

7.2 Income Support

Another indication of regional wellbeing is the proportion of residents receiving income support. Data on the proportion of residents receiving income support were sourced from the Social Health Atlas of Australia (PHIDU 2017) for 2009 and 2014 and are presented in Table 7-3 [11].

In the AHFKI RDA region 14 per cent of the population received the age pension in 2014 (up from 13 per cent in 2009), 3 per cent received a disability pension (unchanged from 2009), 1 per cent received single parent payment (unchanged from 2009) and 3 per cent received unemployment benefits (up from 2 per cent in 2009). For SA as a whole the proportion of the population who received the aged pension was slightly lower than the AHFKI RDA region (12 per cent in 2014 and 2019), whereas the proportion who received a disability pension, single parent payment or unemployment benefits was slightly higher (Table 7-3).

Table 7-3 People receiving income support AHFKI RDA region and SA, 2009 and 2014

	Age pensioners (% of Population)		Disability support pensioners (% of Population)		Single parent payment beneficiaries (% of Population)		People receiving an unemployment benefit (% of Population)	
	2009	2014	2009	2014	2009	2014	2009	2014
AHFKI RDA Region								
Adelaide Hills	8%	9%	2%	2%	1%	0%	1%	2%
Alexandrina	18%	19%	5%	5%	1%	1%	3%	4%
Mount Barker	9%	9%	3%	3%	1%	1%	2%	3%
Kangaroo Island	10%	12%	4%	4%	1%	1%	3%	4%
Victor Harbor	25%	27%	5%	6%	1%	1%	3%	4%
Yankalilla	18%	20%	6%	6%	2%	1%	3%	5%
Total AHFKI RDA Region	12%	13%	3%	3%	1%	1%	2%	3%
South Australia	12%	12%	5%	4%	2%	1%	3%	4%

Source: PHIDU (2017)

[11] As with Section 7.1, the Social Health Atlas of Australia (PHIDU 2017) data was sourced at the LGA level and not available for the McLaren Vale District.

7.3 Adaptive Capacity

The community adaptive capacity index is a single index calculated as the weighted sum of sub-indices for physical capital, economic capital, human capital and social capital. These capitals represent the endowment of resources available to communities which are generally agreed to be positively correlated with community adaptive capacity. The Community Adaptive Capacity Index was developed by the State of Victoria through the Department of Environment and Primary Industries (DEPI), Dr Jacki Schirmer (University of Canberra) and EconSearch [12]. For more detail on the method used to estimate the community adaptive capacity index see Appendix 2.

The results of the community adaptive capacity index for the six LGAs and the McLaren Vale District are provided in Table 7–4. To give context to the index, the socio-economic indictors that contribute to the index are presented in Table 7–5. A brief discussion of each of the sub-indices follows.

7.3.1 Physical capital

Remoteness:

This is based on ARIA[13], which is an index of remoteness derived from measures of road distances between populated localities and Service Centres. Regions that have communities comparatively closer to Service Centres and populated areas are considered to have a greater adaptive capacity.

- Adelaide Hills, McLaren Vale, Victor Harbor, Mount Barker, Alexandrina and Yankalilla are all less remote than the state average.
- Kangaroo Island is the only LGA within the AHFKI RDA region that is comparatively remote.

Population size:

Population size is the population recorded for each region standardised to a ratio based on the mean population of localities (LGAs) in the set (i.e. LGAs in South Australia). Regions with populations that are greater than the state mean LGA population are considered to have a greater adaptive capacity. The state mean population for a LGA is 22,444 persons.

- Victor Harbor (13,841 persons), McLaren Vale (11,636 persons), Kangaroo Island (4,417 persons) and Yankalilla (4,396 persons) have populations that are lower than the state mean and are regions that have populations that are comparatively small.

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[12] Copyright of the Community Adaptive Capacity Index is vested in the State of Victoria through DEPI and may not be used by any other party or for any other purpose without the written consent of the State of Victoria through DEPI.

[13] *Accessibility/Remoteness Index of Australia* developed by the Australian Population and Migration Research Centre.

- Adelaide Hills (38,628 persons), Mount Barker (29,766 persons), Alexandrina (23,699 persons) and have populations greater than the state average.

Table 7–4 Community adaptive capacity index for the AHFKI RDA region [a]

	Weight	Adelaide Hills	Alexandrina	Mount Barker	Kangaroo Island	Victor Harbor	Yankalilla	McLaren Vale
Physical Capital								
Remoteness (ARIA)	10%	0.91	0.71	0.85	-0.75	0.88	0.70	0.94
Population size	5%	0.48	0.03	0.21	-0.55	-0.27	-0.55	-0.33
Population change	5%	0.01	1.58	1.35	0.23	1.68	0.50	0.14
Internet access	5%	1.45	0.38	1.15	0.07	0.00	0.15	1.18
Physical Capital Index	**25%**	**0.93**	**0.85**	**1.10**	**-0.43**	**0.79**	**0.37**	**0.14**
Economic Capital								
Economic diversity	5%	1.45	1.24	1.58	-0.65	1.16	0.14	1.10
Median household income	7%	2.29	-0.35	1.12	-0.35	-0.97	-0.97	1.12
Income/housing cost	11%	-0.12	-0.16	-0.14	-0.13	-0.19	-0.19	-0.15
Unemployment	11%	-0.13	-0.10	1.22	0.64	-1.29	0.52	0.86
Median household size	2%	-1.30	0.18	-1.00	0.77	1.02	0.76	-1.23
Economic Capital Index	**36%**	**1.03**	**0.07**	**1.46**	**0.08**	**-0.87**	**-0.05**	**0.19**
Human Capital								
Graduates	5%	1.73	0.44	0.94	0.20	0.45	0.30	1.00
Population 65 over	4%	0.76	-1.19	0.99	0.06	-3.31	-1.42	0.09
Completed high school	5%	1.51	0.01	0.85	0.11	-0.38	-0.11	0.79
One parent households	5%	0.62	0.12	-0.29	0.54	0.27	0.19	0.58
Lone person households	3%	2.00	0.55	1.39	-0.46	-0.20	-0.09	1.90
Females in non-routine jobs	3%	1.56	-0.54	0.37	0.87	-1.45	-0.60	0.55
Human Capital Index	**25%**	**2.22**	**-0.13**	**1.12**	**0.39**	**-1.11**	**-0.39**	**0.20**
Social Capital								
Voluntary work	4%	0.23	0.01	-0.25	1.24	0.14	0.28	-0.13
Community Strength	10%	-0.68	-0.68	-0.68	-0.68	-0.68	-0.68	-0.59
Social Capital Index	**14%**	**-0.47**	**-0.54**	**-0.63**	**-0.15**	**-0.50**	**-0.46**	**-0.06**
Adaptive Capacity Index	**100%**	**1.97**	**0.30**	**1.74**	**-0.10**	**-0.68**	**-0.15**	**1.42**

[a] The scores for all indicators, as well as the overall adaptive capacity index, have an average of 0.0 across all LGAs in the state. This means that, for any indicator, approximately 50% of LGAs will have a positive score and 50% will be negative. As an indicative guide, a value above +1.0 indicates a score in the top 16% of LGAs and a score above +2.0 indicates a score in the top 3%. Conversely, a score below -1.0 indicates a score in the bottom 16% of LGAs and a score below -2.0 indicates a score in the bottom 3%.

Sources: ABS (2017e*),* Australian Population and Migration Research Centre 2013 and EconSearch analysis.

Table 7–5 Socio-economic indicators, AHFKI RDA region

Indicator	Measure	State Average	AHFKI RDA						
			Adelaide Hills	Alexandrina	Mount Barker	Kangaroo Island	Victor Harbor	Yankalilla	McLaren Vale
Physical Capital									
Remoteness	ARIA Index (transformed)	0.00	0.91	0.71	0.85	-0.75	0.88	0.70	0.94
Population size	No. of persons	22,444	38,628	23,699	29,766	4,417	13,841	4,396	11,636
Population change	% change between 2006 to 2011	5%	2%	14%	13%	4%	15%	6%	3%
Internet access	% households	76%	86%	75%	83%	71%	71%	72%	83%
Economic Capital									
Economic diversity	Hachman Index	0.50	0.92	0.85	0.95	0.31	0.83	0.54	0.81
Median household income	$ per household per week	1,125	1,750	900	900	900	700	700	1,375
Income/housing cost	$ income per $1 housing cost	3.91	4.77	3.37	3.93	4.23	2.71	2.71	3.80
Unemployment	Unemployment rate	7.0%	5.8%	5.7%	2.2%	3.7%	8.9%	4.0%	3.1%
Median household size	No. of persons per household	2.41	2.70	2.33	2.62	2.18	2.12	2.18	2.68
Human Capital									
Graduates	% graduates in the population	52%	62%	51%	55%	49%	51%	50%	56%
Population 65 over	% population aged 65 or more	16%	13%	24%	12%	17%	35%	25%	17%
Completed high school	% persons completing high school	43%	54%	36%	46%	37%	31%	35%	45%
One parent households	% one parent families	16%	10%	13%	15%	11%	12%	12%	10%
Lone person households	% lone person households	28%	18%	26%	22%	32%	30%	30%	19%
Females in non-routine jobs	% females in non-routine jobs	23%	30%	21%	25%	27%	17%	21%	26%
Social Capital									
Voluntary work	% population volunteering	20%	30%	27%	26%	38%	27%	29%	26%
Community Strength	% community strength	70%	67%	67%	67%	67%	67%	67%	67%

Sources: ABS (2017e*),* Australian Population and Migration Research Centre 2013 and EconSearch analysis.

Population change:

Is the rate of population change recorded for each region (2006 to 2011) standardised to a ratio based on the median rate of population change calculated for regions in the set (i.e. LGAs in South Australia). Regions with population changes that are greater than the state median population change are considered to have a greater adaptive capacity. The state average population change has been an increase of 5 per cent from 2006 to 2011.

- Victor Harbor (15 per cent), Alexandrina (14 per cent), Mount Barker (13 per cent) and to a lesser extent Yankalilla (6 per cent) have all experienced population increases greater than the state average.
- Kangaroo Island (4 per cent), McLaren Vale (3 per cent) and Adelaide Hills (2 per cent) have experienced lower than state average population growth between 2006 and 2011.

Internet access:

Internet access is the proportion of households with an internet connection (2011) standardised to a ratio based on the proportion for South Australia. Regions with a proportion of internet connections that is lower than the state average are considered to have a less adaptive capacity. The average proportion of internet access for the state is 76 per cent.

- Adelaide Hills (86 per cent), McLaren Vale (83 per cent) and Mount Barker (83 per cent) have greater internet access than the state average.
- Alexandrina (75 per cent), Yankalilla (72 per cent), Victor Harbor and Kangaroo Island (71 per cent each) have lower internet access than the state average.

7.3.2 Economic capital

Economic diversity:

Economic diversity is an index calculated from industry of employment data available from the ABS *Census of Population and Housing* and is based on the Hachman Index. Regions which have a large portion of employment in a few key industries, which differ considerably from the portion of employment for those industries state-wide, will have a relatively low Hachman Index value. Conversely, those regions which more closely reflect the state-wide employment distribution will have a relatively high Hachman Index value. The benchmark index for the state is 0.50.

- All regions except for Kangaroo Island (0.31) have greater economic diversity than the state as a whole.

Median household income:

Median household income is calculated as the median household income for each locality standardised to a ratio based on the median for South Australia. Regions with median household income that is greater than the state median are considered to have greater adaptive capacity. The state median household income is $1,125 per week.

- Alexandrina ($900), Mount Barker ($900), Kangaroo Island ($900), Victor Harbor ($700) and Yankalilla ($700) have median household incomes well below the state median.
- The Adelaide Hills ($1,750) and McLaren Vale ($1,375) have a median household income above the state median.

Income to housing cost ratio:

Income to housing cost ratio is based on a ratio of the median household income to average household housing cost for each locality standardised to the ratio for all households in South Australia. Housing cost includes both rent and mortgage payments. This is a measure of housing affordability. Regions with income to housing cost ratios that are greater than the state ratio are considered to have greater adaptive capacity. The state income to housing cost ratio is 3.91.

- Adelaide Hills (4.77), Kangaroo Island (4.23) and Mount Barker (3.93) have proportionately higher household income to housing cost than the state average.
- McLaren Vale (3.80) and Alexandrina (3.37) and to a greater extent Victor Harbor and Yankalilla (2.71 each) have proportionately lower household income to housing cost than the state average.

Unemployment rate:

Unemployment rate is calculated as the total number of unemployed persons as a proportion of the total labour force for each locality standardised to a ratio based on the unemployment rate for South Australia. Regions with an unemployment rate that is lower than the state average are considered to have greater adaptive capacity. The state's unemployment rate is 7.0 per cent.

- All regions except for Victor Harbor (8.9 per cent) have lower unemployment rate than the state as a whole.

Median household size:

Median household size is calculated as average number of persons per household for each locality standardised to a ratio based on average household size for South Australia. Regions with median household sizes that are lower than the state average are considered to have greater adaptive capacity. The state's median household size is 2.41 persons.

- Adelaide Hills (2.70), McLaren Vale (2.68) and Mount Barker (2.62) have a slightly higher household sizes than the state median
- Alexandrina (2.33), Kangaroo Island (2.18), Yankalilla (2.18) and Victor Harbor (2.12) have lower household sizes than the state average.

7.3.3 Human capital

Percentage Graduates:

Percentage graduates is calculated as the total persons with a post-school qualification as a proportion of the total persons aged 15 and over for each locality standardised to a ratio based

on the percentage for South Australia. Regions with graduate rates that are higher than the state average are considered to have greater adaptive capacity. The state's proportion of graduates is 52 per cent.

- Adelaide Hills (62 per cent), McLaren Vale (56 per cent) and Mount Barker (55 per cent) have a slightly higher proportion of graduates than the state median.
- Alexandrina (51 per cent), Victor Harbor (51 per cent), Yankalilla (50 per cent) and Kangaroo Island (49 per cent) have a lower proportion of graduates than the state average.

Percentage of the population aged 65 and over:

Percentage of the population aged 65 and over is calculated as the total number of persons aged 65 and over as a proportion of the total number of persons for each locality standardised to a ratio based on the percentage for South Australia. Regions with lower proportions of the population aged 65 and over than the state average are considered to have greater adaptive capacity. The state's percentage of the population aged 65 and over is 16 per cent.

- Adelaide Hills (13 per cent) and Mount Barker (12 per cent) have a slightly lower proportion of elderly people than the state median.
- Victor Harbor (35 per cent), Yankalilla (25 per cent), Alexandrina (25 per cent), McLaren Vale (17 per cent) and Kangaroo Island (17 per cent) have a higher proportion of elderly people than the state average.

Percentage people completing high school:

Percentage people completing high school is calculated as the number of persons aged 15 and over to have completed high school as a proportion of the total persons aged 15 and over for each locality standardised to a ratio based on the percentage for South Australia. Regions with higher proportions of the population completing high school than the state average are considered to have greater adaptive capacity. The state's percentage of the population completing high school is 43 per cent.

- Adelaide Hills (54 per cent), Mount Barker (46 per cent) and McLaren Vale (45 per cent) have a higher proportion of people completing high school than the state median.
- Kangaroo Island (37 per cent), Alexandrina (36 per cent), Yankalilla (35 per cent) and Victor Harbor (31 per cent) have a lower proportion of people completing high school than the state average.

Single parent households:

Single parent households is calculated as the total number of single parent families as a proportion of the total number of families for each locality standardised to a ratio based on the percentage for South Australia. Regions with lower proportions of single parent families than the state average are considered to have greater adaptive capacity. The state's percentage of single parent families is 16 per cent.

All of the regions in the AHFKI RDA region have a lower proportion of single parent families than that of the state. The Adelaide Hills and McLaren Vale have the lowest proportion of single parent families (10 per cent each) and Mount Barker the highest (at 15 per cent) for the region.

Lone person households:

Lone person households is calculated as the total number of one person households as a proportion of the total number of occupied dwellings for each locality standardised to a ratio based on the percentage for South Australia. Regions with lower proportions of lone person households than the state average are considered to have greater adaptive capacity. The state's percentage of lone person households is 28 per cent.

- Kangaroo Island (32 per cent), Victor Harbor and Yankalilla (30 per cent, respectively) have a higher proportion of lone person households than that of the state.
- Adelaide Hills (18 per cent), McLaren vale (19 per cent), Mount Barker (22 per cent) and Alexandrina (26 per cent) have a lower proportion of lone person households than the state average.

Females in non-routine jobs:

Females in non-routine jobs is calculated as the total number of females in non-routine occupations (managers, professionals, technicians and trades workers, and community and personal service workers) as a proportion of the total number of female employed persons for each locality standardised to a ratio based on the proportion for South Australia. Regions with higher proportions of women in non-routine jobs than the state average are considered to have greater adaptive capacity. The state's percentage of women in non-routine jobs is 23 per cent.

- Adelaide Hills (30 per cent), Kangaroo Island (27 per cent), McLaren Vale (26 per cent) and Mount Barker (25 per cent) have a higher proportion of women in non-routine jobs greater than that of the state average.
- Alexandrina and Yankalilla (21 per cent, respectively) and Victor Harbor (17 per cent) have a lower proportion of women in non-routine occupations than the state average.

7.3.4 Social capital

Voluntary work:

Voluntary work is calculated as the total number of volunteers as a proportion of the total number of persons aged 15 and over for each locality standardised to a ratio based on the percentage for South Australia. Regions with higher proportions of volunteers than the state average are considered to have greater adaptive capacity. The state's percentage of people engaging in voluntary work is 20 per cent.

All regions within the AHFKI RDA region have a higher proportion of volunteers than the state average, with Kangaroo Island having the highest proportion of volunteers (38 per cent) and Mount Barker and McLaren Vale the lowest (26 per cent each).

Community Strength

Data on community strength is sourced from the Social Health Atlas of Australia and is calculated as the simple average of the following measures of community strength:

- Can you get help from family, friends or neighbours when you need it?
- Are you a member of an organised sport or church or community group in your local area?
- If you have school aged children, are you actively involved with activities in their school?

The measure is then standardised for each locality to a ratio based on the percentage for South Australia. Regions with higher proportions of community strength than the state average are considered to have greater adaptive capacity. The state's percentage of community strength is 70 per cent.

All regions within the AHFKI RDA region have a slightly lower proportion of community strength than the state average, with all the regions having a community strength measure of 67 per cent.

7.3.5 Summary

Table 7–6 provides a summary of the overall community adaptive capacity index scores and the strengths and vulnerabilities of each of the LGAs and the McLaren Vale District within the AHFKI RDA region. The adaptive capacity index values (in Table 7–4 and Table 7–6) are presented as z-scores which enable easy interpretation. For example, a value of zero indicates an adaptive capacity equal to the SA average for LGAs. A value above +1.0 indicates a score in the top 16 per cent of LGAs and a score above +2.0 indicates a score in the top 3 per cent. Conversely, a score below -1.0 indicates a score in the bottom 16 per cent of LGAs and a score below -2.0 indicates a score in the bottom 3 per cent.

Table 7–6 Community adaptive capacity index scores, strengths and vulnerabilities by LGA for the AHFKI RDA region

	Community Adaptive Capacity Index Score	Strengths	Vulnerabilities
Adelaide Hills	1.97 (top 4% of LGAs in SA)	Remoteness Population size Internet access Economic diversity Median household income Income/housing cost Unemployment Graduates Population 65 over Completed high school One parent households Lone person households Females in non-routine jobs Voluntary work	Population change Median household size Community Strength
Mount Barker	1.74 (top 11% of LGAs in SA)	Remoteness Population size Population change Internet access Economic diversity Income/housing cost Unemployment Graduates Population 65 over Completed high school One parent households Lone person households Females in non-routine jobs Voluntary work	Median household income Median household size Community Strength
Alexandrina	0.30 (top 43% of LGAs in SA)	Remoteness Population size Population change Economic diversity One parent households Lone person households Voluntary work	Internet access Median household income Income/housing cost Graduates Population 65 over Completed high school Females in non-routine jobs Community Strength Unemployment
Kangaroo Island	-0.10 (bottom 43% of LGAs in SA)	Income/housing cost Unemployment Median household size One parent households Females in non-routine jobs Voluntary work	Remoteness Population size Population change Internet access Economic diversity Median household income Graduates Population 65 over Completed high school Lone person households Community Strength
Yankalilla	-0.15 (bottom 34% of LGAs in SA)	Remoteness Population change Economic diversity Median household size One parent households Voluntary work	Population size Internet access Median household income Income/housing cost Unemployment Graduates Population 65 over Completed high school Lone person households Females in non-routine jobs Community Strength
Victor Harbor	-0.68 (bottom 35% of LGAs in SA)	Remoteness Population change Economic diversity Median household size One parent households Voluntary work	Population size Internet access Median household income Income/housing cost Unemployment Graduates Population 65 over Completed high school Lone person households Females in non-routine jobs Community Strength
Mclaren Vale	1.42 (top 8% of LGAs in SA)	Remoteness Internet access Economic diversity Median household income Unemployment Graduates Completed high school One parent households Lone person households Females in non-routine jobs Voluntary work	Population size Population change Income/housing cost Median household size Population 65 over Community Strength

8. BUSINESS

8.1 Business Count

A count of business by industry and the number of people employed is detailed in Table 8-1 for the AHFKI RDA region and in Table 8-2 for SA as a whole for 2016.

In the AHFKI RDA region the industries with the most number of businesses were agriculture, forestry and fishing (27 per cent of the total number of businesses in the region) and construction (17 per cent) (Table 8-1). For SA the industries with the most number of businesses were construction (15 per cent of total businesses in SA), agriculture, forestry and fishing (13 per cent), rental, hiring and real estate services (12 per cent) and financial and insurance services (11 per cent) (Table 8-2).

Table 8-1 Count of businesses by number of people employed AHFKI RDA region, June 2016

Industry	AHFKI						
	Non employing	1-4	5-19	20-199	200+	Total	Share of Total Businesses
A Agriculture, Forestry and Fishing	1,192	319	101	8	0	1,620	27%
B Mining	14	12	3	0	0	29	0%
C Manufacturing	180	83	61	11	0	335	6%
D Electricity, Gas, Water and Waste Services	9	6	3	0	0	18	0%
E Construction	688	273	59	0	0	1,020	17%
F Wholesale Trade	87	53	29	0	0	169	3%
G Retail Trade	170	124	70	6	0	370	6%
H Accommodation and Food Services	97	58	97	22	0	274	5%
I Transport, Postal and Warehousing	174	69	27	3	0	273	5%
J Information Media and Telecommunications	25	9	3	0	0	37	1%
K Financial and Insurance Services	231	35	3	0	0	269	4%
L Rental, Hiring and Real Estate Services	399	47	15	0	0	461	8%
M Professional, Scientific and Technical Services	279	112	19	6	0	416	7%
N Administrative and Support Services	99	28	12	6	0	145	2%
O Public Administration and Safety	6	0	0	0	0	6	0%
P Education and Training	18	6	3	9	0	36	1%
Q Health Care and Social Assistance	99	61	29	0	0	189	3%
R Arts and Recreation Services	33	17	12	3	0	65	1%
S Other Services	105	72	9	0	0	186	3%
Not Classified 1	61	12	3	0	0	76	1%
Total	3,966	1,396	558	74	0	5,994	100%
Share of Total Businesses	66%	23%	9%	1%	0%	100%	

Source: ABS (2017d)

In the AHFKI RDA region the majority of businesses (66 per cent) did not employ another person, 23 per cent employed between 1 and 4 persons, 9 per cent employed between 5 and 19 people, 1 per cent employed between 20 and 199 and no businesses employed more than 200 people, very similar to SA as a whole (Table 8-1 and Table 8-2).

Table 8-2 Count of businesses by number of people employed SA, June 2016

Industry	South Australia						
	Non employing	1-4	5-19	20-199	200+	Total	Share of Total Businesses
A Agriculture, Forestry and Fishing	11,272	4,637	1,495	194	3	17,601	13%
B Mining	311	106	57	12	6	492	0%
C Manufacturing	2,792	1,478	1,230	403	30	5,933	4%
D Electricity, Gas, Water and Waste Services	228	115	56	15	3	417	0%
E Construction	13,811	5,273	1,361	246	7	20,698	15%
F Wholesale Trade	2,462	1,302	733	177	16	4,690	3%
G Retail Trade	3,583	2,776	1,687	351	25	8,422	6%
H Accommodation and Food Services	1,547	1,799	1,685	481	9	5,521	4%
I Transport, Postal and Warehousing	5,778	1,443	358	91	11	7,681	5%
J Information Media and Telecommunications	600	210	54	17	0	881	1%
K Financial and Insurance Services	12,746	1,792	265	47	6	14,856	11%
L Rental, Hiring and Real Estate Services	14,465	1,264	384	69	6	16,188	12%
M Professional, Scientific and Technical Services	7,998	3,923	1,074	243	7	13,245	9%
N Administrative and Support Services	2,997	1,165	477	192	19	4,850	3%
O Public Administration and Safety	166	84	62	25	0	337	0%
P Education and Training	776	290	186	149	6	1,407	1%
Q Health Care and Social Assistance	4,922	2,157	957	280	29	8,345	6%
R Arts and Recreation Services	882	307	118	48	9	1,364	1%
S Other Services	2,925	2,211	659	71	3	5,869	4%
Not Classified 1	1,481	211	57	12	3	1,764	1%
Total	91,742	32,543	12,955	3,123	198	140,561	100%
Share of Total Businesses	65%	23%	9%	2%	0%	100%	

Source: ABS (2017d)

8.2 Business Ownership

Data on the number of business owners by age and industry were sourced from the ABS Census (ABS 2017e) and are detailed for the AHFKI RDA region in Table 8-3 and for SA in Table 8-4. Not surprisingly, the highest proportion of business owners fell in the 35 to 64 year age cohort in the AHFKI RDA region and for SA as a whole. The industry sectors where business ownership was greatest were the construction (20 per cent), agriculture, forestry and fishing (12 per cent) and professional, scientific and technical services (10 per cent) sectors (Table 8-3). For SA as a whole the industry sectors where business ownership was greatest was the construction (19 per cent), agriculture, forestry and fishing (11 per cent), professional, scientific and technical services (9 per cent) and retail trade (9 per cent) sectors (Table 8-4).

Table 8-3 Count of business owners by age and industry, AHFKI RDA region, 2011

	15-19 yrs	20-24 yrs	25-29 yrs	30-34 yrs	35-39 yrs	40-44 yrs	45-49 yrs	50-54 yrs	55-59 yrs	60-64 yrs	65 yrs +	Total
Agriculture, Forestry and Fishing	0	13	36	47	111	149	177	190	238	220	369	1,550
Mining	0	0	0	0	3	6	12	3	16	18	0	58
Manufacturing	3	13	38	51	97	146	171	150	134	135	94	1,032
Electricity, Gas, Water and Waste Services	0	0	3	7	8	14	8	6	8	7	6	67
Construction	13	70	147	235	285	377	422	392	292	229	107	2,569
Wholesale Trade	0	3	13	18	41	54	66	71	62	64	39	431
Retail Trade	4	11	28	51	92	142	161	171	155	128	93	1,036
Accommodation and Food Services	0	3	22	34	56	59	63	88	68	64	34	491
Transport, Postal and Warehousing	0	3	20	21	32	55	76	93	75	55	47	477
Information Media and Telecommunications	0	0	0	4	8	16	22	19	16	22	14	121
Financial and Insurance Services	0	0	0	9	28	38	28	35	20	28	18	204
Rental, Hiring and Real Estate Services	0	0	3	4	21	34	28	25	31	32	31	209
Professional, Scientific and Technical Services	0	17	29	67	131	184	188	206	188	161	126	1,297
Administrative and Support Services	10	3	16	37	71	89	134	126	101	84	27	698
Public Administration and Safety	3	0	0	0	8	3	11	5	16	12	4	62
Education and Training	3	13	7	15	34	41	55	47	68	64	34	381
Health Care and Social Assistance	0	5	23	40	75	99	102	127	140	105	75	791
Arts and Recreation Services	0	6	12	19	33	20	29	36	40	34	21	250
Other Services	3	27	45	58	112	113	120	142	123	86	49	878
Inadequately described or not stated	0	6	10	15	25	37	33	22	21	30	30	229
Total	39	193	452	732	1,271	1,676	1,906	1,954	1,812	1,578	1,218	12,831

Source: ABS (2017e)

Table 8-4 Count of business owners by age and industry, SA, 2011

	15-19 yrs	20-24 yrs	25-29 yrs	30-34 yrs	35-39 yrs	40-44 yrs	45-49 yrs	50-54 yrs	55-59 yrs	60-64 yrs	65 yrs +	Total
Agriculture, Forestry and Fishing	25	138	370	686	1,002	1,308	1,481	1,565	1,615	1,490	1,963	11,643
Mining	0	3	19	15	23	41	52	51	63	53	35	355
Manufacturing	19	80	262	486	739	1,099	1,262	1,212	1,058	849	651	7,717
Electricity, Gas, Water and Waste Services	3	6	21	29	68	70	86	87	71	51	35	527
Construction	74	810	1,659	2,060	2,468	2,945	3,106	2,847	2,217	1,760	890	20,836
Wholesale Trade	9	26	111	206	367	468	564	623	520	485	387	3,766
Retail Trade	54	129	381	629	998	1,283	1,425	1,497	1,293	1,044	730	9,463
Accommodation and Food Services	37	127	266	441	596	702	757	746	587	454	252	4,965
Transport, Postal and Warehousing	10	123	296	349	405	662	867	945	829	704	418	5,608
Information Media and Telecommunications	6	39	71	78	127	117	140	123	91	114	63	969
Financial and Insurance Services	0	22	38	137	255	340	318	335	320	281	217	2,263
Rental, Hiring and Real Estate Services	4	16	33	101	172	225	296	303	266	256	276	1,948
Professional, Scientific and Technical Services	6	132	377	797	1,209	1,388	1,381	1,384	1,424	1,192	889	10,179
Administrative and Support Services	49	122	257	403	583	809	897	895	736	667	294	5,712
Public Administration and Safety	5	20	22	32	42	73	80	77	75	69	57	552
Education and Training	52	140	175	188	251	360	364	388	367	339	264	2,888
Health Care and Social Assistance	17	82	286	502	798	946	988	1,137	1,029	819	597	7,201
Arts and Recreation Services	10	114	146	153	156	207	183	180	188	146	109	1,592
Other Services	43	251	569	683	1,070	1,300	1,171	1,197	987	770	516	8,557
Inadequately described or not stated	30	57	125	164	215	274	279	299	254	247	274	2,218
Total	453	2,437	5,484	8,139	11,544	14,617	15,697	15,891	13,990	11,790	8,917	108,959

Source: ABS (2017e)

9. ECONOMIC STRUCTURE OF THE REGIONAL ECONOMY

For the purpose of describing the current level of economic activity in the AHFKI RDA region and in order to estimate the regional economic impact of the tourism industry in the region, regional input-output (I-O) models[14] were constructed for 2015/16.

Models were also constructed for:

- The whole AHFKI RDA region
- The Adelaide Hills and Fleurieu region (AHFKI RDA region excluding Kangaroo Island)
- The Adelaide Hills Council
- The Mount Barker District Council
- Alexandrina Council
- The City of Victor Harbor
- The Yankalilla District Council
- Kangaroo Island Council
- The McLaren Vale Character Preservation District

A detailed profile of the economic structure of the AHFKI RDA regional economy for 2015/16 provided below is consistent with the method and data sources used in EconSearch (2017). Similar data for the other regions listed above are provided in Appendix 5. Note that the basis for estimating regional employment has changed and the estimates of economic activity and economic impact presented in this report are not directly comparable with previous reports (EconSearch 2011, 2012 and 2013).

Economic activity in the regions in 2015/16 is presented in terms of the following indicators[15]:

- employment
- output
- household income
- other value added
- gross regional product (GRP)
- imports

[14] See Appendix 3 for an overview of economic impact analysis using the input-output method.

[15] See Appendix 4 for a glossary of input-output terminology.

- tourism expenditure
- exports.

Employment is a measure of the number of working proprietors, managers, directors and other employees, in terms of the number of full-time equivalents and total (i.e. full-time and part-time) jobs. Employment is measured by place of remuneration rather than place of residence.

(Value of) Output is a measure of the gross revenue of goods and services produced by commercial organisations (e.g. farm-gate value of production) and gross expenditure by government agencies. Total output needs to be used with care as it includes elements of double counting (e.g. the value of winery output includes the farm-gate value of grapes) and overstates the real contribution to economic activity.

Household income is a component of GRP and is a measure of wages and salaries paid in cash and in kind, drawings by owner operators and other payments to labour including overtime payments, employer's superannuation contributions and income tax, but excluding payroll tax.

Other value added is another component of GRP and includes gross operating surplus (excluding the drawings of working proprietors) and all taxes, less subsidies.

Gross regional product (GRP) is a measure of the net contribution of an activity to the regional economy[16]. Gross regional product 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).

Imports are a measure of the value of goods and services purchased by intermediate sectors and by components of final demand in the region/state of interest from other regions, interstate and overseas.

Tourism expenditure is a measure of the value of sales of goods and services to visitors to the state or region.

Exports (other) are a measure of the value of goods and services sold from the region/state of interest to consumers in other regions, interstate and overseas, net of sales to visitors to the region.

The demographic impact of changes in the level of employment in the region was measured using **population** (i.e. the number of people resident in the region) as an indicator.

A brief summary of the regional economic structure for the AHFKI RDA region follows[17]. These data were derived from the regional economic impact model prepared specifically for this

[16] Similarly, contribution to gross state product (GSP) is a measure of the net contribution of an activity to the state economy.

[17] Similar data for the other regions are provided in Appendix 5.

project. The economic profiles of the regional economies have been prepared in terms of a 20-sector industry classification[18]. Economic activity in the region is described in terms of:

- employment
- gross regional product (GRP)
- imports and exports.

9.1 Employment

It was estimated that there were approximately 41,800 jobs (around 37,200 fte jobs) in the AHFKI RDA region in 2015/16 (Table 9-1).

A sectoral breakdown of employment, household income and household expenditure for the AHFKI RDA region in 2015/16 is provided in Table 9-1. The top five contributors to total employment in the region in 2015/16 were:

- retail trade (13.4 per cent)
- health and community services (12.6 per cent)
- agriculture, forestry and fishing (9.8 per cent)
- manufacturing (9.5 per cent)
- Education and training (8.3 per cent).

In 2015/16 employment in South Australia was approximately 733,500 (total jobs) which means the AHFKI RDA region accounts for approximately 5.7 per cent of the total state employment.

9.2 Gross Regional Product

GRP in the AHFKI RDA region in 2015/16 was estimated to be $4.83 billion (Table 9-2). The contribution of an individual industry to GRP is calculated as the sum of household income, gross operating surplus and gross mixed income and indirect taxes less subsidies. In 2015/16, the top five contributors to GRP were:

- agriculture, forestry and fishing (14.1 per cent)
- ownership of dwellings (11.4 per cent)
- manufacturing (8.3 per cent)
- health and community services (6.5 per cent)
- building and construction (6.2 per cent).

[18] The economic profile of the regional economy is also available in terms of a 78-sector industry classification if required.

In 2015/16 South Australia's gross state product was $100.3 billion which means that the AHFKI RDA region accounts for approximately 4.8 per cent of the state economy.

9.3 Imports and Exports

A breakdown of the value of imports and exports by industry sector for the AHFKI RDA region in 2015/16 is provided in Table 9-3. These data were derived from the I-O model for the region. Some of the key points to note from these data follow.

- Expenditure by households accounted for approximately 46 per cent of the total value of goods and services imported into the region in 2015/16 from intrastate (i.e. other regions within SA), interstate and overseas.
- Of the intermediate sectors, the top importers in the region in 2015/16 were the building and construction (7.4 per cent) and agriculture, forestry and fishing (3.6 per cent) sectors.
- Expenditure by tourists ($650m) contributed approximately 29 per cent of the total value of exports from the region in 2015/16. The balance (i.e. 'other exports' approximately $1.6b) represents the value of goods and services purchased by consumers (i.e. households, businesses, governments, etc.) in other regions within SA, interstate and internationally.
- Total regional expenditure by tourists ($650m) comprised approximately 11 per cent of the SA total expenditure by tourists in 2015/16 ($5.9b).
- The top contributors to the value of 'other exports' from the region in 2015/16 were agriculture, forestry and fishing (28 per cent), manufacturing (26 per cent), mining (18 per cent) and building and construction (6 per cent) sectors.
- The trade balance (i.e. exports less imports) in the AHFKI RDA region in 2015/16 was approximately -$1.2b.

Table 9-1 Employment, household income and household expenditure, AHFKI RDA region, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	4,100	9.8%	4,297	11.5%	274	10.4%	74	1.8%
Mining	605	1.4%	890	2.4%	138	5.2%	2	0.0%
Manufacturing	3,956	9.5%	4,024	10.8%	258	9.8%	291	7.0%
Electricity, gas and water	649	1.6%	738	2.0%	64	2.4%	163	3.9%
Building and construction	3,452	8.3%	3,443	9.2%	287	10.9%	3	0.1%
Wholesale trade	709	1.7%	682	1.8%	73	2.8%	134	3.2%
Retail trade	5,605	13.4%	4,197	11.3%	222	8.4%	282	6.8%
Accommodation, cafes & restaurants	3,315	7.9%	2,311	6.2%	109	4.1%	133	3.2%
Transport and storage	1,432	3.4%	1,439	3.9%	133	5.0%	65	1.6%
Communication and publishing services	271	0.6%	239	0.6%	19	0.7%	21	0.5%
Finance and insurance	436	1.0%	381	1.0%	46	1.8%	57	1.4%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	644	15.5%
Rental Hiring Real Estate Services	588	1.4%	544	1.5%	56	2.1%	24	0.6%
Prof Scientific Tech Services	2,350	5.6%	1,962	5.3%	102	3.9%	6	0.1%
Admin Support Services	1,399	3.3%	935	2.5%	45	1.7%	4	0.1%
Public administration and defence	1,985	4.7%	2,110	5.7%	174	6.6%	5	0.1%
Education and training	3,481	8.3%	3,093	8.3%	226	8.6%	157	3.8%
Health and community services	5,263	12.6%	3,976	10.7%	309	11.7%	158	3.8%
Cultural and recreational services	400	1.0%	320	0.9%	31	1.2%	12	0.3%
Personal and other services	1,838	4.4%	1,648	4.4%	75	2.8%	60	1.4%
Total Intermediate	41,833	100.0%	37,229	100.0%	2,642	100.0%	2,293	55.2%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	290	7.0%
Imports	-	-	-	-	-	-	1,573	37.9%
Primary Inputs Total	-	-	-	-	-	-	1,863	44.8%
GRAND TOTAL	41,833	100.0%	37,229	100.0%	2,642	100.0%	4,156	100.0%

[a] The economic profile of the regional economy is also available in terms of a 78-sector industry classification if required.

[b] The ownership of dwellings sector is a notional sector designed to impute a return to the state's housing stock. Total value of output in this sector is an estimate of rent earned on leased dwellings and imputed rent on the balance of owner-occupied dwellings.

[c] Gross operating surplus and gross mixed income.

Source: EconSearch (2017)

Table 9-2 Components of gross regional product in the AHFKI RDA region by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	274	10.4%	383	24.4%	24	10.3%	681	14.1%
Mining	138	5.2%	122	7.8%	6	2.5%	266	5.5%
Manufacturing	258	9.8%	120	7.6%	23	10.0%	401	8.3%
Electricity, gas and water	64	2.4%	98	6.2%	18	7.8%	180	3.7%
Building and construction	287	10.9%	0	0.0%	10	4.3%	297	6.2%
Wholesale trade	73	2.8%	31	2.0%	5	2.3%	110	2.3%
Retail trade	222	8.4%	43	2.7%	12	5.2%	277	5.7%
Accommodation, cafes & restaurants	109	4.1%	26	1.6%	18	7.9%	153	3.2%
Transport and storage	133	5.0%	30	1.9%	11	4.9%	174	3.6%
Communication and publishing services	19	0.7%	14	0.9%	1	0.3%	35	0.7%
Finance and insurance	46	1.8%	111	7.0%	9	3.7%	165	3.4%
Ownership of dwellings [b]	0	0.0%	495	31.5%	55	23.9%	550	11.4%
Rental Hiring Real Estate Services	56	2.1%	43	2.7%	14	6.1%	113	2.3%
Prof Scientific Tech Services	102	3.9%	0	0.0%	3	1.4%	105	2.2%
Admin Support Services	45	1.7%	0	0.0%	3	1.1%	47	1.0%
Public administration and defence	174	6.6%	43	2.7%	6	2.6%	223	4.6%
Education and training	226	8.6%	7	0.5%	3	1.5%	237	4.9%
Health and community services	309	11.7%	0	0.0%	6	2.8%	315	6.5%
Cultural and recreational services	31	1.2%	3	0.2%	0	-0.1%	34	0.7%
Personal and other services	75	2.8%	2	0.2%	4	1.6%	81	1.7%
Total Intermediate	2,642	100.0%	1,571	100.0%	230	100.0%	4,444	92.0%
Net Taxes in Final Demand	-	-	-	-	-	-	384	8.0%
Gross Regional Product	-	-	-	-	-	-	4,828	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Table 9-3 Value of imports and exports by industry, AHFKI RDA region, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	441	28.1%	441	19.9%	123	3.6%
Mining	0	0.0%	279	17.8%	279	12.6%	40	1.2%
Manufacturing	54	8.4%	399	25.5%	453	20.4%	250	7.4%
Electricity, gas and water	0	0.0%	21	1.4%	21	1.0%	66	1.9%
Building and construction	0	0.0%	101	6.4%	101	4.6%	99	2.9%
Wholesale trade	21	3.2%	19	1.2%	39	1.8%	44	1.3%
Retail trade	120	18.5%	5	0.3%	125	5.7%	49	1.5%
Accommodation, cafes & restaurants	138	21.3%	13	0.8%	151	6.8%	39	1.1%
Transport and storage	16	2.4%	44	2.8%	60	2.7%	59	1.7%
Communication and publishing services	0	0.0%	3	0.2%	3	0.1%	7	0.2%
Finance and insurance	0	0.0%	23	1.4%	23	1.0%	37	1.1%
Ownership of dwellings [b]	28	4.3%	37	2.4%	65	2.9%	79	2.3%
Rental Hiring Real Estate Services	7	1.0%	13	0.8%	20	0.9%	49	1.4%
Prof Scientific Tech Services	0	0.0%	5	0.3%	5	0.2%	12	0.4%
Admin Support Services	0	0.0%	2	0.1%	2	0.1%	14	0.4%
Public administration and defence	0	0.0%	21	1.4%	21	1.0%	49	1.4%
Education and training	1	0.1%	9	0.6%	9	0.4%	19	0.6%
Health and community services	0	0.0%	12	0.7%	12	0.5%	22	0.6%
Cultural and recreational services	16	2.5%	2	0.1%	18	0.8%	3	0.1%
Personal and other services	3	0.5%	2	0.1%	5	0.2%	16	0.5%
Total Intermediate	404	62.2%	1,451	92.5%	1,855	83.6%	1,077	31.8%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	46	7.0%	1	0.1%	47	2.1%	-	-
Imports	200	30.8%	116	7.4%	316	14.3%	-	-
Primary Inputs Total	245	37.8%	118	7.5%	363	16.4%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	1,573	46.4%
Government Expenditure	-	-	-	-	-	-	195	5.8%
Gross Fixed Capital	-	-	-	-	-	-	228	6.7%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	200	5.9%
Other Exports	-	-	-	-	-	-	116	3.4%
Final Demand Total	-	-	-	-	-	-	2,313	68.2%
GRAND TOTAL	650	100.0%	1,568	100.0%	2,218	100.0%	3,390	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch 2017

9.4 Tourism

9.4.1 Method of analysis

Tourism is not specified as a sector within the I-O model because the measureable 'economic effort' draws on a wide range of industries like accommodation, cafes and restaurants, retail, transport, agriculture, forestry and fishing and others. However, the relative contribution of tourism to economic activity in the region can be measured and estimates are provided in Table 9-4. The method used to estimate a profile of visitor expenditure is consistent with that used by the ABS and uses data published by Tourism Research Australia (TRA).

Total tourism expenditure in the AHFKI RDA region in 2015/16 was approximately $650 million and includes net taxes (principally GST) and expenditure on imported goods and services from other regions in SA, interstate and overseas. Estimates of tourism expenditure are in basic prices, that is, net of net taxes (i.e. taxes minus subsidies) and marketing and transport margins.

Estimates of economic impact or economic contribution of tourism are presented in terms of the following indicators:

- gross regional product
- employment
- population.

Note that this report is a statement of regional economic impact (i.e. so many jobs, so much income, etc.) arising from tourism industry activity. The results of the analysis do not indicate whether the costs to the region of the current level of activity in these industries or changes to these levels of activity outweigh the benefits. An assessment of this nature would require a comprehensive cost-benefit analysis.

9.4.2 Results of the impact analysis

As noted above, total tourism expenditure in the AHFKI RDA region in 2015/16 was approximately $650 million. In aggregate, it was estimated that this expenditure by tourists generated the following level of regional economic and demographic activity (Table 9-4).

- Approximately $491 million in GRP which represents 10.2 per cent of the regional total ($4.83 billion).
- Approximately 5,515 full-time and part-time jobs which represents 13.2 per cent of the regional total (41,833 total jobs).
- Approximately 4,485 fte jobs which represents 12.0 per cent of the regional total (37,229 fte).
- Through market-driven activities (i.e. business activity generated by tourism expenditure) and related non-market activities (i.e. population driven services such as education) a total population impact of 7,815 persons. This represents 5.8 per cent of the 2015/16 regional total (i.e. 135,242 persons).

Estimates of GRP, employment and population impacts in Table 9-4 account for both the direct and flow-on effects attributable to expenditure by tourists. For example, whilst there is little or no tourism expenditure in the education or health and community services sectors (i.e. direct effects), there is significant flow-on activity generated in these sectors of the regional economy as a result of subsequent rounds of production and consumption induced expenditure.

Table 9-4 The contribution of tourism to gross regional product, employment and population in the AHFKI RDA region, 2015/16

	Tourism Expenditure [a]	Contribution to GRP	Employment Impact		Population Impact
	$m	$m	fte	Total Jobs	no.
Food & Beverage Products	40	34	308	317	544
Wholesale Trade	16	12	77	80	137
Retail Trade	111	81	1,224	1,635	2,122
Accommodation	65	34	402	482	685
Food and Beverage Serv	67	38	635	960	1,081
Transport	29	26	243	245	429
Property and Business Serv	9	22	309	398	545
Other Sectors	67	198	1,287	1,398	2,272
Net Taxes [b]	46	46	-	-	-
Imports	200	-	-	-	-
Total (Tourism)	650	491	4,485	5,515	7,815
Regional Total [c]	-	4,828	37,229	41,833	135,242
Tourism Contribution to Regional Total	-	10.2%	12.0%	13.2%	5.8%

[a] In basic prices, that is, net of net taxes (taxes minus subsidies) and marketing and transport margins.

[b] Indirect taxes (principally GST) less subsidies.

[c] The regional population estimate is derived from Estimated Resident Population (ABS 2015a).

Source: EconSearch (2017)

Tourism related contribution to GRP in the Adelaide Hills in 2015/16 was approximately $491 million. Using the standard industry classification and as described in Section 9.2, the top five contributors to GRP in the AHFKI RDA region for 2015/16 were:

- agriculture, forestry and fishing ($681m)
- ownership of dwellings ($550m)
- manufacturing ($401m)
- health and community services ($315m)
- building and construction ($297m).

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Disclaimer

The assignment is a consulting engagement as outlined in the 'Framework for Assurance Engagements', issued by the Auditing and Assurances Standards Board, Section 17. Consulting engagements employ an assurance practitioner's technical skills, education, observations, experiences and knowledge of the consulting process. The consulting process is an analytical process that typically involves some combination of activities relating to: objective-setting, fact-finding, definition of problems or opportunities, evaluation of alternatives, development of recommendations including actions, communication of results, and sometimes implementation and follow-up.

The nature and scope of work has been determined by agreement between BDO and the Client. This consulting engagement does not meet the definition of an assurance engagement as defined in the 'Framework for Assurance Engagements', issued by the Auditing and Assurances Standards Board, Section 10.

Except as otherwise noted in this report, we have not performed any testing on the information provided to confirm its completeness and accuracy. Accordingly, we do not express such an audit opinion and readers of the report should draw their own conclusions from the results of the review, based on the scope, agreed-upon procedures carried out and findings.

APPENDIX 1 AGE DISTRIBUTION BY LGA

Appendix Table 1-1 Age distribution of the population for the AHFKI RDA region by LGA, 2011 and 2016

	Census Year		% change from 2011
	2011	2016	
Adelaide Hills			
0 to 14	7,592	7,259	-4.4%
15 to 64	25,861	24,776	-4.2%
65 and older	5,175	6,820	31.8%
Total	*38,628*	*38,855*	*0.6%*
Alexandrina			
0 to 14	3,999	4,038	1.0%
15 to 64	14,105	14,412	2.2%
65 and older	5,593	7,429	32.8%
Total	*23,697*	*25,879*	*9.2%*
Mount Barker			
0 to 14	6,511	6,740	3.5%
15 to 64	19,630	21,505	9.6%
65 and older	3,628	5,140	41.7%
Total	*29,769*	*33,385*	*12.1%*
Kangaroo Island			
0 to 14	786	780	-0.8%
15 to 64	2,878	2,839	-1.4%
65 and older	752	1,094	45.5%
Total	*4,416*	*4,713*	*6.7%*
Victor Harbor			
0 to 14	1,832	1,906	4.0%
15 to 64	7,201	7,004	-2.7%
65 and older	4,806	5,750	19.6%
Total	*13,839*	*14,660*	*5.9%*
Yankalilla			
0 to 14	653	722	10.6%
15 to 64	2,653	2,943	10.9%
65 and older	1,089	1,500	37.7%
Total	*4,395*	*5,165*	*17.5%*
McLaren Vale District			
0 to 14	2,203	2,054	-6.8%
15 to 64	7,469	7,415	-0.7%
65 and older	1,964	2,568	30.8%
Total	*11,636*	*12,037*	*3.4%*

Source: ABS (2017e)

APPENDIX 2 COMMUNITY ADAPTIVE CAPACITY INDEX METHOD

In order to better understand the vulnerability of Victorian towns to change—in particular change in the Forestry and Wood Products Industries—a community adaptive capacity (AC) index was developed. The design of this Community Adaptive Capacity Index was by the State of Victoria through the Department of Environment and Primary Industries (DEPI), Dr Jacki Schirmer (University of Canberra) and EconSearch.[19] The index was designed in reference to the extensive research literature in this area, plus novel empirical research conducted for DEPI in 2012.[20]

There are many 'off the shelf' approaches to measuring community adaptive capacity, and related concepts such as the vulnerability or wellbeing of communities. For a succinct discussion and review of these approaches, see Price-Robertson and Knight (2012). As described in ABARE-BRS (2010), there is considerable agreement in the literature that adaptive capacity can be understood in terms of a community's endowments of various resources. A common way of describing these resources is to classify them as forms of capital, namely built, human, natural, social or financial capital (Burnside 2007; Ellis 2000; Nelson et al. 2005; Yohe and Tol 2002). The five capitals commonly discussed at the community scale are as follows, and are in their generic description the same as those described earlier in this report (Ellis 2000):

- human capital - labour and influences on the productivity of labour including education, skills and health
- social capital - claims on others by virtue of social relationship
- natural capital - land, water and biological resources
- physical capital - produced by economic activity including infrastructure, equipment and technology
- financial capital - savings and credit.

The index developed for this study consists of four of these forms of capital, while excluding natural capital. This is principally because there are no readily available and robust measures of natural capital, and partly because the natural resource of principal interest in Schirmer and Mylek (2013), namely timber, was addressed through other parts of their report and its conceptual framework, such as the business vulnerability index.[21] In the community AC index

[19] Copyright of the Community Adaptive Capacity Index is vested in the State of Victoria through DEPI and may not be used by any other party or for any other purpose without the written consent of the State of Victoria through DEPI.

[20] This research was led by Fiona McKenzie, from the Victorian Government's Department of Planning and Community Development.

[21] The overarching framework used in Schirmer and Mylek (2013) to understand the vulnerability of communities (or businesses) was described in Section 7 of Part 1 of that report and is repeated below:

Vulnerability = ƒ(exposure, sensitivity, adaptive capacity)

used in this study, the way in which the remaining four capitals have been operationalised was adapted from ABARE-BRS (2010) and expanded and modified to reflect novel empirical research conducted for DEPI in 2012 (forthcoming).

The ABARE-BRS (2010) study sought to identify measures available from the ABS Census that might serve as indicators of adaptive capacity, then subjected these to Principal Component Analysis (PCA) in order to determine which of these measures best explained the variation among the measures and towns examined. This useful process eliminated redundancy between a number of variables, and thereby enabled some variables to be dropped from the index. Removing unnecessary or low-value measures is an important exercise when building an AC index, because during aggregation minor measures otherwise 'dilute' the influence of more important ones.

The index created for this study made use of the final set of measures recommended by ABARE-BRS (2010), but modified as follows:

- We did not use the specific factors generated by the ABARE-BRS PCA. Rather, we used the original measures which the PCA indicated best explained the variation among the towns and measures examined.
- ABARE-BRS (2010) classified the measures which they examined as indicators of human capital or social capital (with economic diversity used as the sole proxy for financial capital). In our index we have reclassified some of their measures under different capitals, and have reinstated the physical and financial capitals. For example, where ABARE-BRS had characterised 'median weekly rent as a fraction of the Australian median' as a measure of human capital, we considered that it was more useful as a measure of financial capital, and reclassified it accordingly. Some measures, it should be noted, can act as proxies for more than one capital.
- Some of the measures originally included by ABARE-BRS were removed, on the basis that their relationship to adaptive capacity was insufficiently compelling (e.g. '% employed in the public sector'), or because the measure appeared to have multiple but contradictory relationships to adaptive capacity (e.g. '% living at a different address one year ago', since high mobility may increase the adaptive capacity of individuals, but decrease it for towns).
- A number of measures which were not originally included in the ABARE-BRS analysis were added, on the basis that the DEPI study (2013) and the wider research literature indicated they were important to adaptive capacity. These new measures helped to populate the reinstated capitals (physical and financial), and included ABS Census and other data as described below.
- All of the measures were weighted on the basis of discussion among Schirmer, EconSearch and DEPI of the research literature and the 2012 DEPI study. The weightings

In this framework, the concept of 'exposure' represents the extent to which a community's is subjected to any changes in the availability of natural resource, and is therefore to a significant extent a proxy for 'natural capital' as it applies to forest resources.

are by no means the only valid approach, and alternative weightings could be equally (or more) valid. However it was felt that, on balance, the weighting adopted gave appropriate precedence to those measures whose robustness and relevance appeared greatest, while retaining more minor but nonetheless worthwhile measures.

- Individual measures in this AC index were normalised using z-transformation prior to being weighted and aggregated; first into subindices (for each capital), and then into the final index. This was necessary because some of the new measures in the final index were not commensurable with others, and therefore could not be aggregated in their original form. For example, whereas the value of the measures already included in the ABARE index ranged in magnitude from 0 to 100 (enabling direct aggregation), some newly introduced measures had very different ranges (e.g. population size, remoteness). A further advantage of using Z-transformation was to cast the index and subindex scores into a form which facilitates easy interpretation relative to all Victorian towns. For this last reason, the final aggregate AC score was again subjected to z-transformation, to re-establish it as a proper z-score and thereby enable easy interpretation.

Data for the sub-indices have been sourced from the Australian Bureau of Statistics' (ABS) *Census of Housing and Population,* the Public Health Information Development Unit *Social Health Atlas of Australia* and the *Accessibility/Remoteness Index of Australia (ARIA)* constructed by the Australian Population and Migration Research Centre at the University of Adelaide. The index was constructed using the ABS LGA geography.

Each sub-index of the community adaptive capacity index is briefly described below.

Physical capital

The physical capital index has four components (ARIA, population size, population change and internet access), as described below.

Remoteness – measured by ARIA++ is an index of remoteness derived from measures of road distances between populated localities and Service Centres. These road distance measures are then used to generate a remoteness score for any location in Australia. It is a continuous varying index with values ranging from 0 (high accessibility) to 18 (high remoteness), based on road distance measurements from over 12,000 populated localities to the nearest Service Centres in five categories based on population size. The five distance measurements, one to each level of Service Centre, is recorded for each populated locality and standardized to a ratio.

Population size – the population recorded for each locality (2011) standardised to a ratio based on the mean population of localities in the set (e.g. LGAs in South Australia).

Population change – the rate of population change recorded for each locality (2006 to 2011) standardised to a ratio based on the median rate of population change calculated for localities in the set (e.g. LGAs in South Australia).

Internet access - the proportion of households with an intent connection for each locality (2011) standardised to a ratio based on the proportion for South Australia.

Economic capital

The economic capital index has five components (economic diversity, median household income, income/housing cost, unemployment and mean household size), as described below.

Economic diversity – an index calculated from industry of employment data available from the ABS *Census of Population and Housing* and is based on the Hachman Index described in Moore (2001). For this study it was calculated spatially at the LGA level and at the industry level using two-digit ANZSIC code employment data.

The Hachman Index is calculated, for a given locality, as the inverse of the weighted sum, across all industries, of the ratio of the share of a locality's employment in a given industry to the share of the state's employment in the same industry. The weights are the share of a locality's employment in a given industry.

Localities which have a large portion of employment in a few key industries, which differ considerably from the portion of employment for those industries state-wide, will have a relatively low Hachman Index value. Conversely, those localities which more closely reflect the state-wide employment distribution will have a relatively high Hachman Index value.

The Hachman Index is defined as:

$$HI = 1 \Big/ \sum_j (emp\ share_{LGAj} \times \frac{emp\ share_{LGAj}}{emp\ share_{statej}})$$

where:

$emp\ share_{UCLj}$: the share of the LGA's employment in industry j; and

$emp\ share_{statej}$: the share of the state's employment in industry j.

Median household income – calculated as the median household income for each locality standardised to a ratio based on the median for South Australia.

Income/housing cost - the household income to mortgage differential calculated as (median household weekly income * 52 / 12) – (median monthly housing loan repayment) for each locality standardised to a ratio based on the median for South Australia.

Unemployment - calculated as (total unemployed) / (total labour force) for each locality standardised to a ratio based on the unemployment rate for South Australia.

Mean household size – calculated as average number of persons per household for each locality standardised to a ratio based on average household size for South Australia.

Human capital

The human capital index has six components (percentage graduates, population 65+, percentage completed high school, one parent households, lone person households and females in non-routine occupations), as described below.

Percentage graduates – calculated as (total persons with a bachelor degree + total graduate diploma or certificate) / (total persons 15+) for each locality standardised to a ratio based on the percentage for South Australia.

Percentage 65 and over – calculated as (total persons aged 65 and over) / (total persons) for each locality standardised to a ratio based on the percentage for South Australia.

Percentage completed high school – calculated as (number of persons aged 15 and over to have completed high school) / (total persons aged 15 and over) for each locality standardised to a ratio based on the percentage for South Australia.

Percentage one parent – calculated as (total single parent families) / (total families) for each locality standardised to a ratio based on the percentage for South Australia.

Percentage lone person households – calculated as (total one person households) / (total occupied dwellings) for each locality standardised to a ratio based on the percentage for South Australia.

Proportion of females in non-routine occupations – calculated as (female managers + female professionals + female technicians + female community and personal) / (total female employed persons) for each locality standardised to a ratio based on the proportion for South Australia.

Social capital

The social capital index is comprised of a single indicator, voluntary work, as described below.

Percentage voluntary work – calculated as (total volunteers) / (total persons aged 15 and over) for each locality standardised to a ratio based on the percentage for South Australia.

Social Health Atlas of Australia data on community strength - calculated as the simple average of the following measures of community strength:

- Can you get help from family, friends or neighbours when you need it?
- Are you a member of an organised sport or church or community group in your local area?
- If you have school aged children, are you actively involved with activities in their school?

Once the scores were derived by the processes briefly described above, they were then transformed in three ways. First they were standardised using the z transformation. This means that each indicator is transformed so that the set of values for an indicator has a mean of zero and a standard deviation of one.

Second, each indicator was weighted to reflect its relative importance. The weights across all indicators must sum to 100 per cent.

Thirdly, each indicator was assigned a polarity (+1 or -1) which simply indicates whether the indicator is expected to have a positive or negative influence on the adaptive capacity of a locality.

The weighting and polarity of each of the components that comprise the community adaptive capacity index are provided in Appendix Table 2-1. The weighting and polarity values were developed by the Victorian Department of Environment and Primary Industries (DEPI), Dr Jacki Schirmer and EconSearch.

Appendix Table 2-1 Weighting and polarity of community adaptive capacity index components

	Weighting (%)	Polarity (1=pos, -1=neg)
PHYSICAL CAPITAL (25%)		
Remoteness (ARIA)	10	-1
Population size	5	1
Population change	5	1
Internet access as a fraction of South Australia	5	1
ECONOMIC CAPITAL (36%)		
Economic diversity	5	1
Median household income as fraction of the South Australian median	7	1
Income/housing cost as a fraction of the South Australian median	11	1
Unemployment as fraction of the South Australian rate	11	-1
Mean household size as fraction of the South Australian mean	2	-1
HUMAN CAPITAL (25%)		
Graduates as a fraction of South Australia	5	1
65 over as a fraction of South Australia	4	-1
Completed high school as a fraction of South Australia	5	1
One parent as a fraction of South Australia	5	-1
Lone persons households as a fraction of South Australia	3	-1
Proportion of females in non-routine occupations as a fraction of South Australia	3	1
SOCIAL CAPITAL (4%)		
Voluntary work as a fraction of South Australia	4	1
Community strength	10	1
TOTAL (ALL CAPITALS)	**100**	

APPENDIX 3 AN OVERVIEW OF ECONOMIC IMPACT ANALYSIS USING THE INPUT-OUTPUT METHOD

Economic impact analysis based on an input-output (I-O) model provides a comprehensive economic framework that is extremely useful in the resource planning process. Broadly, there are two ways in which the I-O method can be used.

First, the I-O model provides a numerical picture of the size and shape of an economy and its essential features. The I-O model can be used to describe some of the important features of an economy, the interrelationships between sectors and the relative importance of the individual sectors.

Second, I-O analysis provides a standard approach for the estimation of the economic impact of a particular activity. The I-O model is used to calculate industry multipliers that can then be applied to various development or change scenarios.

The input-output database

Input-output analysis, as an accounting system of inter-industry transactions, is based on the notion that no industry exists in isolation. This assumes, within any economy, each firm depends on the existence of other firms to purchase inputs from, or sell products to, for further processing. The firms also depend on final consumers of the product and labour inputs to production. An I-O database is a convenient way to illustrate the purchases and sales of goods and services taking place in an economy at a given point in time.

As noted above, I-O models provide a numerical picture of the size and shape of the economy. Products produced in the economy are aggregated into a number of groups of industries and the transactions between them recorded in the transactions table. The rows and columns of the I-O table can be interpreted in the following way:

- The rows of the I-O table illustrate sales for intermediate usage (i.e. to other firms in the region) and for final demand (e.g. household consumption, exports or capital formation).
- The columns of the I-O table illustrate purchases of intermediate inputs (i.e. from other firms in the region), imported goods and services and purchases of primary inputs (i.e. labour, land and capital).
- Each item is shown as a purchase by one sector and a sale by another, thus constructing two sides of a double accounting schedule.

In summary, the I-O model can be used to describe some of the important features of a state or regional economy, the interrelationships between sectors and the relative importance of the

individual sectors. The model is also used for the calculation of sector multipliers and the estimation of economic impacts arising from some change in the economy.

Using input-output analysis for estimation of economic impacts

The I-O model conceives the economy of the region as being divided up into a number of sectors and this allows the analyst to trace expenditure flows. To illustrate this, consider the example of a vineyard that, in the course of its operation, purchases goods and services from other sectors. These goods and services would include fertiliser, chemicals, transport services, and, of course, labour. The direct employment created by the vineyard is regarded in the model as an expenditure flow into the household sector, which is one of several non-industrial sectors recognised in the I-O model.

Upon receiving expenditure by the vineyard, the other sectors in the regional economy engage in their own expenditures. For example, as a consequence of winning a contract for work with vineyard, a spraying contractor buys materials from its suppliers and labour from its own employees. Suppliers and employees in turn engage in further expenditure, and so on. These indirect and induced (or flow-on) effects22, as they are called, are part of the impact of the vineyard on the regional economy. They must be added to the direct effects (which are expenditures made in immediate support of the vineyard itself) in order to arrive at a measure of the total impact of the vineyard.

It may be thought that these flow-on effects (or impacts) go on indefinitely and that their amount adds up without limit. The presence of leakages, however, prevents this from occurring. In the context of the impact on a regional economy, an important leakage is expenditure on imports, that is, products or services that originate from outside the region, state or country (e.g. machinery).

Thus, some of the expenditure by the vineyard (i.e. expenditure on imports to the region) is lost to the regional economy. Consequently, the flow-on effects get smaller and smaller in successive expenditure rounds due to this and other leakages. Hence the total expenditure created in the regional economy is limited in amount, and so (in principle) it can be measured.

Using I-O analysis for estimation of regional economic impacts requires a great deal of information. The analyst needs to know the magnitude of various expenditures and where they occur. Also needed is information on how the sectors receiving this expenditure share their expenditures among the various sectors from whom they buy, and so on, for the further expenditure rounds.

In applying the I-O model to economic impact analysis, the standard procedure is to determine the direct or first-round expenditures only. No attempt is made to pursue such inquiries on expenditure in subsequent rounds, not even, for example, to trace the effects in the regional economy on household expenditures by vineyard employees on food, clothing, entertainment,

[22] A glossary of I-O terminology is provided in Appendix 3.

and so on, as it is impracticable to measure these effects for an individual case, here the vineyard.

The I-O model is instead based on a set of assumptions about constant and uniform proportions of expenditure. If households in general in the regional economy spend, for example, 13.3 per cent of their income on food and non-alcoholic beverages, it is assumed that those working in vineyards do likewise. Indeed, the effects of all expenditure rounds after the first are calculated by using such standard proportions (i.e. multiplier calculations). Once a transactions table has been compiled, simple mathematical procedures can be applied to derive multipliers for each sector in the economy.

Input-output multipliers

Input-output multipliers are an indication of the strength of the linkages between a particular sector and the rest of the state or regional economy. As well, they can be used to estimate the impact of a change in that particular sector on the rest of the economy.

Detailed explanations on calculating I-O multipliers, including the underlying assumptions, are provided in any regional economics or I-O analysis textbook (see, for example, Jensen and West (1986)). They are calculated through a routine set of mathematical operations based on coefficients derived from the I-O transactions model, as outlined below.

The transactions table may be represented by a series of equations thus:

$$X_1 = X_{11} + X_{12} + \ldots\ldots\ldots\ldots\ldots + X_{1n} + Y_1$$
$$X_2 = X_{21} + X_{22} + \ldots\ldots\ldots\ldots\ldots + X_{2n} + Y_2$$
$$X_n = X_{n1} + X_{n2} + \ldots\ldots\ldots\ldots\ldots + X_{nn} + Y_n$$

where X_i = total output of intermediate sector *i* (row totals);

X_{ij} = output of sector *i* purchased by sector *j* (elements of the intermediate quadrant); and

Y_j = total final demand for the output of sector *i*.

It is possible, by dividing the elements of the columns of the transactions table by the respective column totals to derive coefficients, which represent more clearly the purchasing pattern of each sector. These coefficients, termed 'direct' or 'I-O' coefficients, are normally denoted as aij, and represent the direct or first round requirements from the output of each sector following an increase in output of any sector.

In equation terms the model becomes:

$$X_1 = a_{11}X_1 + a_{12}X_2 + \ldots\ldots\ldots\ldots\ldots + a_{1n}X_n + Y_1$$
$$X_2 = a_{21}X_1 + a_{22}X_2 + \ldots\ldots\ldots\ldots\ldots + a_{2n}X_n + Y_2$$
$$X_n = a_{n1}X_{11} + a_{n2}X_2 + \ldots\ldots\ldots\ldots\ldots + a_{nn}X_n + Y_n$$

where a_{ij} (the direct coefficient) = X_{ij}/X_j. This may be represented in matrix terms:

$X = AX + Y$

where A = $[a_{ij}]$, the matrix of direct coefficients.

The previous equation can be extended to:

$(I\text{-}A)X = Y$

where $(I\text{-}A)$ is termed the Leontief matrix,

or $X = (I\text{-}A)^{-1}Y$

where $(I\text{-}A)^{-1}$ is termed the 'general solution', the 'Leontief inverse' or simply the inverse of the open model.

The general solution is often represented by:

$Z = (I\text{-}A)^{-1} = [z_{ij}]$

The I-O table can be 'closed' with respect to certain elements of the table. Closure involves the transfer of items from the exogenous portions of the table (final demand and primary input quadrants) to the endogenous section of the table (intermediate quadrant). This implies that the analyst considers that the transferred item is related more to the level of local activity than to external influences. Closure of I-O tables with respect to households is common and has been adopted in this project.

The 'closed' direct coefficients matrix may be referred to as A^*. The inverse of the Leontief matrix formed from A^* is given by:

$Z^* = (I\text{-}A^*)^{-1} = [z^*_{ij}]$

Z^* is referred to as the 'closed inverse' matrix.

A multiplier is essentially a measurement of the impact of an economic stimulus. In the case of I-O multipliers the stimulus is normally assumed to be an increase of one dollar in sales to final demand by a sector. The impact in terms of output, contribution to gross regional product, household income and employment can be identified in the categories discussed below.

(i) The initial impact: refers to the assumed dollar increase in sales. It is the stimulus or the cause of the impacts. It is the unity base of the output multiplier and provides the identity matrix of the Leontief matrix. Associated directly with this dollar increase in output is an

own-sector increase in household income (wages and salaries, drawings by owner operators etc.) used in the production of that dollar. This is the household income coefficient h_j. Household income, together with other value added (OVA), provide the total gross regional product from the production of that dollar of output. The gross regional product coefficient is denoted v_j. Associated also will be an own-sector increase in employment, represented by the size of the employment coefficient. This employment coefficient e_j represents an employment/output ratio and is usually calculated as 'employment per million dollars of output'.

(ii) The first round impact: refers to the effect of the first round of purchases by the sector providing the additional dollar of output. In the case of the output multiplier this is shown by the direct coefficients matrix [a_{ij}]. The disaggregated effects are given by individual a_{ij} coefficients and the total first-round effect by Σa_{ij}. First-round household income effects are calculated by multiplying the first-round output effects by the appropriate household income coefficient (h_j). Similarly, the first-round gross regional product and employment effects are calculated by multiplying the first-round output effects by the appropriate gross regional product (v_j) and employment (e_j) coefficients.

(iii) Industrial-support impacts. This term is applied to 'second and subsequent round' effects as successive waves of output increases occur in the economy to provide industrial support, as a response to the original dollar increase in sales to final demand. The term excludes any increases caused by increased household consumption. Output effects are calculated from the open Z inverse, as a measure of industrial response to the first-round effects. The industrial-support output requirements are calculated as the elements of the columns of the Z inverse, less the initial dollar stimulus and the first-round effects. The industrial support household income, gross regional product and employment effects are defined as the output effects multiplied by the respective household income, gross regional product and employment coefficients. The first-round and industrial-support impacts are together termed the production-induced impacts.

(iv) Consumption-induced impacts: are defined as those induced by increased household income associated with the original dollar stimulus in output. The consumption-induced output effects are calculated in disaggregated form as the difference between the corresponding elements in the open and closed inverse (i.e. $z^*_{ij} - z_{ij}$, and in total as $\Sigma(z^*_{ij} - z_{ij})$. The consumption-induced household income, gross regional product and employment effects are simply the output effects multiplied by the respective household income, gross regional product and employment coefficients.

(v) Flow-on impacts: are calculated as total impact less the initial impact. This allows for the separation of 'cause and effect' factors in the multipliers. The cause of the impact is given by the initial impact (the original dollar increase in sales to final demand), and the effect is represented by the first-round, industrial-support and consumption-induced effects, which together constitute the flow-on effects.

Each of the five impacts are summarised in Appendix Table 2.1. It should be noted that household income, gross regional product and employment multipliers are parallel concepts, differing only by their respective coefficients h_j, v_j and e_j.

The output multipliers are calculated on a 'per unit of initial effect' basis (i.e. output responses to a one dollar change in output). Household income, gross regional product and employment multipliers, as described above, refer to changes in household income per initial change in output, changes to gross regional product per initial change in output and changes in employment per initial change in output. These multipliers are conventionally converted to ratios, expressing a 'per unit' measurement, and described as Type I and Type II ratios. For example, with respect to employment:

Type I employment ratio = [initial + first round + industrial support]/initial

and

Type II employment ratio = [initial + production induced[23] + consumption induced]/initial

Model assumptions

There are a number of important assumptions in the I-O model that are relevant in interpreting the analytical results.

- Industries in the model have a linear production function, which implies constant returns to scale and fixed input proportions.
- Another model assumption is that firms within a sector are homogeneous, which implies they produce a fixed set of products that are not produced by any other sector and that the input structure of the firms are the same. Thus it is preferable to have as many sectors as possible specified in the models and the standard models for this study were compiled with 66 sectors (see Appendix 1 for further detail).
- The model is a static model that does not take account of the dynamic processes involved in the adjustment to an external change, such as a permanent change in natural resources management.

[23] Where (first round + industrial support) = production induced.

Appendix Table 2.1 The structure of input-output multipliers for sector *i* [a]

Impacts	General formula
Output multipliers ($)	
Initial	1
First-round	$\Sigma_i a_{ij}$
Industrial-support	$\Sigma_i z_{ij}$-1-$\Sigma_i a_{ij}$
Consumption-induced	$\Sigma_i z^*_{ij}$-$\Sigma_i z_{ij}$
Total	$\Sigma_i z^*_{ij}$
Flow-on	$\Sigma_i z^*_{ij}$-1
Household Income multipliers ($)	
Initial	h_j
First-round	$\Sigma_i a_{ij} h_i$
Industrial-support	$\Sigma_i z_{ij} h_i$- h_j-$\Sigma_i a_{ij} h_i$
Consumption-induced	$\Sigma_i z^*_{ij} h_i$-$\Sigma_i z_{ij} h_i$
Total	$\Sigma_i z^*_{ij} h_i$
Flow-on	$\Sigma_i z^*_{ij} h_i$-h_j
Gross regional product multipliers ($)	
Initial	v_j
First-round	$\Sigma_i a_{ij} v_i$
Industrial-support	$\Sigma_i z_{ij} v_i$- v_j-$\Sigma_i a_{ij} v_i$
Consumption-induced	$\Sigma_i z^*_{ij} v_i$-$\Sigma_i z_{ij} v_i$
Total	$\Sigma_i z^*_{ij} v_i$
Flow-on	$\Sigma_i z^*_{ij} v_i$-v_j
Employment multipliers (full time equivalents)	
Initial	e_j
First-round	$\Sigma_i a_{ij} e_i$
Industrial-support	$\Sigma_i z_{ij} e_i$- e_j-$\Sigma_i a_{ij} e_i$
Consumption-induced	$\Sigma_i z^*_{ij} e_i$-$\Sigma_i z_{ij} e_i$
Total	$\Sigma_i z^*_{ij} e_i$
Flow-on	$\Sigma_i z^*_{ij} e_i$-e_j

[a] In a DECON model, Z^* (the 'closed inverse' matrix), includes a population and an unemployed row and column (see below for details).

Extending the standard economic impact model as a DECON model

Based on work undertaken by EconSearch (2009 and 2010a) and consistent with Mangan and Phibbs (1989), the I-O model developed for this project was extended as demographic-economic (DECON) model. The two key characteristics of the DECON model, when compared with a standard economic model, are as follows.

1. The introduction of a population 'sector' (or row and column in the model) makes it possible to estimate the impact on local population levels of employment growth or decline.
2. The introduction of an unemployed 'sector' makes it possible to account for the consumption-induced impact of the unemployed in response to economic growth or decline.

The population 'sector'

The introduction of a population 'sector' to the standard I-O model allows for the calculation of population multipliers. These multipliers measure the flow-on population impact resulting from an initial population change attributable to employment growth or decline in a particular sector of the regional economy.

Calculation of population multipliers is made possible by inclusion of a population row and column in the 'closed' direct coefficients matrix of the I-O model.

Population row: the population coefficient (pj) for sector j of the DECON model is represented as:

$p_j = -rho_j * e_j * family\ size_j$

where rho_j = the proportion of employees in sector *j* who remain in the region after they lose their job (negative employment impact) or the proportion of new jobs in sector *j* filled by previously unemployed locals (positive employment impact);

e_j = the employment coefficient for sector *j*; and

$family\ size_j$ = average family size for sector *j.*

Population column: the population column of the DECON model is designed to account for growth or decline in those sectors of the economy that are primarily population-driven (i.e. influenced by the size of the population) rather than market-driven (i.e. dependent upon monetary transactions). Clearly, many of the services provided by the public sector fit this description and, for the purpose of this analysis, it was assumed that the following intermediate sectors were primarily population-driven:

- public administration and defence
- education
- health and community services

- cultural and recreational services.

Thus, the non-market coefficient for sector j of the DECON model is represented as expenditure on that non-market service (by governments) in $million per head of population.

The population multiplier for sector *j* is represented as: z^*_{pj} / p_{pj}

where z^*_{pj} = coefficient of the 'closed inverse' matrix in the population row for sector *j*; and

p_{pj} = coefficient of the direct coefficients matrix in the population row for sector *j.*

Sources of local data for the population sector of the DECON models used in this project included the following.

- rho: little or no published data are available to assist with estimation of this variable, particularly at a regional level. The DECON models have been constructed to enable the analyst to estimate this variable on the basis of the availability superior data or assumptions.
- Family size: in order to estimate average family size by industry, relevant data were extracted from the Australian Bureau of Statistics 2011 Census of Population and Housing using the TableBuilder database. These data were modified by the consultants in order to ensure consistency with the specification and conventions of the I-O models.

The unemployed 'sector'

As outlined above, the introduction of an unemployed 'sector' to the standard I-O model makes it possible to account for the consumption-induced impact of the unemployed in response to economic growth or decline.

Through the inclusion of an unemployed row and column in the 'closed' direct coefficients matrix of the standard I-O model it is possible to calculate Type III multipliers (for output, gross regional product, household income and employment).

The key point to note is that, in the situation where at least some of the unemployed remain in a region after losing their job (negative employment impact) or some of the new jobs in a region are filled by previously unemployed locals (positive employment impact), Type III multipliers will be smaller than the more frequently used Type II multipliers.

Unemployed row: the unemployed coefficient (u_j) for sector *j* of the DECON model is represented as:

$u_j = -\text{rho}_j * (1-ess_j) * e_j$

where rho_j = the proportion of employees in sector *j* who remain in the region after they lose their job (negative employment impact) or the proportion of new jobs in sector *j* filled by previously unemployed locals (positive employment impact);

ess_j = the proportion of employed in sector *j* who are not eligible for welfare benefits when they lose their job*; and*

e_j = the employment coefficient for sector *j*.

Unemployed column: the unemployed column of the DECON model is an approximation of total consumption expenditure and the consumption pattern of the unemployed. It is represented as dollars per unemployed person rather than $million for the region as a whole, as is the case for the household expenditure column in a standard I-O model.

Sources of local (i.e. state and regional) data for the unemployed sector of the DECON models used in this study included the following.

- ess: in order to estimate the proportion of employed by industry who are not eligible for welfare benefits when they lose their job, relevant data were were extracted from the Australian Bureau of Statistics 2011 Census of Population and Housing using the TableBuilder database. These data were modified by the consultants in order to ensure consistency with the specification and conventions of the I-O models.
- Unemployed consumption: total consumption expenditure by the unemployed was based on an estimate of the Newstart Allowance whilst the pattern of consumption expenditure was derived from household income quintiles in the 2009/10 Household Expenditure Survey (ABS 2011).

Incorporating a tourism demand profile in the I-O model

Tourism expenditure is a measure of the value of sales of goods and services to visitors to the state or region. The following method and data sources were used to estimate tourism expenditure by industry sector for the region.

- The primary data were sourced from Tourism Research Australia (TRA).
- Base datasets included total tourism expenditure by TRA tourism region and average expenditure profiles, by region, across a range of goods and services (e.g. food and drink, fuel, shopping, etc.).
- Estimates were available for domestic day, domestic overnight and international visitor expenditure.
- The first adjustment to the base data was the development of a concordance between the TRA tourism regions and I-O model regions and the allocation of these base data to the relevant I-O model region. These allocations were based, in turn, on an ABS concordance between TRA tourism regions and SLAs.
- The second adjustment to the base data was the application of a more detailed expenditure breakdown from the ABS Australian National Accounts: Tourism Satellite Account for both domestic and international visitor expenditure (ABS 2010d).
- The third adjustment to the base data was the conversion of tourism expenditure estimates from purchasers' to basic prices (i.e. reallocation of net taxes (taxes minus subsidies) and marketing and transport margins) to make the data consistent with

accounting conventions used in the national, state and regional I-O models. Purchasers' to basic price ratios for tourism expenditure categories were derived from ABS data.

- The final adjustment to the base data was the allocation of the tourism expenditure data in basic prices to the relevant input-output sectors (intermediate sectors, taxes less subsidies or imports) in which the expenditure occurred, thus compiling a profile of sales to final demand. This process was undertaken for each type of tourism expenditure (domestic day, domestic overnight and international visitor) and the results aggregated to form a single tourism demand profile. Profiles were developed at the state and regional levels.

Constructing a RISE v3.0 economic impact model

In the final model construction stage the data described above were incorporated into a *Microsoft Excel®* spreadsheet based economic impact model for the region and state (i.e. *RISE v3.0*)[24]. This model allows for description of the structure of the economy. It can also be used for the estimation of economic impacts over time in response to the introduction of a new industry or a change in the final demand for the output of one or many sectors. Model assumptions can be modified to account for:

- price changes between the model construction year (2009/10) and the base year for the analysis
- labour productivity change over time (as above and for the subsequent years)
- the level of regional migration (e.g. for a positive employment impact, the proportion of new jobs filled by previously unemployed locals).

[24] For further details on the use and application of this type of model see EconSearch (2010b).

APPENDIX 4 GLOSSARY OF INPUT-OUTPUT TERMINOLOGY

Basic price is the price received for a good or service by the producer. It is also known as the producers' price. It excludes indirect taxes and transport, trade and other margins.

Changes in inventories (stocks) "consist of stocks of outputs that are held at the end of a period by the units that produced them prior to their being further processed, sold, delivered to other units or used in other ways and stocks of products acquired from other units that are intended to be used for intermediate consumption or for resale without further processing" (ABS 2015).

Consumption-induced impacts are additional output and employment resulting from re-spending by households that receive income from employment in direct and indirect activities. Consumption-induced effects are sometimes referred to as 'induced effects'.

DECON model is a demographic-economic model based on a traditional input-output model. The introduction of a population 'sector' (or row and column in the model) makes it possible to estimate the impact on local population levels of employment growth or decline. The introduction of an unemployed 'sector' makes it possible to account for the consumption-induced impact of the unemployed in response to economic growth or decline**.**

Direct (or initial) impacts are an estimate of the change in final demand or level of economic activity that is the stimulus for the total impacts.

Employment is a measure of the number of working proprietors, managers, directors and other employees, in terms of the number of full-time equivalents and total (i.e. full-time and part-time) jobs. Employment is measured by place of remuneration rather than place of residence.

ess is an estimate of the proportion of employed who are not eligible for welfare benefits when they lose their job.

Exports (other) are a measure of the value of goods and services sold from the region/state of interest to consumers in other regions, interstate and overseas, net of sales to visitors to the region.

Final demand quadrant (components of) includes household and government consumption expenditure, gross fixed capital formation, changes in inventories (stocks), tourism expenditure and 'other' exports.

First-round impacts are estimates of the requirement for (or purchases of) goods and services from other sectors in the economy generated by the initial economic activity.

Flow-on impacts are the sum of production-induced impacts, consumption-induced impacts and offsetting consumption effects.

Government consumption expenditure includes "net expenditure on goods and services by public authorities, other than those classified as public corporations, which does not result in the creation of fixed assets or inventories or in the acquisition of land and existing buildings or second-hand assets. It comprises expenditure on compensation of employees (other than those

charged to capital works, etc.), goods and services (other than fixed assets and inventories) and consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees, etc., charged by general government bodies for goods sold and services rendered are offset against purchases. Net expenditure overseas by general government bodies and purchases from public corporations are included. Expenditure on defence assets that are used in a fashion similar to civilian assets is classified as gross fixed capital formation; expenditure on weapons of destruction and weapon delivery systems is classified as final consumption expenditure" (ABS 2015).

Gross fixed capital formation (GFCF) includes government, private and public corporation expenditure on new fixed assets plus net expenditure on second-hand fixed assets, including both additions and replacements.

Gross operating surplus and gross mixed income. Gross operating surplus (GOS) is a measure of the operating surplus accruing to all enterprises, except unincorporated enterprises. It is the excess of gross output over the sum of intermediate consumption, household income and taxes less subsidies on production and imports. Gross mixed income (GMI) is a measure of the surplus or deficit accruing from production by unincorporated enterprises. The National Accounts definition of this indicator, as specified in the 2004/05 National IO table, includes drawings by owner operators (or managers). In the state model used in this project, drawings by owner operators have been included in household income.

Gross regional/state product (GRP/GSP) is a measure of the net contribution of an activity to the regional/state economy. 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 the sum of household income, 'gross operating surplus and gross mixed income net of payments to owner managers' and 'taxes less subsidies on products and production'. It represents payments to the primary inputs of production (labour, capital and land). Using GRP/GSP as a measure of economic impact avoids the problem of double counting that may arise from using value of output for this purpose.

Household consumption expenditure includes "net expenditure on goods and services by persons and expenditure of a current nature by private non-profit institutions serving households. This item excludes expenditures by unincorporated businesses and expenditures on assets by non-profit institutions (included in gross fixed capital formation). Also excluded is expenditure on maintenance of dwellings (treated as intermediate expenses of private enterprises), but personal expenditure on motor vehicles and other durable goods and the imputed rent of owner-occupied dwellings are included. The value of 'backyard' production (including food produced and consumed on farms) is included in household final consumption expenditure and the payment of wages and salaries in kind (e.g. food and lodging supplied free to employees) is counted in both household income and household final consumption expenditure" (ABS 2015).

Household income is a component of GRP/GSP and is a measure of wages and salaries paid in cash and in-kind, drawings by owner operators and other payments to labour including overtime payments, employer's superannuation contributions and income tax, but excluding payroll tax.

Imports are a measure of the value of goods and services purchased by intermediate sectors and by components of final demand in the region/state of interest from other regions, interstate and overseas.

Industrial-support impacts are output and employment resulting from second, third and subsequent rounds of spending by firms.

Input-output analysis is an accounting system of inter-industry transactions based on the notion that no industry exists in isolation.

Input-output model is a transactions table that illustrates and quantifies the purchases and sales of goods and services taking place in an economy at a given point in time. It provides a numerical picture of the size and shape of the economy and its essential features. Each item is shown as a purchase by one sector and a sale by another, thus constructing two sides of a double accounting schedule.

Multiplier is an index (ratio) indicating the overall change in the level of activity that results from an initial change in economic activity. They are an indication of the strength of the linkages between a particular sector and the rest of the state or regional economy. They can be used to estimate the impact of a change in that particular sector on the rest of the economy.

Offsetting consumption effects are 'lost' consumption expenditure by the local unemployed before taking a job or 'new' consumption expenditure of those losing a job as they shift to welfare payments.

Output (Value of) is a measure of the gross revenue of goods and services produced by commercial organisations (e.g. farm-gate value of production) and gross expenditure by government agencies. Total output needs to be used with care as it can include elements of double counting when the output of integrated industries is added together (e.g. the value of winery output includes the farm-gate value of grapes). For sectors where superior regional data are not available, value of output by industry is allocated across regions on an employment basis, rather than in terms of the location of other factors of production such as land and capital.

Purchasers' price is the price paid for a good or service paid by the purchaser. It includes indirect taxes and transport, trade and other margins.

Primary input quadrant (components of) includes household income, gross operating surplus and gross mixed income net of payments to owner managers, taxes less subsidies on products and production and imports.

Production-induced impacts are the sum of first-round and industrial support impacts. Production-induced impacts are sometimes referred to as 'indirect effects'.

rho is an estimate of the proportion of employees who remain in the region after they lose their job (negative employment impact) or the proportion of new jobs filled by previously unemployed locals (positive employment impact).

Taxes less subsidies on products and production (TLSPP) is defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. Taxes on products are taxes payable per unit of some good or service. Other taxes on production consist of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Subsidies on products are subsidies payable per unit of a good or service. Other subsidies on production consist of all subsidies, except subsidies on products, which resident enterprises may receive as a consequence of engaging in production.

Tourism expenditure is a measure of the value of sales of goods and services to visitors to the state or region.

Total impacts are the sum of initial (or direct) and flow-on impacts.

Type I multiplier is calculated as (direct effects + production-induced effects)/direct effects.

Type II multiplier is calculated as (direct effects + production-induced effects + consumption-induced effects)/direct effects.

Type III multiplier is a modified Type II multiplier, calculated by including a population and unemployed row and column in the 'closed' direct coefficients matrix of the standard IO model. Calculated as (direct effects + production-induced effects + consumption-induced effects + offsetting consumption effects)/direct effects.

APPENDIX 5 REGIONAL ECONOMIC STRUCTURE

Appendix Table 5-1 Employment, household income and household expenditure, Adelaide Hills and Fleurieu region, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	3,575	9.1%	3,681	10.5%	233	9.3%	65	1.6%
Mining	605	1.5%	890	2.5%	138	5.5%	2	0.0%
Manufacturing	3,917	9.9%	3,982	11.4%	255	10.2%	292	7.2%
Electricity, gas and water	649	1.6%	738	2.1%	62	2.5%	167	4.1%
Building and construction	3,333	8.5%	3,343	9.6%	282	11.3%	3	0.1%
Wholesale trade	691	1.8%	663	1.9%	72	2.9%	135	3.3%
Retail trade	5,238	13.3%	3,927	11.2%	213	8.5%	274	6.8%
Accommodation, cafes & restaurants	3,060	7.8%	2,123	6.1%	101	4.0%	148	3.7%
Transport and storage	1,206	3.1%	1,184	3.4%	111	4.4%	58	1.4%
Communication and publishing services	250	0.6%	219	0.6%	18	0.7%	18	0.4%
Finance and insurance	423	1.1%	371	1.1%	45	1.8%	56	1.4%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	632	15.7%
Rental Hiring Real Estate Services	560	1.4%	518	1.5%	55	2.2%	26	0.6%
Prof Scientific Tech Services	2,196	5.6%	1,796	5.1%	93	3.7%	6	0.1%
Admin Support Services	1,250	3.2%	848	2.4%	40	1.6%	4	0.1%
Public administration and defence	1,837	4.7%	1,968	5.6%	165	6.6%	5	0.1%
Education and training	3,365	8.5%	2,994	8.6%	221	8.8%	155	3.8%
Health and community services	5,062	12.8%	3,783	10.8%	296	11.8%	153	3.8%
Cultural and recreational services	399	1.0%	319	0.9%	31	1.2%	12	0.3%
Personal and other services	1,779	4.5%	1,600	4.6%	73	2.9%	58	1.4%
Total Intermediate	39,396	100.0%	34,948	100.0%	2,503	100.0%	2,268	56.2%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	282	7.0%
Imports	-	-	-	-	-	-	1,487	36.8%
Primary Inputs Total	-	-	-	-	-	-	1,769	43.8%
GRAND TOTAL	39,396	100.0%	34,948	100.0%	2,503	100.0%	4,037	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-2 Components of gross regional product in the Adelaide Hills and Fleurieu region by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	233	9.3%	336	22.6%	20	9.1%	589	12.9%
Mining	138	5.5%	122	8.2%	6	2.7%	266	5.8%
Manufacturing	255	10.2%	120	8.1%	23	10.5%	398	8.7%
Electricity, gas and water	62	2.5%	101	6.8%	18	8.2%	180	3.9%
Building and construction	282	11.3%	0	0.0%	10	4.5%	292	6.4%
Wholesale trade	72	2.9%	30	2.0%	5	2.4%	107	2.3%
Retail trade	213	8.5%	41	2.7%	11	5.2%	265	5.8%
Accommodation, cafes & restaurants	101	4.0%	24	1.6%	17	7.7%	141	3.1%
Transport and storage	111	4.4%	17	1.2%	9	4.1%	137	3.0%
Communication and publishing services	18	0.7%	13	0.9%	1	0.3%	31	0.7%
Finance and insurance	45	1.8%	107	7.2%	8	3.8%	160	3.5%
Ownership of dwellings [b]	0	0.0%	481	32.4%	53	24.5%	534	11.7%
Rental Hiring Real Estate Services	55	2.2%	41	2.7%	14	6.2%	109	2.4%
Prof Scientific Tech Services	93	3.7%	0	0.0%	3	1.4%	96	2.1%
Admin Support Services	40	1.6%	0	0.0%	2	1.0%	42	0.9%
Public administration and defence	165	6.6%	41	2.8%	6	2.6%	211	4.6%
Education and training	221	8.8%	6	0.4%	3	1.5%	231	5.1%
Health and community services	296	11.8%	0	0.0%	6	2.8%	302	6.6%
Cultural and recreational services	31	1.2%	3	0.2%	0	-0.1%	34	0.7%
Personal and other services	73	2.9%	2	0.2%	4	1.6%	79	1.7%
Total Intermediate	2,503	100.0%	1,485	100.0%	218	100.0%	4,206	91.9%
Net Taxes in Final Demand	-	-	-	-	-	-	369	8.1%
Gross Regional Product	-	-	-	-	-	-	4,575	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-3 Value of imports and exports by industry, Adelaide Hills and Fleurieu region, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	365	25.0%	365	18.2%	117	3.6%
Mining	0	0.0%	279	19.1%	279	14.0%	40	1.3%
Manufacturing	49	9.0%	395	27.1%	444	22.2%	249	7.7%
Electricity, gas and water	0	0.0%	21	1.5%	21	1.1%	66	2.0%
Building and construction	0	0.0%	100	6.8%	100	5.0%	99	3.1%
Wholesale trade	20	3.8%	19	1.3%	39	2.0%	44	1.4%
Retail trade	109	20.2%	5	0.3%	114	5.7%	49	1.5%
Accommodation, cafes & restaurants	89	16.5%	15	1.0%	104	5.2%	39	1.2%
Transport and storage	18	3.2%	20	1.4%	37	1.9%	52	1.6%
Communication and publishing services	0	0.0%	3	0.2%	3	0.1%	7	0.2%
Finance and insurance	0	0.0%	24	1.6%	24	1.2%	37	1.2%
Ownership of dwellings [b]	12	2.3%	41	2.8%	53	2.7%	79	2.4%
Rental Hiring Real Estate Services	7	1.4%	13	0.9%	20	1.0%	49	1.5%
Prof Scientific Tech Services	0	0.0%	5	0.3%	5	0.3%	12	0.4%
Admin Support Services	0	0.0%	2	0.1%	2	0.1%	14	0.4%
Public administration and defence	0	0.0%	22	1.5%	22	1.1%	49	1.5%
Education and training	1	0.2%	8	0.6%	9	0.5%	19	0.6%
Health and community services	0	0.0%	12	0.8%	12	0.6%	22	0.7%
Cultural and recreational services	14	2.7%	2	0.2%	17	0.8%	3	0.1%
Personal and other services	4	0.7%	2	0.1%	5	0.3%	16	0.5%
Total Intermediate	323	59.8%	1,352	92.7%	1,674	83.8%	1,063	32.9%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	41	7.6%	1	0.1%	42	2.1%	-	-
Imports	176	32.6%	106	7.2%	282	14.1%	-	-
Primary Inputs Total	217	40.2%	107	7.3%	324	16.2%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	1,487	46.0%
Government Expenditure	-	-	-	-	-	-	189	5.9%
Gross Fixed Capital	-	-	-	-	-	-	211	6.5%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	176	5.4%
Other Exports	-	-	-	-	-	-	106	3.3%
Final Demand Total	-	-	-	-	-	-	2,169	67.1%
GRAND TOTAL	540	100.0%	1,458	100.0%	1,998	100.0%	3,232	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-4 Employment, household income and household expenditure, Adelaide Hills, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	828	8.0%	854	9.3%	50	7.5%	15	1.2%
Mining	28	0.3%	29	0.3%	4	0.6%	0	0.0%
Manufacturing	961	9.3%	956	10.5%	58	8.7%	51	4.0%
Electricity, gas and water	183	1.8%	199	2.2%	17	2.6%	59	4.6%
Building and construction	967	9.4%	994	10.9%	92	13.7%	1	0.1%
Wholesale trade	188	1.8%	170	1.9%	19	2.8%	24	1.8%
Retail trade	1,242	12.0%	913	10.0%	54	8.1%	79	6.2%
Accommodation, cafes & restaurants	679	6.6%	448	4.9%	23	3.5%	35	2.7%
Transport and storage	257	2.5%	235	2.6%	23	3.4%	13	1.0%
Communication and publishing services	54	0.5%	51	0.6%	4	0.5%	1	0.1%
Finance and insurance	118	1.1%	88	1.0%	11	1.6%	7	0.6%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	205	16.0%
Rental Hiring Real Estate Services	117	1.1%	90	1.0%	10	1.5%	1	0.1%
Prof Scientific Tech Services	883	8.6%	713	7.8%	34	5.1%	2	0.2%
Admin Support Services	317	3.1%	211	2.3%	9	1.4%	0	0.0%
Public administration and defence	772	7.5%	923	10.1%	85	12.7%	2	0.2%
Education and training	1,001	9.7%	894	9.8%	72	10.8%	66	5.1%
Health and community services	1,115	10.8%	864	9.4%	71	10.6%	48	3.8%
Cultural and recreational services	159	1.5%	123	1.3%	11	1.7%	4	0.3%
Personal and other services	453	4.4%	392	4.3%	21	3.2%	19	1.5%
Total Intermediate	10,323	100.0%	9,147	100.0%	668	100.0%	632	49.3%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	90	7.0%
Imports	-	-	-	-	-	-	559	43.7%
Primary Inputs Total	-	-	-	-	-	-	649	50.7%
GRAND TOTAL	10,323	100.0%	9,147	100.0%	668	100.0%	1,281	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-5 Components of gross regional product in the Adelaide Hills by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	50	7.5%	97	24.7%	5	8.9%	152	12.4%
Mining	4	0.6%	4	1.1%	0	0.4%	8	0.7%
Manufacturing	58	8.7%	26	6.5%	5	8.8%	89	7.2%
Electricity, gas and water	17	2.6%	30	7.5%	4	7.3%	51	4.2%
Building and construction	92	13.7%	0	0.0%	3	5.8%	95	7.7%
Wholesale trade	19	2.8%	11	2.7%	1	2.6%	31	2.5%
Retail trade	54	8.1%	10	2.6%	3	5.2%	68	5.5%
Accommodation, cafes & restaurants	23	3.5%	4	1.0%	4	6.4%	31	2.5%
Transport and storage	23	3.4%	4	1.0%	2	3.4%	29	2.4%
Communication and publishing services	4	0.5%	2	0.6%	0	0.3%	6	0.5%
Finance and insurance	11	1.6%	16	4.1%	2	2.9%	28	2.3%
Ownership of dwellings [b]	0	0.0%	152	38.6%	17	30.4%	169	13.8%
Rental Hiring Real Estate Services	10	1.5%	6	1.6%	2	4.2%	19	1.5%
Prof Scientific Tech Services	34	5.1%	0	0.0%	1	1.9%	35	2.8%
Admin Support Services	9	1.4%	0	0.0%	1	0.9%	10	0.8%
Public administration and defence	85	12.7%	29	7.4%	2	4.4%	117	9.5%
Education and training	72	10.8%	0	0.0%	1	1.9%	73	5.9%
Health and community services	71	10.6%	0	0.0%	1	2.6%	72	5.9%
Cultural and recreational services	11	1.7%	1	0.2%	0	-0.5%	12	1.0%
Personal and other services	21	3.2%	1	0.3%	1	2.0%	24	1.9%
Total Intermediate	668	100.0%	394	100.0%	56	100.0%	1,118	91.1%
Net Taxes in Final Demand	-	-	-	-	-	-	109	8.9%
Gross Regional Product	-	-	-	-	-	-	1,227	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-6 Value of imports and exports by industry, Adelaide Hills, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	94	24.1%	94	19.3%	29	2.8%
Mining	0	0.0%	4	1.1%	4	0.9%	1	0.1%
Manufacturing	7	7.5%	147	37.6%	154	31.6%	77	7.4%
Electricity, gas and water	0	0.0%	16	4.0%	16	3.2%	32	3.1%
Building and construction	0	0.0%	50	12.9%	50	10.3%	49	4.7%
Wholesale trade	4	3.8%	5	1.2%	9	1.7%	10	1.0%
Retail trade	18	18.7%	5	1.4%	24	4.8%	14	1.3%
Accommodation, cafes & restaurants	17	17.1%	4	0.9%	20	4.2%	7	0.6%
Transport and storage	3	3.1%	5	1.4%	8	1.7%	10	1.0%
Communication and publishing services	0	0.0%	3	0.7%	3	0.5%	1	0.1%
Finance and insurance	0	0.0%	4	0.9%	4	0.7%	7	0.7%
Ownership of dwellings [b]	2	2.3%	12	3.1%	15	3.0%	22	2.1%
Rental Hiring Real Estate Services	1	1.4%	3	0.8%	5	1.0%	6	0.6%
Prof Scientific Tech Services	0	0.0%	2	0.5%	2	0.4%	2	0.2%
Admin Support Services	0	0.0%	1	0.4%	1	0.3%	3	0.3%
Public administration and defence	0	0.0%	20	5.1%	20	4.1%	28	2.7%
Education and training	0	0.2%	6	1.5%	6	1.2%	8	0.7%
Health and community services	0	0.0%	5	1.4%	5	1.1%	5	0.5%
Cultural and recreational services	3	3.1%	2	0.6%	5	1.1%	1	0.1%
Personal and other services	0	0.5%	1	0.3%	2	0.3%	4	0.4%
Total Intermediate	56	57.6%	390	99.8%	446	91.4%	316	30.3%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	7	7.6%	0	0.1%	8	1.6%	-	-
Imports	34	34.8%	0	0.1%	34	7.0%	-	-
Primary Inputs Total	41	42.4%	1	0.2%	42	8.6%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	559	53.7%
Government Expenditure	-	-	-	-	-	-	29	2.8%
Gross Fixed Capital	-	-	-	-	-	-	103	9.9%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	34	3.3%
Other Exports	-	-	-	-	-	-	0	0.0%
Final Demand Total	-	-	-	-	-	-	727	69.7%
GRAND TOTAL	98	100.0%	391	100.0%	488	100.0%	1,043	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-7 Employment, household income and household expenditure, Alexandrina, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	1,113	14.9%	1,191	17.8%	76	16.9%	35	5.0%
Mining	262	3.5%	362	5.4%	51	11.5%	0	0.1%
Manufacturing	739	9.9%	704	10.5%	40	8.8%	49	7.0%
Electricity, gas and water	55	0.7%	62	0.9%	5	1.1%	10	1.4%
Building and construction	647	8.7%	589	8.8%	40	8.9%	1	0.1%
Wholesale trade	105	1.4%	103	1.5%	10	2.3%	14	2.0%
Retail trade	813	10.9%	638	9.5%	33	7.3%	37	5.4%
Accommodation, cafes & restaurants	536	7.2%	383	5.7%	18	4.0%	20	2.8%
Transport and storage	281	3.8%	288	4.3%	23	5.2%	19	2.7%
Communication and publishing services	31	0.4%	26	0.4%	2	0.4%	2	0.3%
Finance and insurance	59	0.8%	50	0.7%	6	1.3%	7	1.1%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	101	14.6%
Rental Hiring Real Estate Services	87	1.2%	80	1.2%	7	1.6%	0	0.1%
Prof Scientific Tech Services	310	4.1%	230	3.4%	11	2.5%	0	0.1%
Admin Support Services	211	2.8%	117	1.7%	5	1.2%	1	0.1%
Public administration and defence	245	3.3%	237	3.5%	19	4.1%	1	0.1%
Education and training	469	6.3%	402	6.0%	26	5.9%	12	1.7%
Health and community services	922	12.3%	658	9.8%	50	11.0%	18	2.7%
Cultural and recreational services	91	1.2%	93	1.4%	9	1.9%	5	0.8%
Personal and other services	499	6.7%	472	7.1%	19	4.1%	13	1.8%
Total Intermediate	7,474	100.0%	6,685	100.0%	449	100.0%	345	49.6%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	49	7.0%
Imports	-	-	-	-	-	-	302	43.4%
Primary Inputs Total	-	-	-	-	-	-	351	50.4%
GRAND TOTAL	7,474	100.0%	6,685	100.0%	449	100.0%	696	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-8 Components of gross regional product in Alexandrina by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	76	16.9%	133	41.4%	6	16.5%	215	24.6%
Mining	51	11.5%	36	11.3%	2	6.5%	90	10.3%
Manufacturing	40	8.8%	15	4.7%	3	8.7%	58	6.6%
Electricity, gas and water	5	1.1%	6	1.8%	0	1.3%	11	1.2%
Building and construction	40	8.9%	0	0.0%	1	3.5%	41	4.7%
Wholesale trade	10	2.3%	4	1.3%	1	1.9%	15	1.7%
Retail trade	33	7.3%	3	1.1%	2	4.4%	38	4.3%
Accommodation, cafes & restaurants	18	4.0%	5	1.6%	3	8.4%	26	3.0%
Transport and storage	23	5.2%	9	2.8%	2	5.7%	34	3.9%
Communication and publishing services	2	0.4%	3	0.8%	0	0.2%	4	0.5%
Finance and insurance	6	1.3%	11	3.4%	1	2.6%	18	2.0%
Ownership of dwellings [b]	0	0.0%	81	25.3%	9	24.2%	90	10.3%
Rental Hiring Real Estate Services	7	1.6%	8	2.5%	2	6.0%	17	2.0%
Prof Scientific Tech Services	11	2.5%	0	0.0%	0	1.0%	12	1.3%
Admin Support Services	5	1.2%	0	0.0%	0	0.8%	6	0.6%
Public administration and defence	19	4.1%	3	1.0%	1	1.9%	23	2.6%
Education and training	26	5.9%	1	0.4%	0	1.1%	28	3.2%
Health and community services	50	11.0%	0	0.0%	1	2.7%	51	5.8%
Cultural and recreational services	9	1.9%	1	0.4%	0	0.1%	10	1.1%
Personal and other services	19	4.1%	1	0.2%	1	2.3%	20	2.3%
Total Intermediate	449	100.0%	320	100.0%	37	100.0%	807	92.4%
Net Taxes in Final Demand	-	-	-	-	-	-	67	7.6%
Gross Regional Product	-	-	-	-	-	-	873	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-9 Value of imports and exports by industry, Alexandrina, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	203	41.7%	203	33.4%	56	7.5%
Mining	0	0.0%	121	25.0%	121	20.0%	37	5.0%
Manufacturing	7	6.1%	79	16.4%	87	14.3%	44	5.9%
Electricity, gas and water	0	0.0%	5	1.1%	5	0.9%	6	0.9%
Building and construction	0	0.0%	11	2.2%	11	1.7%	15	2.0%
Wholesale trade	3	2.7%	5	0.9%	8	1.3%	9	1.2%
Retail trade	17	14.3%	3	0.6%	20	3.3%	11	1.5%
Accommodation, cafes & restaurants	22	17.9%	8	1.6%	29	4.9%	11	1.5%
Transport and storage	2	1.7%	11	2.3%	13	2.2%	14	1.9%
Communication and publishing services	0	0.0%	2	0.3%	2	0.3%	1	0.1%
Finance and insurance	0	0.0%	8	1.7%	8	1.4%	6	0.8%
Ownership of dwellings [b]	7	5.8%	9	1.8%	16	2.6%	26	3.5%
Rental Hiring Real Estate Services	1	0.7%	4	0.8%	5	0.8%	9	1.2%
Prof Scientific Tech Services	0	0.0%	3	0.6%	3	0.5%	3	0.4%
Admin Support Services	0	0.0%	2	0.5%	2	0.4%	3	0.4%
Public administration and defence	0	0.0%	2	0.5%	2	0.4%	10	1.4%
Education and training	0	0.0%	2	0.4%	2	0.3%	6	0.8%
Health and community services	0	0.0%	1	0.2%	1	0.2%	7	0.9%
Cultural and recreational services	3	2.5%	2	0.5%	5	0.9%	2	0.3%
Personal and other services	0	0.3%	3	0.7%	4	0.6%	8	1.0%
Total Intermediate	63	52.0%	484	99.7%	547	90.2%	283	38.0%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	9	7.6%	0	0.0%	9	1.5%	-	-
Imports	49	40.4%	1	0.3%	50	8.2%	-	-
Primary Inputs Total	58	48.0%	1	0.3%	59	9.8%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	302	40.6%
Government Expenditure	-	-	-	-	-	-	56	7.5%
Gross Fixed Capital	-	-	-	-	-	-	54	7.2%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	49	6.5%
Other Exports	-	-	-	-	-	-	1	0.2%
Final Demand Total	-	-	-	-	-	-	462	62.0%
GRAND TOTAL	121	100.0%	486	100.0%	606	100.0%	745	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-10 Employment, household income and household expenditure, Kangaroo Island, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	525	21.3%	616	26.8%	39	28.9%	6	5.1%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	39	1.6%	42	1.8%	2	1.5%	3	2.4%
Electricity, gas and water	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Building and construction	119	4.8%	100	4.4%	5	3.8%	0	0.0%
Wholesale trade	17	0.7%	19	0.8%	1	1.1%	1	1.0%
Retail trade	367	14.9%	270	11.7%	11	8.5%	8	6.3%
Accommodation, cafes & restaurants	255	10.4%	188	8.2%	8	6.0%	3	2.4%
Transport and storage	225	9.2%	255	11.1%	20	14.9%	6	5.0%
Communication and publishing services	21	0.9%	20	0.9%	1	0.8%	3	2.7%
Finance and insurance	13	0.5%	10	0.4%	1	0.8%	2	1.3%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	16	12.4%
Rental Hiring Real Estate Services	28	1.1%	26	1.1%	2	1.5%	0	0.0%
Prof Scientific Tech Services	154	6.3%	166	7.2%	9	7.0%	1	0.6%
Admin Support Services	149	6.1%	87	3.8%	5	3.6%	1	0.6%
Public administration and defence	152	6.2%	145	6.3%	9	7.0%	0	0.2%
Education and training	123	5.0%	105	4.6%	6	4.2%	2	1.2%
Health and community services	213	8.7%	203	8.8%	12	9.2%	5	4.1%
Cultural and recreational services	0	0.0%	1	0.0%	0	0.0%	0	0.0%
Personal and other services	59	2.4%	49	2.1%	2	1.1%	1	1.1%
Total Intermediate	2,460	100.0%	2,300	100.0%	133	100.0%	59	46.6%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	9	7.0%
Imports	-	-	-	-	-	-	58	46.4%
Primary Inputs Total	-	-	-	-	-	-	67	53.4%
GRAND TOTAL	2,460	100.0%	2,300	100.0%	133	100.0%	126	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-11 Components of gross regional product on Kangaroo Island by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	39	28.9%	50	52.6%	4	29.9%	93	36.0%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	2	1.5%	1	0.8%	0	1.2%	3	1.2%
Electricity, gas and water	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Building and construction	5	3.8%	0	0.0%	0	1.5%	5	2.1%
Wholesale trade	1	1.1%	2	1.6%	0	1.2%	3	1.2%
Retail trade	11	8.5%	1	0.9%	1	4.5%	13	4.9%
Accommodation, cafes & restaurants	8	6.0%	2	2.3%	1	11.5%	12	4.5%
Transport and storage	20	14.9%	15	15.7%	2	19.5%	37	14.5%
Communication and publishing services	1	0.8%	2	2.1%	0	0.5%	3	1.2%
Finance and insurance	1	0.8%	4	3.8%	0	1.9%	5	1.9%
Ownership of dwellings [b]	0	0.0%	15	15.3%	2	13.5%	16	6.3%
Rental Hiring Real Estate Services	2	1.5%	1	1.2%	0	3.5%	4	1.4%
Prof Scientific Tech Services	9	7.0%	0	0.0%	0	2.5%	10	3.8%
Admin Support Services	5	3.6%	0	0.0%	0	2.4%	5	2.0%
Public administration and defence	9	7.0%	2	1.7%	0	2.9%	11	4.4%
Education and training	6	4.2%	1	0.8%	0	0.7%	6	2.5%
Health and community services	12	9.2%	1	1.0%	0	2.3%	14	5.3%
Cultural and recreational services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Personal and other services	2	1.1%	0	0.1%	0	0.6%	2	0.6%
Total Intermediate	133	100.0%	96	100.0%	12	100.0%	241	93.7%
Net Taxes in Final Demand	-	-	-	-	-	-	16	6.3%
Gross Regional Product	-	-	-	-	-	-	257	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-12 Value of imports and exports by industry, Kangaroo Island, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	121	63.1%	121	40.1%	37	14.9%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	2	1.5%	3	1.6%	5	1.6%	4	1.5%
Electricity, gas and water	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Building and construction	0	0.0%	2	1.3%	2	0.8%	5	2.0%
Wholesale trade	2	1.6%	1	0.7%	3	1.0%	2	0.9%
Retail trade	10	9.4%	1	0.6%	12	3.8%	4	1.7%
Accommodation, cafes & restaurants	15	13.4%	4	1.9%	18	6.1%	6	2.5%
Transport and storage	7	6.7%	39	20.1%	46	15.2%	22	8.6%
Communication and publishing services	0	0.0%	1	0.7%	1	0.5%	2	0.6%
Finance and insurance	0	0.0%	3	1.7%	3	1.1%	1	0.4%
Ownership of dwellings [b]	5	4.3%	1	0.4%	5	1.8%	4	1.6%
Rental Hiring Real Estate Services	2	1.9%	2	0.8%	4	1.2%	3	1.2%
Prof Scientific Tech Services	0	0.0%	6	3.3%	6	2.1%	4	1.6%
Admin Support Services	0	0.0%	3	1.8%	3	1.1%	4	1.5%
Public administration and defence	0	0.0%	2	0.8%	2	0.5%	6	2.3%
Education and training	2	1.6%	1	0.3%	2	0.8%	1	0.6%
Health and community services	0	0.0%	0	0.2%	0	0.1%	3	1.2%
Cultural and recreational services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Personal and other services	0	0.1%	1	0.4%	1	0.3%	1	0.4%
Total Intermediate	45	40.7%	191	99.8%	236	78.3%	109	43.6%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	5	4.4%	0	0.0%	5	1.6%	-	-
Imports	60	54.9%	0	0.2%	61	20.1%	-	-
Primary Inputs Total	65	59.3%	0	0.2%	66	21.7%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	58	23.4%
Government Expenditure	-	-	-	-	-	-	10	4.0%
Gross Fixed Capital	-	-	-	-	-	-	12	4.9%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	60	24.1%
Other Exports	-	-	-	-	-	-	0	0.2%
Final Demand Total	-	-	-	-	-	-	141	56.6%
GRAND TOTAL	110	100.0%	192	100.0%	302	100.0%	250	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-13 Employment, household income and household expenditure, Mount Barker, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	484	4.6%	516	5.3%	32	4.3%	4	0.4%
Mining	270	2.5%	448	4.6%	77	10.5%	1	0.1%
Manufacturing	831	7.8%	1,003	10.4%	70	9.5%	73	7.0%
Electricity, gas and water	381	3.6%	443	4.6%	38	5.1%	71	6.8%
Building and construction	872	8.2%	907	9.4%	80	10.8%	1	0.1%
Wholesale trade	164	1.6%	149	1.5%	15	2.0%	13	1.3%
Retail trade	1,755	16.6%	1,263	13.1%	69	9.4%	98	9.4%
Accommodation, cafes & restaurants	798	7.5%	547	5.7%	26	3.5%	41	3.9%
Transport and storage	316	3.0%	341	3.5%	31	4.3%	14	1.3%
Communication and publishing services	71	0.7%	57	0.6%	4	0.5%	1	0.1%
Finance and insurance	126	1.2%	112	1.2%	14	1.9%	15	1.4%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	161	15.4%
Rental Hiring Real Estate Services	168	1.6%	166	1.7%	17	2.4%	1	0.1%
Prof Scientific Tech Services	608	5.7%	551	5.7%	32	4.4%	2	0.2%
Admin Support Services	311	2.9%	222	2.3%	12	1.6%	0	0.0%
Public administration and defence	516	4.9%	532	5.5%	40	5.4%	1	0.1%
Education and training	970	9.1%	851	8.8%	66	8.9%	43	4.1%
Health and community services	1,388	13.1%	1,042	10.8%	87	11.8%	35	3.3%
Cultural and recreational services	72	0.7%	51	0.5%	5	0.7%	1	0.1%
Personal and other services	497	4.7%	446	4.6%	21	2.8%	18	1.7%
Total Intermediate	10,598	100.0%	9,647	100.0%	734	100.0%	594	57.0%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	73	7.0%
Imports	-	-	-	-	-	-	375	36.0%
Primary Inputs Total	-	-	-	-	-	-	448	43.0%
GRAND TOTAL	10,598	100.0%	9,647	100.0%	734	100.0%	1,042	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-14 Components of gross regional product in Mount Barker by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	32	4.3%	36	8.4%	3	5.2%	71	5.4%
Mining	77	10.5%	74	17.2%	3	4.3%	154	11.7%
Manufacturing	70	9.5%	34	8.0%	5	7.0%	109	8.2%
Electricity, gas and water	38	5.1%	62	14.2%	11	17.4%	111	8.4%
Building and construction	80	10.8%	0	0.0%	3	4.3%	82	6.2%
Wholesale trade	15	2.0%	8	1.8%	1	1.8%	24	1.8%
Retail trade	69	9.4%	17	3.9%	4	5.9%	89	6.7%
Accommodation, cafes & restaurants	26	3.5%	6	1.4%	4	6.5%	36	2.7%
Transport and storage	31	4.3%	5	1.2%	3	4.1%	39	3.0%
Communication and publishing services	4	0.5%	4	1.0%	0	0.3%	8	0.6%
Finance and insurance	14	1.9%	36	8.3%	3	3.8%	52	3.9%
Ownership of dwellings [b]	0	0.0%	124	28.6%	14	21.1%	138	10.4%
Rental Hiring Real Estate Services	17	2.4%	16	3.6%	5	7.1%	38	2.8%
Prof Scientific Tech Services	32	4.4%	0	0.0%	1	1.6%	34	2.5%
Admin Support Services	12	1.6%	0	0.0%	1	1.0%	12	0.9%
Public administration and defence	40	5.4%	7	1.5%	2	2.6%	48	3.6%
Education and training	66	8.9%	2	0.4%	1	1.6%	69	5.2%
Health and community services	87	11.8%	0	0.0%	2	2.8%	88	6.7%
Cultural and recreational services	5	0.7%	2	0.4%	0	0.0%	6	0.5%
Personal and other services	21	2.8%	0	0.1%	1	1.6%	22	1.7%
Total Intermediate	734	100.0%	432	100.0%	65	100.0%	1,231	92.9%
Net Taxes in Final Demand	-	-	-	-	-	-	93	7.1%
Gross Regional Product	-	-	-	-	-	-	1,325	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-15 Value of imports and exports by industry, Mount Barker, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	68	12.6%	68	10.8%	20	2.3%
Mining	0	0.0%	164	30.6%	164	26.1%	28	3.2%
Manufacturing	6	6.4%	123	22.9%	129	20.5%	83	9.5%
Electricity, gas and water	0	0.0%	46	8.6%	46	7.3%	50	5.7%
Building and construction	0	0.0%	31	5.9%	31	5.0%	22	2.5%
Wholesale trade	3	3.8%	6	1.1%	10	1.5%	5	0.5%
Retail trade	23	24.6%	13	2.5%	36	5.7%	17	2.0%
Accommodation, cafes & restaurants	18	19.3%	6	1.2%	24	3.8%	9	1.0%
Transport and storage	3	3.2%	11	2.1%	14	2.2%	10	1.2%
Communication and publishing services	0	0.0%	3	0.6%	3	0.5%	1	0.2%
Finance and insurance	0	0.0%	10	1.9%	10	1.6%	9	1.0%
Ownership of dwellings [b]	2	2.3%	16	3.0%	18	2.9%	14	1.6%
Rental Hiring Real Estate Services	1	1.4%	8	1.4%	9	1.4%	13	1.4%
Prof Scientific Tech Services	0	0.0%	3	0.6%	3	0.5%	3	0.3%
Admin Support Services	0	0.0%	2	0.4%	2	0.4%	3	0.3%
Public administration and defence	0	0.0%	7	1.2%	7	1.1%	10	1.1%
Education and training	0	0.2%	7	1.3%	7	1.1%	9	1.0%
Health and community services	0	0.0%	7	1.4%	7	1.2%	6	0.7%
Cultural and recreational services	2	2.6%	2	0.3%	4	0.6%	1	0.1%
Personal and other services	1	0.7%	2	0.3%	2	0.4%	4	0.4%
Total Intermediate	59	64.4%	535	99.8%	594	94.7%	316	36.0%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	7	7.6%	0	0.1%	7	1.2%	-	-
Imports	26	28.0%	1	0.1%	26	4.2%	-	-
Primary Inputs Total	33	35.6%	1	0.2%	34	5.3%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	375	42.7%
Government Expenditure	-	-	-	-	-	-	68	7.8%
Gross Fixed Capital	-	-	-	-	-	-	93	10.6%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	26	2.9%
Other Exports	-	-	-	-	-	-	1	0.1%
Final Demand Total	-	-	-	-	-	-	563	64.0%
GRAND TOTAL	92	100.0%	536	100.0%	628	100.0%	879	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-16 Employment, household income and household expenditure, Victor Harbor, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	182	3.8%	196	5.0%	8	3.1%	2	0.4%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	194	4.1%	162	4.1%	9	3.7%	7	1.6%
Electricity, gas and water	17	0.4%	19	0.5%	1	0.4%	2	0.5%
Building and construction	401	8.4%	392	10.0%	33	13.8%	0	0.1%
Wholesale trade	51	1.1%	50	1.3%	5	1.9%	7	1.6%
Retail trade	962	20.2%	688	17.6%	32	13.3%	37	9.0%
Accommodation, cafes & restaurants	399	8.4%	298	7.6%	13	5.5%	11	2.7%
Transport and storage	123	2.6%	100	2.6%	7	2.9%	5	1.2%
Communication and publishing services	94	2.0%	86	2.2%	5	2.0%	14	3.3%
Finance and insurance	67	1.4%	69	1.8%	8	3.3%	17	4.2%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	63	15.1%
Rental Hiring Real Estate Services	92	1.9%	79	2.0%	6	2.7%	0	0.1%
Prof Scientific Tech Services	169	3.6%	133	3.4%	7	2.8%	0	0.1%
Admin Support Services	192	4.0%	133	3.4%	6	2.5%	1	0.2%
Public administration and defence	216	4.5%	195	5.0%	14	5.6%	1	0.2%
Education and training	338	7.1%	310	7.9%	20	8.1%	13	3.0%
Health and community services	1,074	22.6%	848	21.6%	61	25.2%	44	10.6%
Cultural and recreational services	51	1.1%	29	0.7%	2	1.0%	1	0.2%
Personal and other services	136	2.9%	133	3.4%	5	2.2%	4	1.0%
Total Intermediate	4,758	100.0%	3,918	100.0%	241	100.0%	229	55.3%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	29	7.0%
Imports	-	-	-	-	-	-	157	37.7%
Primary Inputs Total	-	-	-	-	-	-	186	44.7%
GRAND TOTAL	4,758	100.0%	3,918	100.0%	241	100.0%	415	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-17 Components of gross regional product in Victor Harbor by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	8	3.1%	26	18.1%	1	4.2%	34	7.7%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	9	3.7%	3	2.0%	1	2.6%	12	2.8%
Electricity, gas and water	1	0.4%	1	1.0%	1	3.9%	3	0.7%
Building and construction	33	13.8%	2	1.5%	1	5.7%	37	8.2%
Wholesale trade	5	1.9%	3	2.1%	0	1.8%	8	1.8%
Retail trade	32	13.3%	8	5.5%	2	8.6%	42	9.4%
Accommodation, cafes & restaurants	13	5.5%	4	2.6%	2	11.0%	19	4.3%
Transport and storage	7	2.9%	3	2.1%	1	2.8%	11	2.4%
Communication and publishing services	5	2.0%	7	5.2%	0	1.3%	13	2.8%
Finance and insurance	8	3.3%	24	16.8%	2	8.6%	34	7.6%
Ownership of dwellings [b]	0	0.0%	48	33.8%	5	25.6%	54	12.1%
Rental Hiring Real Estate Services	6	2.7%	7	5.1%	2	9.7%	16	3.5%
Prof Scientific Tech Services	7	2.8%	0	0.0%	0	1.1%	7	1.6%
Admin Support Services	6	2.5%	0	0.0%	0	1.6%	6	1.4%
Public administration and defence	14	5.6%	2	1.5%	1	2.6%	16	3.7%
Education and training	20	8.1%	1	0.9%	0	1.5%	21	4.8%
Health and community services	61	25.2%	1	1.0%	1	6.2%	64	14.3%
Cultural and recreational services	2	1.0%	1	0.5%	0	-0.1%	3	0.7%
Personal and other services	5	2.2%	0	0.3%	0	1.3%	6	1.3%
Total Intermediate	241	100.0%	143	100.0%	21	100.0%	405	91.0%
Net Taxes in Final Demand	-	-	-	-	-	-	40	9.0%
Gross Regional Product	-	-	-	-	-	-	445	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-18 Value of imports and exports by industry, Victor Harbor, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	36	23.2%	36	14.5%	7	1.7%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	1	1.2%	14	8.8%	15	5.9%	13	3.2%
Electricity, gas and water	0	0.0%	6	3.7%	6	2.3%	5	1.3%
Building and construction	0	0.0%	22	14.5%	22	9.0%	24	6.2%
Wholesale trade	3	2.7%	4	2.7%	7	2.7%	6	1.7%
Retail trade	20	20.9%	7	4.5%	27	10.7%	16	4.2%
Accommodation, cafes & restaurants	18	19.4%	7	4.5%	25	10.1%	12	3.0%
Transport and storage	2	1.8%	7	4.5%	9	3.5%	5	1.3%
Communication and publishing services	0	0.0%	5	3.0%	5	1.9%	7	1.8%
Finance and insurance	0	0.0%	20	12.6%	20	7.8%	11	2.9%
Ownership of dwellings [b]	5	5.7%	2	1.1%	7	2.8%	10	2.6%
Rental Hiring Real Estate Services	1	0.7%	7	4.2%	7	2.9%	8	2.0%
Prof Scientific Tech Services	0	0.0%	3	2.0%	3	1.2%	2	0.5%
Admin Support Services	0	0.0%	3	1.8%	3	1.1%	4	1.0%
Public administration and defence	0	0.0%	4	2.3%	4	1.4%	8	2.0%
Education and training	0	0.0%	3	1.9%	3	1.2%	5	1.2%
Health and community services	0	0.0%	4	2.3%	4	1.4%	13	3.3%
Cultural and recreational services	2	1.7%	1	0.6%	3	1.0%	1	0.2%
Personal and other services	0	0.3%	2	1.3%	2	0.9%	3	0.7%
Total Intermediate	52	54.5%	155	99.4%	206	82.4%	159	40.6%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	7	7.6%	0	0.1%	7	2.9%	-	-
Imports	36	37.9%	1	0.5%	37	14.7%	-	-
Primary Inputs Total	43	45.5%	1	0.6%	44	17.6%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	157	40.0%
Government Expenditure	-	-	-	-	-	-	5	1.3%
Gross Fixed Capital	-	-	-	-	-	-	34	8.7%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	36	9.2%
Other Exports	-	-	-	-	-	-	1	0.2%
Final Demand Total	-	-	-	-	-	-	232	59.4%
GRAND TOTAL	95	100.0%	156	100.0%	250	100.0%	391	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-19 Employment, household income and household expenditure, Yankalilla, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	359	24.6%	363	28.0%	17	23.0%	5	4.0%
Mining	16	1.1%	26	2.0%	2	3.0%	0	0.0%
Manufacturing	120	8.2%	87	6.7%	4	5.6%	8	6.2%
Electricity, gas and water	6	0.4%	6	0.5%	0	0.5%	2	1.9%
Building and construction	99	6.8%	107	8.2%	7	8.8%	0	0.1%
Wholesale trade	39	2.7%	44	3.4%	4	5.7%	8	6.1%
Retail trade	131	9.0%	116	8.9%	6	7.5%	6	4.5%
Accommodation, cafes & restaurants	169	11.6%	150	11.6%	7	9.7%	5	3.9%
Transport and storage	44	3.0%	52	4.0%	4	6.0%	4	3.1%
Communication and publishing services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Finance and insurance	10	0.7%	11	0.9%	1	2.0%	3	2.4%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	19	14.9%
Rental Hiring Real Estate Services	26	1.8%	32	2.5%	3	3.8%	0	0.0%
Prof Scientific Tech Services	17	1.2%	15	1.1%	1	1.1%	0	0.0%
Admin Support Services	38	2.6%	33	2.6%	1	1.1%	0	0.1%
Public administration and defence	52	3.6%	50	3.9%	4	5.1%	0	0.1%
Education and training	98	6.7%	84	6.5%	5	6.9%	2	1.8%
Health and community services	183	12.5%	92	7.1%	7	8.9%	2	1.9%
Cultural and recreational services	4	0.3%	4	0.3%	0	0.5%	0	0.0%
Personal and other services	48	3.3%	24	1.9%	1	0.9%	0	0.3%
Total Intermediate	1,458	100.0%	1,297	100.0%	74	100.0%	66	51.4%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	9	7.0%
Imports	-	-	-	-	-	-	53	41.6%
Primary Inputs Total	-	-	-	-	-	-	62	48.6%
GRAND TOTAL	1,458	100.0%	1,297	100.0%	74	100.0%	128	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-20 Components of gross regional product in Yankalilla by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	17	23.0%	38	51.3%	2	20.6%	57	33.5%
Mining	2	3.0%	3	4.1%	0	1.8%	5	3.2%
Manufacturing	4	5.6%	2	2.4%	0	3.6%	6	3.7%
Electricity, gas and water	0	0.5%	1	1.5%	1	7.6%	2	1.2%
Building and construction	7	8.8%	0	0.6%	0	2.7%	7	4.2%
Wholesale trade	4	5.7%	2	2.4%	0	3.6%	6	3.7%
Retail trade	6	7.5%	1	2.0%	0	3.8%	7	4.3%
Accommodation, cafes & restaurants	7	9.7%	2	2.5%	1	14.9%	10	6.1%
Transport and storage	4	6.0%	2	2.9%	0	5.5%	7	4.2%
Communication and publishing services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Finance and insurance	1	2.0%	5	6.5%	0	3.7%	7	3.9%
Ownership of dwellings [b]	0	0.0%	15	20.0%	2	19.8%	17	9.7%
Rental Hiring Real Estate Services	3	3.8%	1	1.4%	1	7.0%	4	2.6%
Prof Scientific Tech Services	1	1.1%	0	0.0%	0	0.3%	1	0.5%
Admin Support Services	1	1.1%	0	0.0%	0	0.5%	1	0.5%
Public administration and defence	4	5.1%	1	0.9%	0	1.7%	5	2.7%
Education and training	5	6.9%	1	0.9%	0	1.0%	6	3.5%
Health and community services	7	8.9%	0	0.3%	0	1.7%	7	4.1%
Cultural and recreational services	0	0.5%	0	0.2%	0	-0.2%	0	0.3%
Personal and other services	1	0.9%	0	0.0%	0	0.4%	1	0.4%
Total Intermediate	74	100.0%	74	100.0%	8	100.0%	156	92.3%
Net Taxes in Final Demand	-	-	-	-	-	-	13	7.7%
Gross Regional Product	-	-	-	-	-	-	169	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-21 Value of imports and exports by industry, Yankalilla, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	61	56.8%	61	43.0%	17	11.2%
Mining	0	0.0%	5	4.7%	5	3.6%	1	0.8%
Manufacturing	1	3.3%	8	7.9%	10	6.8%	7	4.5%
Electricity, gas and water	0	0.0%	2	1.7%	2	1.3%	2	1.3%
Building and construction	0	0.0%	4	3.6%	4	2.7%	5	3.2%
Wholesale trade	1	2.7%	3	2.8%	4	2.8%	6	4.2%
Retail trade	4	13.1%	1	1.0%	6	3.9%	3	2.1%
Accommodation, cafes & restaurants	8	23.4%	6	5.3%	14	9.7%	7	4.6%
Transport and storage	1	1.7%	6	5.3%	6	4.4%	4	2.7%
Communication and publishing services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Finance and insurance	0	0.0%	3	3.0%	3	2.3%	1	1.0%
Ownership of dwellings [b]	2	5.6%	0	0.4%	2	1.7%	3	2.3%
Rental Hiring Real Estate Services	0	0.0%	4	3.5%	4	2.6%	3	2.1%
Prof Scientific Tech Services	0	0.0%	1	0.6%	1	0.5%	0	0.2%
Admin Support Services	0	0.0%	1	1.0%	1	0.8%	1	0.5%
Public administration and defence	0	0.0%	1	0.5%	1	0.4%	3	1.7%
Education and training	0	0.0%	1	0.7%	1	0.5%	1	0.8%
Health and community services	0	0.0%	0	0.3%	0	0.2%	1	0.8%
Cultural and recreational services	0	0.8%	0	0.1%	0	0.3%	0	0.0%
Personal and other services	0	0.3%	1	0.5%	1	0.4%	0	0.3%
Total Intermediate	17	50.9%	107	99.7%	124	87.9%	67	44.2%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	3	7.6%	0	0.0%	3	1.9%	-	-
Imports	14	41.5%	0	0.3%	15	10.3%	-	-
Primary Inputs Total	17	49.1%	0	0.3%	17	12.1%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	53	34.8%
Government Expenditure	-	-	-	-	-	-	10	6.6%
Gross Fixed Capital	-	-	-	-	-	-	8	5.0%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	14	9.3%
Other Exports	-	-	-	-	-	-	0	0.2%
Final Demand Total	-	-	-	-	-	-	85	55.9%
GRAND TOTAL	34	100.0%	107	100.0%	141	100.0%	153	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-22 Employment, household income and household expenditure, McLaren Vale District, 2015/16 [a]

	Total Employment		FTE Employment		Household Income		Household Expenditure	
SECTOR	(jobs)	(%)	(fte)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	608	12.8%	562	13.3%	27	10.2%	5	1.1%
Mining	17	0.4%	26	0.6%	3	1.1%	0	0.0%
Manufacturing	1,073	22.6%	1,070	25.3%	62	22.9%	35	7.5%
Electricity, gas and water	7	0.2%	8	0.2%	1	0.3%	0	0.1%
Building and construction	346	7.3%	355	8.4%	27	10.2%	0	0.1%
Wholesale trade	144	3.0%	147	3.5%	15	5.7%	21	4.4%
Retail trade	333	7.0%	309	7.3%	17	6.2%	16	3.5%
Accommodation, cafes & restaurants	479	10.1%	296	7.0%	14	5.2%	15	3.2%
Transport and storage	185	3.9%	168	4.0%	15	5.7%	6	1.2%
Communication and publishing services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Finance and insurance	42	0.9%	41	1.0%	5	2.0%	6	1.3%
Ownership of dwellings [b]	0	0.0%	0	0.0%	0	0.0%	79	16.8%
Rental Hiring Real Estate Services	71	1.5%	71	1.7%	7	2.7%	0	0.1%
Prof Scientific Tech Services	209	4.4%	154	3.6%	8	2.8%	0	0.1%
Admin Support Services	181	3.8%	132	3.1%	7	2.7%	1	0.2%
Public administration and defence	33	0.7%	29	0.7%	2	0.8%	0	0.0%
Education and training	483	10.2%	446	10.5%	31	11.6%	20	4.4%
Health and community services	367	7.7%	269	6.4%	19	7.1%	5	1.2%
Cultural and recreational services	23	0.5%	20	0.5%	2	0.6%	0	0.1%
Personal and other services	146	3.1%	133	3.1%	6	2.2%	5	1.0%
Total Intermediate	4,749	100.0%	4,235	100.0%	270	100.0%	216	46.2%
PRIMARY INPUTS								
Household Income	-	-	-	-	-	-	0	0.0%
GOS and GMI [c]	-	-	-	-	-	-	0	0.0%
Taxes Less Subsidies	-	-	-	-	-	-	33	7.0%
Imports	-	-	-	-	-	-	219	46.8%
Primary Inputs Total	-	-	-	-	-	-	252	53.8%
GRAND TOTAL	4,749	100.0%	4,235	100.0%	270	100.0%	469	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-23 Components of gross regional product in McLaren Vale District by industry, 2015/16 [a]

	Household Income		GOS and GMI [c]		Taxes less Subsidies		Gross Regional Product	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	27	10.5%	26	18.1%	1	4.2%	34	7.7%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Manufacturing	9	3.4%	3	2.0%	1	2.6%	12	2.8%
Electricity, gas and water	1	0.4%	1	1.0%	1	3.9%	3	0.7%
Building and construction	33	12.7%	2	1.5%	1	5.7%	37	8.2%
Wholesale trade	5	1.7%	3	2.1%	0	1.8%	8	1.8%
Retail trade	32	12.3%	8	5.5%	2	8.6%	42	9.4%
Accommodation, cafes & restaurants	13	5.1%	4	2.6%	2	11.0%	19	4.3%
Transport and storage	7	2.7%	3	2.1%	1	2.8%	11	2.4%
Communication and publishing services	5	1.8%	7	5.2%	0	1.3%	13	2.8%
Finance and insurance	8	3.1%	24	16.8%	2	8.6%	34	7.6%
Ownership of dwellings [b]	0	0.0%	48	33.8%	5	25.6%	54	12.1%
Rental Hiring Real Estate Services	6	2.5%	7	5.1%	2	9.7%	16	3.5%
Prof Scientific Tech Services	7	2.6%	0	0.0%	0	1.1%	7	1.6%
Admin Support Services	6	2.3%	0	0.0%	0	1.6%	6	1.4%
Public administration and defence	14	5.2%	2	1.5%	1	2.6%	16	3.7%
Education and training	20	7.5%	1	0.9%	0	1.5%	21	4.8%
Health and community services	61	23.3%	1	1.0%	1	6.2%	64	14.3%
Cultural and recreational services	2	0.9%	1	0.5%	0	-0.1%	3	0.7%
Personal and other services	5	2.0%	0	0.3%	0	1.3%	6	1.3%
Total Intermediate	261	100.0%	143	100.0%	21	100.0%	405	91.0%
Net Taxes in Final Demand	-	-	-	-	-	-	40	9.0%
Gross Regional Product	-	-	-	-	-	-	445	100.0%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)

Appendix Table 5-24 Value of imports and exports by industry, McLaren Vale District, 2015/16 [a]

	Tourism		Other Exports		Total Exports		Imports	
SECTOR	($m)	(%)	($m)	(%)	($m)	(%)	($m)	(%)
Agriculture, forestry and fishing	0	0.0%	58	15.9%	58	12.4%	38	6.3%
Mining	0	0.0%	5	1.2%	5	1.0%	1	0.2%
Manufacturing	6	6.0%	234	63.7%	240	51.2%	122	20.5%
Electricity, gas and water	0	0.0%	2	0.5%	2	0.4%	1	0.2%
Building and construction	0	0.0%	11	3.1%	11	2.5%	11	1.8%
Wholesale trade	3	2.7%	7	1.9%	10	2.0%	14	2.3%
Retail trade	12	11.8%	4	1.2%	16	3.5%	7	1.2%
Accommodation, cafes & restaurants	18	17.8%	3	0.8%	21	4.5%	7	1.2%
Transport and storage	2	1.7%	8	2.1%	9	2.0%	7	1.2%
Communication and publishing services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Finance and insurance	0	0.0%	13	3.5%	13	2.8%	3	0.5%
Ownership of dwellings [b]	6	5.8%	2	0.4%	7	1.6%	16	2.6%
Rental Hiring Real Estate Services	1	0.7%	6	1.6%	6	1.4%	8	1.4%
Prof Scientific Tech Services	0	0.0%	5	1.3%	5	1.1%	2	0.4%
Admin Support Services	0	0.0%	3	0.9%	3	0.7%	3	0.6%
Public administration and defence	0	0.0%	2	0.5%	2	0.4%	1	0.1%
Education and training	0	0.0%	2	0.4%	2	0.3%	5	0.8%
Health and community services	0	0.0%	0	0.1%	0	0.1%	3	0.4%
Cultural and recreational services	1	1.3%	0	0.1%	2	0.3%	0	0.0%
Personal and other services	0	0.2%	2	0.7%	3	0.6%	1	0.2%
Total Intermediate	48	48.0%	366	99.9%	415	88.7%	249	41.8%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI [c]	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	8	7.6%	0	0.0%	8	1.7%	-	-
Imports	45	44.4%	0	0.0%	45	9.6%	-	-
Primary Inputs Total	52	52.0%	0	0.1%	53	11.3%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	219	36.8%
Government Expenditure	-	-	-	-	-	-	61	10.2%
Gross Fixed Capital	-	-	-	-	-	-	22	3.7%
Change in Inventories	-	-	-	-	-	-	0	-0.1%
Tourism	-	-	-	-	-	-	45	7.5%
Other Exports	-	-	-	-	-	-	0	0.0%
Final Demand Total	-	-	-	-	-	-	347	58.2%
GRAND TOTAL	101	100.0%	367	100.0%	468	100.0%	596	100%

[a-c] See footnotes for Table 9-1.

Source: EconSearch (2017)