



East Arnhem Region Economic Profile At a glance

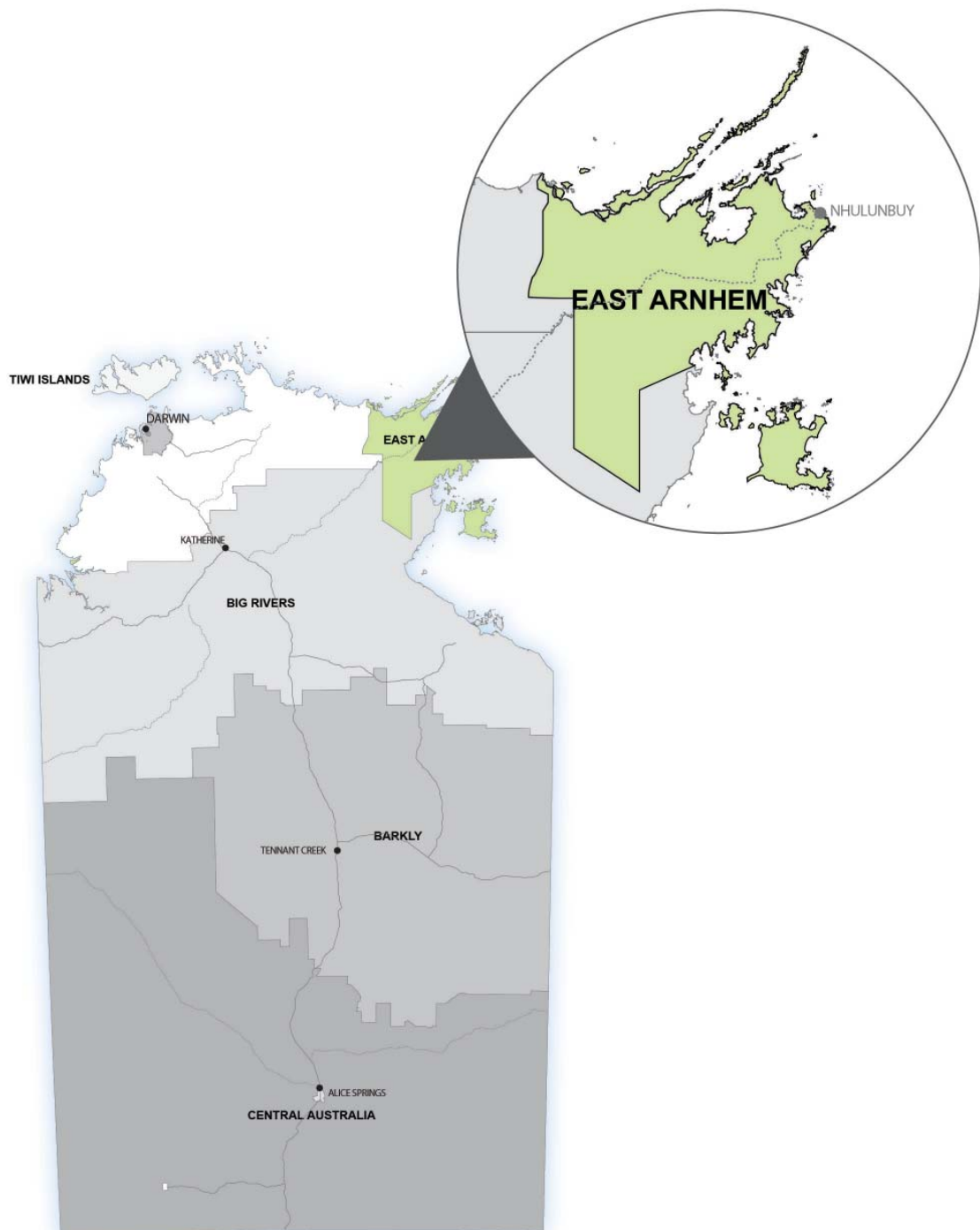
East Arnhem Region at a glance

This economic snapshot of the East Arnhem provides some basic facts about the region and highlights key aspects of the local economy and how it is changing over time.

The East Arnhem region is located in the north-eastern corner of the Northern Territory and covers 33 596 square kilometres. The East Arnhem region is mainly populated by the Yolŋu (or Yolngu) people, the traditional owners of the region. Seven percent (16 106) of the Northern Territory population live in the East Arnhem region. The main major population centres are Nhulunbuy and Alyangula (on Groote Eylandt). These two special purpose mining towns were established and are now maintained as a condition of nearby mining leases.

Mining contributed an estimated \$540 million to the region 2011-2012. The East Arnhem region contributes an estimated 7 per cent (\$1.3 billion) to the NT Gross State Product. That the average income in the region is higher than the NT average can be largely attributed to the high incomes associated with the mining sector.

Nhulunbuy is the region's service hub, with services including education, health, and law and order being delivered through a cooperative arrangement between the Northern Territory and the Australian Government.



Society

What are the labour force characteristics in the region?

DEMOGRAPHY		
Estimated resident population (30 June)	2010pr	2011pr
East Arnhem region minus Nhulunbuy = East Arnhem balance (bal.)		
Nhulunbuy	4,534	4,383
East Arnhem bal.	11,494	11,723
East Arnhem region	16,028	16,106
Northern Territory	230,315	231,331

Source: ABS cat no 3218.0 2010-11. Released July 2012. (pr - preliminary revised)

Estimated resident population by age as at 30 June 2011 – All persons (Age)	Male	Female
0-14	2,530	2,222
15-24	1,366	1,158
25-64	4,515	3,994
65+	177	144
East Arnhem region.	8,588	7,518
Median age	27.3	27.8

Source: ABS Cat. no. 3235.0 June 2011

POPULATION AGED 15 -64 YEARS (WORKING AGE)

	Indigenous	Non-Indigenous
Nhulunbuy	175	2,832
East Arnhem bal.	5,300	1,746
East Arnhem region	5,475	4,578

Source: ABS Census 2011 (Enumerated data, the number of people counted on census night). Non indigenous includes not stated and excludes overseas visitors.

Total population at Census	2006	2011
Nhulunbuy	5,220	4,287
East Arnhem bal.	9,141	10,414
East Arnhem region	14,361	14,701
East Arnhem median age	29	28

Source: ABS Time series profile. Figures include overseas visitors. Enumerated (the number of people counted on census night) data.

LABOUR MARKET - NHULUNBUY TOWN

Labour force	Sept 2012	Census 2011
Unemployed persons	126	51
Unemployment rate (%)	3.7	2.1
Labour force	3,429	2,451

Source: Department of Education, Employment and Work Place Relation (DEEWR), Small Area Labour Market Report (SALM) accessed March 2013 - North East NT

LABOUR MARKET - EAST ARNHEM REGION TOTAL

Labour force	Sept 2012	Census 2011
Unemployed persons	431	569
Unemployment rate (%)	6.0	9.4
Labour force	7,174	6,036

Source: DEEWR, SALM Report accessed March 2013 - North East NT

East Arnhem region includes Nhulunbuy, Groote Eylandt, East Arnhem bal. and Marngarr Community Government Council (CGC) for Sept 2012 data. 2006 ASGC standards are currently applied to this geography.

Economy

How much do we earn and where are the future labour shortages in the region?

SELECTED MEDIANS AND AVERAGES

		Census 2011	
		Nhulunbuy	East Arnhem
Median age of persons		33	28
Median individual income	\$/weekly	1,295	380
Median family income	\$/weekly	2,723	1,294
Median household income	\$/weekly	2,566	2,002
Median mortgage loan repayment	\$/monthly	2,025	1,889
Median rent	\$/weekly	3	26
Average number of persons per bedroom		1.1	1.5
Average household size		2.9	4.0

Source: ABS Census 2011 - Time series profile

INCOME

Mean taxable income		2007-2008	2009-2010
Nhulunbuy	\$	76,427	79,363
Groote Eylandt	\$	70,329	82,360
East Arnhem region total	\$	73,956	80,374
Northern Territory	\$	53,442	59,342

Source: Taxation Statistics 2009-10 released 2012.

LABOUR FORCE FORECAST BY OCCUPATION

	2011 (No.)	2016 forecast (% change)	2021 forecast (% change)
Managers and administrators	409	11.2	30
Professionals	1,079	31.5	74.5
Technicians and trade workers	778	40.6	90
Communications and personal service workers	502	7.5	15.5
Clerical and administrative workers	461	9.5	20.6
Sales workers	249	5.6	11.6
Machinery operators and drivers	493	27.6	66.1
Labourers and related workers	700	20.4	27.4

Source: ABS 2011 Census data and Regional Development forecast. Note: forecast provides a guide and does not include major projects. Labour force forecasts are based on a Leslie matrix population model. The Leslie matrix has been derived using a constant perpetual rate of return without taking into account any volatility of major projects that may impact on labour market conditions. Forecasts are based on time series data. ABS has made changes to Occupation classification, with 2011 Census Occupation responses being coded to ANZSCO rather than ASCO. This has included the addition of 24 new occupations and the deletion and merging of eight occupations. It has included minor changes to the classification structure and definitional changes for some occupations. This will impact labour force forecast data and as such this information should be used with caution.

Economy

(continued)

WORKFORCE EDUCATION - APPRENTICESHIPS AND TRAINEESHIPS

East Arnhem region	2011	2012
In training	410	295
Commencements	280	144

Source: NT apprentice and trainee register (DELTA) data sourced 22 March 2013.

EMPLOYMENT BY INDUSTRY

No of workers in each industry sector	2006	2011
Agriculture, forestry and fishing	19	19
Mining	435	492
Manufacturing	812	740
Electricity, gas, water and waste services	26	32
Construction	807	509
Wholesale trade	30	21
Retail trade	255	317
Accommodation and food services	202	205
Transport, postal and warehousing	162	136
Information media and telecommunications	23	16
Financial and insurance services	29	22
Rental, hiring and real estate services	18	30
Professional, scientific and technical services	126	109
Administrative and support services	164	155
Public administration and safety	1,083	740
Education and training	375	639
Health care and social assistance	511	490
Arts and recreation services	28	90
Other services	105	535
East Arnhem region total (includes Not stated)	5,534	5,467

Source: 2011 Census of Population and Housing. Time Series data.

AREA

Nhulunbuy	7.6 (Km ²)
East Arnhem bal.	33 588.6 (Km ²)
East Arnhem region	33 596.2 (Km ²)
Northern Territory	134 8198.7 (Km ²)

Source: ABS Catalogue 3218.0 2011.

GEOGRAPHY CHANGES

ABS changed geography from Australian Standard Geography Classification (ASGC) to Australian Standards Geography Standards (ASGS). One of the main changes incorporated by ABS is not to collect data on collection district. Changes to geography are noted below.

2011 Census (ASGS)	2006 Census (ASGC)
Australia - (1)	Australia - (1)
State and Territory - (9)	State and Territory - (9)
Statistical Area level 4 - (106)	Statistical Division (69)
Statistical Area level 3 - (351)	Statistical Sub Divisions - (217)
Statistical Area Level 2 - (2 214)	Statistical Local Areas - (1 426)
Statistical Area Level 1 - (54 805)	Collection District (38, 704)
Mesh Blocks - (347 627)	

Economy

(continued)

PRICES - COST OF LIVING			
Average cost of a standard basket of goods \$	Jun 2010	Jun 2011	Jun 2012
Nhulunbuy	230.61	232.51	250.37
Alice Springs	187.94	189.38	203.85
Darwin	189.63	193.55	203.13
Katherine	189.57	199.08	211.99

Source: NT Treasury: Grocery Price Survey June 2010, 11 and 12.

Cost of food basket by district, supermarkets and corner stores	2009 (\$)	2010 (\$)	2011 (\$)
East Arnhem District average	773	773	849
Supermarket	644	576	678
Corner stores	981	975	1,000

Source: NTG Market basket Survey, 2009, 2010, 2011

Housing - Mortgage and rent payments	East Arnhem	Nhulunbuy	NT
Median rent (\$)	27	3*	225
Households where rent payments are less than 30% of household income (%)	97.9	97.0	91.0
Households where rent payments are 30% or greater of household income (%)	2.1	3.0	9.0
Mortgage monthly repayments (\$)	1,889	2,025	2,058
Households where mortgage payments are less than 30% of household income (%)	99.9	99.7	92.3
Households where mortgage payments are 30% or greater of household income (%)	0.1	0.3	7.7

Source: ABS - Census 2011 - Quick stats - Usual residents.

* Cost of housing is subsidised by mining companies in mining towns. The commonly accepted guideline for housing affordability is where housing cost does not exceed 30% of a household's gross income. When the carrying cost of a home exceeds this threshold of housing income, then the housing is considered unaffordable for that household.

AVERAGE UNLEADED PETROL PRICES (CENTS PER LITRE)			
	Feb 2011	Feb 2012	Feb 2013
Nhulunbuy	-	-	191.00
Alice Springs	157.55	165.63	170.00
Darwin	138.96	154.64	167.10
Katherine	140.39	145.80	156.90
Tennant Creek	151.85	164.50	167.90
Northern Territory	143.37	156.44	165.20
Australia	136.30	142.90	152.00

Source: Australian Institute of Petroleum - data supplied by NT Treasury.

Economy

(continued)

UTILITY COST

Business power: \$56 establishment fee or \$118 for new service connection (BH). \$0.2982 per kWh plus \$0.75.07 fixed charge per day.

Domestic power: \$56 establishment fee or \$118 for new service connection (BH). \$0.2583 per kWh plus \$0.4808 fixed charge per day.

Business water: \$55 connection fee. \$1.7393 per KL used. Fixed daily charge per meter size: Up to 25mm - \$0.7225, 26-40mm - \$1.8496, 41-50mm - \$2.8839, 51-100mm - \$11.6511, 101-150mm - \$26.0066, 151-200mm - \$46.2458

Domestic water: as per business water

Business sewerage: Fixed annual charge of \$731.94 applies to non-domestic properties with < 3 sanitary fittings. Additional charges apply to more than three fittings plus the fixed cost.

Domestic sewerage: Fixed annual charge of \$731.94 applies to residential properties and vacant blocks able to be connected to the sewerage service.

For more information on power tariffs please access the power and water website. www.powerwater.com.au/tariff

POLICY CHANGES

A uniform tariff now applies to all Power and Water customers across the Territory, including those in remote communities. The tariffs in the Territory now sit in the middle of the range compared to interstate tariffs and is a step closer to reflecting what it actually costs to deliver essential services across the Territory. More information on power tariffs please access the power and water website: www.powerwater.com.au/tariff

East Arnhem facilities and advantages (selective)

Attractions/Arts/Tourism

Anindilakwa Arts and Culture centre
Bak'bididi festival
Bula Bula Arts centre
Elcho Island Arts
Gapuwiyak Art and Culture Centre
Garma Festival
Gattjirrk Milingimbi Cultural Festival
Golf Club
Gumurr Marthakal Healthy Living festival
Yacht Club
Night Sky Secrets
Arnhemland Historical Society
Health facilities
Angurugu
Umbakumba
Miyakburra, Bikerton Island
Gapuwiyak
Galiwin'ku Ngalkanbuy Health Centre
Milingimbi
Laynhapuy Homelands Associations (made up of 26 other homeland groups)
Marngarr
Ramingining
Yirrakala
Nhulunbuy

Childcare facilities

Arnhem Early Learning Centre
Nhulunbuy Community Childcare Centre
Nhulunbuy Family day care

Service stations

Fuel supply is readily available in Nhulunbuy and Anindilayakwa. Access to fuel in the other communities is variable.

Emergency services

Nhulunbuy Police Station
Nhulunbuy Fire Station
St John's Ambulance
Australian Search and Rescue Coordination Centre.

The following health facilities can be found in Nhulunbuy

Dental - private clinic
Doctor - Endeavour Medical Centre
NT Hearing Centre
Miwatj Health Aboriginal Corp
Centre for Disease Control Unit
St John Ambulance
Gove District Hospital

Industry

Number of businesses in the East Arnhem region and their contribution to the economy.

EAST ARNHEM REGION INDUSTRY SECTORS			
Industry classification	No. of businesses (2003-2007)	No. of businesses (2007-2011)	GRP 2012 (\$M)
Agriculture forestry and fisheries	27	21	4
Mining	8	-	544
Manufacturing	6	7	206
Electricity, gas and water supply	-	-	4
Construction	42	57	130
Wholesale trade	-	9	3
Retail trade	33	28	22
Accommodation and food services	6	3	12
Transport, postal and warehousing	-	34	19
Information media and telecommunications	-	3	3
Finance and insurance services	6	13	8
Rental, hiring and real estate services	33	22	12
Professional, scientific and technical services	-	16	11
Administrative and support services	-	15	13
Public administration and safety	-	-	54
Education and training	-	6	43
Health care and social assistance	9	6	47.37
Arts and recreation services	-	-	7
Other services	18	13	34
Not classified ¹	-	13	0
East Arnhem region	188	266	1,334

¹ This category consists of businesses that are yet to be coded to an industry.

Source: ABS, Counts of Australian Businesses, including Entries and Exits, Catalogue 8165.0. June 2003 to 2007 and June 2007-2011.

Gross Regional Product (GRP) includes ownership of dwellings, taxes, subsidies and statistical discrepancy.

GROSS STATE PRODUCT BY SECTORS

This section highlights the size, economic base, the contribution of each sector and how the East Arnhem economy is changing over time.

Industry classification	2001-2002 (\$M)	2006-2007 (\$M)	2011-2012 (\$M)
Agriculture, forestry and fishing	3.49	2.1	3.86
Mining	930.56	696.79	544.27
Manufacturing	59.29	104.24	206.07
Electricity, gas, water and waste services	7.73	6.87	4.33
Construction	53.02	212.42	129.91
Wholesale trade	2.52	2.1	2.71
Retail trade	9.47	16.12	22.44
Accommodation and food services	9.22	11.49	11.9
Transport, postal and warehousing	17.28	23.19	18.94
Information media and telecommunications	3.61	3.74	3.09
Financial and insurance services	9.68	8	8.36
Rental, hiring and real estate services	3.13	8.43	12.39
Professional, scientific and technical services	4.11	13.28	10.58
Administrative and support services	3.22	16.97	12.82
Public administration and safety	59.13	70.4	53.66
Education and training	24.91	25.86	43.02

Industry

(continued)

Industry classification	2001-2002 (\$M)	2006-2007 (\$M)	2011-2012 (\$M)
Health care and social assistance	26.36	43.51	47.37
Arts and recreation services	1	2.36	7.29
Other services	10.12	7.39	33.92
Ownership of dwellings	40	99.33	98
Total All Industries- GRP	1,384	1454	1,334

Total includes taxes less subsidies on products and statistical discrepancy.

Source: ABS Cat 5220.0, 2011 Census Time series and Dept. Regional Development and Women's Advancement published methodology.

GROSS STATE PRODUCT TOTAL	2001-2002	2006-2007	2011-2012
Nhulunbuy GRP (\$M)	834	831	615
East Arnhem region GRP (\$M)*	1,384	1,454	1,334
Northern Territory GSP (\$M)	12,524	15,079	18,086

Source: Dept. Regional Development and Women's Advancement 2013 - Methodology as published in Global Business Economic Review 2010.

*GRP is a derived methodology based on NTGSP/labour ratio applied to employment by Industry for a region – therefore labour intensive industries will influence the results and as such data is an estimation and for indicative purposes only. However it should be noted that the drop in NT GRP is in keeping with a drop in value of mining within the region which is one of the largest sectors that contribute to the region.

MINING

East Arnhem Region	Value of quantity sold (\$M)	
	2011	2012
Alumina ¹	753,677,498	741,517,575
Alumina Hydrate ¹	83,491,276	64,044,397
Bauxite ²	25,413,674	24,840,810
Manganese	1,013,065,363	884,299,010
East Arnhem Region Total	1,893,647,811	1,650,657,395

¹ Alumina and Alumina hydrate are derived from bauxite. Processing input and output data is deemed operator commercial in confidence.

² Quantity sold and dollar value of amount sold excludes input from alumina production.

Source: NT Treasury March 2013.

Industry

(continued)

TOURISM

Hotels, motels and serviced apartments by tourism regions

Kakadu Arnhem Region	Sept Qtr 2012
Establishments (no.)	11
Bed spaces (no.)	1,702
Persons employed (no.)	258
Guest nights occupied (no)	59,732
Guest Arrivals (no)	38,730
Accommodation takings (\$'000)	5.612
Bed occupancy rate(%)	38.1
Rooms (no)	564
Room nights occupied (no)	30,155
Average takings per night occupied (\$)	186.11

Source: ABS - Small Area Tourist Accommodation data, NT Sept 2012, ABS No. 8635755001

Visitor numbers, nights and average length of stay

2009-2010 to 2011-2012

Kakadu Arnhem Region	Visitor numbers ('000)	Visitor nights ('000)	Average stay (Nights)
Domestic	153	496	3
International	44	247	6
Region Total	198	743	4

Source: Tourism Research Australia June 2009 to July 2012. This region now incorporates Litchfield also.

CONSTRUCTION

East Arnhem region		2009	2010
Private sector	no	14	0
Total dwelling units	no	20	38
Value of private sector houses	\$M	2.0	0.0
Value of new residential building	\$M	4.9	9.8
Value of total residential building	\$M	5.1	10.1
Value of total non-residential building	\$M	8.4	35.8
Value of total building	\$M	13.5	45.9
Average value of private sector houses	\$'000	142.9	0.0

Source: ABS National Regional Profile - East Arnhem Region released June 2011.