

OZ Minerals Carrapateena Socio-Economic Knowledge Base

FINAL REPORT

October 2022

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EXECUTIVE SUMMARY

The Carrapateena copper-gold deposit was discovered in 2005 and was acquired by OZ Minerals in 2011. Since then, an underground Sub-Level Cave mine has been developed and is in operation. The Sub-Level Cave will transition to a block cave following completion of a Pre-Feasibility Study (PFS) in 2020, which analysed the whole Carrapateena Province and determined that replacing the lower half of the Sub-Level Cave with a block cave and expanding the expected annual throughput rate had the potential to create significantly more value than the Sub-Level Cave alone. Construction of the block cave declines began in Q4 2021.

The Carrapateena Sub-Level Cave mine has an estimated mine life of ~20 years and the Block Cave Expansion has the potential to extend the life of the mine by a further 20 years. The mine is located approximately 160 km north of Port Augusta in South Australia.

Objective of the Knowledge Base Update

The purpose of the knowledge base update is to review Carrapateena's historical socio-economic baseline to ensure it reflects the accumulation of facts or information since commencement of the Carrapateena mine in a transparent, accurate and informative manner to enable shared value and informed decision making.

This report provides OZ Minerals and its stakeholders with an updated socioeconomic characterisation of the study area surrounding Carrapateena to inform impact assessments, regulatory approvals, stakeholder engagement strategies, and project decision-making including local employment and procurement strategies. The information in this report will enable regional stakeholders to have accessible, accurate and consistent information to inform discussions with OZ Minerals and other industries and assist communities to shape their own futures.

Report Purpose

Additional studies will be completed to support assessments and approvals of the Carrapateena Block Cave Expansion Project.

The purpose of this updated knowledge base is to update OZ Minerals' knowledge of its local communities and economies. By building a shared understanding, this report will enable informed local decision-making so OZ Minerals can exceed the expectations of its stakeholders including workforce, community, governments, suppliers, customers, and shareholders.

Upper Spencer Gulf and the Far North

Mining and resource extraction industries continue to be important for the Far North region and for the state of South Australia as a whole. The overall increase in people employed in the mining sector in South Australia between 2006 and 2011 was 3,260. In 2016, mining employed 1.2% (approximately 9,000 people) of South Australia's workforce. The Carrapateena Mine currently employs more than 1,000 people through direct employment and employment through OZ Minerals' contracting partners.

Carrapateena's workforce as of July 2022 includes 65% South Australian-based, 23% interstate-based and 12% local/Upper Spencer Gulf-located. When considering the workforce employed directly by OZ Minerals it includes 72% South Australian-based, 14% interstate-based and 13% local/Upper Spencer Gulf-based workers. The local workforce travels to Carrapateena by charter flights from Adelaide and Port Augusta to site, and additional transit services are also available.

The role of copper mining in South Australia is significant, as evidenced by the continued support and investment from the State government in initiatives such as South Australia's Copper Strategy and PACE Copper.

Since 2016, there have been minimal changes to the regional demography and land use surrounding the Carrapateena Mine. Fluctuations have occurred in line with significant infrastructure project developments or contraction, including the construction of the Carrapateena Mine, the building a new high voltage power line to supply the Carrapateena and Prominent Hill mines, the decommissioning of

the Port Augusta Power Station and the closure of the Leigh Creek coal mine.

Across the study area, population has generally declined. This is consistent with national trends of population decline in rural and remote areas. The populations of major centres Port Augusta and Port Pirie have remained largely unchanged.

The Indigenous population within the study area remains largely unchanged from 2016 to 2021. Consistent with the 2016 results, Port Augusta has significantly more Indigenous people than the state and national average.¹

The Carrapateena Province

The Carrapateena mine operates under the Carrapateena Mineral Lease 6471 and several Miscellaneous Purposes Licences (MPLs) for supporting infrastructure and services (MPL 149, MPL 152 to 154 and MPL 156). The existing Carrapateena operation was approved by the State and Commonwealth governments in March 2018 and produced its first saleable concentrate in December 2019.

The Carrapateena Block Cave Expansion PFS, which focused on the opportunity to realise further value from the Carrapateena copper-gold Mineral Resource, was issued in June 2020. It concluded that there was the potential to deliver superior value for OZ Minerals' stakeholders by replacing the bottom half of the current sub-level cave with a larger block cave, operable from 2026.

Carrapateena's Life of Province Plan scoping study was also issued in June 2020. It considered at a Scoping Study level, future potential of resource extensions, satellite deposits and exploration targets, including Carrapateena, Fremantle Doctor, The Saddle, and Khamsin (known collectively as the Carrapateena Province). The Life of Province Plan is a material opportunity to further unlock the Carrapateena Province for many decades after Block Cave 2; providing the region with the potential for a multi-generational mine that delivers significant value for OZ Minerals' stakeholders.

Community Profile Consultation Process

How assets interact with directly or indirectly impacted stakeholders is guided by the company's Community Value Creation Policy which in turn is supported by OZ Minerals' Working with Stakeholders Specification (the Specification). The Specification ensures sound knowledge and planning forms the basis of asset interactions with stakeholders impacted directly, indirectly, or cumulatively by OZ Minerals' activities, to ensure they are identified, consulted, respected, and engaged with. Additionally, work that involves expansion of an existing asset requires the completion of a baseline study that is fit-for-purpose and describes key social, health, cultural heritage, political, legal, and economic factors that shape the lives of affected stakeholders. It is important to balance the statistical information with the known and lived experience of local stakeholders to provide a fulsome view of communities.

To understand the regional context underpinning the communities in this report, in March 2022 OZ Minerals initiated a consultation journey through the Spencer Gulf Cities group of Councils (Port Augusta City Council, Whyalla City Council and Port Pirie Regional Council). This process involved an initial meeting to provide an overview of the Carrapateena Block Cave Expansion Project and culminated in a workshop to share and explore the outcomes of the community profiles in this report. Local Council stakeholders were also invited to visit Carrapateena for a site tour in September 2022 to further enhance their knowledge of current operations.

A separate data gathering survey was sent to each pastoralist and the Traditional Owner corporation for Carrapateena (Kokatha Aboriginal Corporation RNTBC) to capture specific information relating to their individual circumstances and experience.

This report will be supplied to stakeholders who engaged in the feedback workshop and will be available on request to other regional organisations. This information is intended to enhance long-term decision making in areas such as education, infrastructure, and regional planning. The report provides a single information source for the local community context, which can be used to accurately measure the impacts of the Carrapateena Expansion Project.

¹ Coffey Services Australia. (2021). *OZ Minerals Carrapateena Expansion Project: Socioeconomic Baseline Update Report*.

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ABOUT THE REPORT

PURPOSE OF THE REVIEW

The purpose of the knowledge base update is to review Carrapateena’s historical socioeconomic baseline for the **Port Pirie, Port Augusta, Whyalla, and Roxby Downs Local Government Areas (LGAs)** to ensure it reflects the accumulation of facts or information since commencement of the Carrapateena mine in a transparent, accurate and informative manner to enable shared value and informed decision making.

Whilst the mine includes a significant Fly-In-Fly-Out (FIFO) workforce and includes a 550-person on-site camp, it also draws on the Port Augusta, Whyalla and Port Pirie labour markets, and housing and socio-economic infrastructure. As such, OZ Minerals requires an updated knowledge base of these communities to accurately analyse the impacts of the expansion in relation to:

- Local workforce
- Skills and training
- Local business, and
- Housing and liveability.

DATA COLLECTION

DESKTOP REVIEW

The report combines a review of the following secondary data:

Table 1 Data sources

Theme	Data	Source
Population	Annual change in estimated resident population 2007-2021	<ul style="list-style-type: none"> • Profile ID • Australian Bureau of Statistics – Regional population
	Components of population 2016-2021	<ul style="list-style-type: none"> • Australian Bureau of Statistics – Regional population
	Population flows from capital cities to regional Australia 2018-2022	<ul style="list-style-type: none"> • Regional Australia Institute - Regional Movers Index
Workforce	Indigenous Population	<ul style="list-style-type: none"> • ABS Census 2021
	Unemployment rates 2016-2021	<ul style="list-style-type: none"> • Nationals Skills Commission – Small Area Labour Markets
	Working-age population change 2011-2020	<ul style="list-style-type: none"> • Australian Bureau of Statistics – Stat Data Explorer
	Employment status (part-time and full-time) 2011-2016	<ul style="list-style-type: none"> • Australian Bureau of Statistics – 2011 and 2016 Census of Population and Housing
	Median employee income 2015-2019	<ul style="list-style-type: none"> • Australian Bureau of Statistics – Data by region
	Indigenous working-age population	<ul style="list-style-type: none"> • Australian Bureau of Statistics – 2011 and 2016 Census of Population and Housing
	Industry	Economic output by industry 2019-2021
Employment by industry 2015-2019		<ul style="list-style-type: none"> • Australian Bureau of Statistics – Data by region
Registered businesses 2019-2021		<ul style="list-style-type: none"> • Australian Bureau of Statistics - Counts of Australian Businesses

Theme	Data	Source
	Businesses by industry 2019-2021	<ul style="list-style-type: none"> Australian Bureau of Statistics - Businesses by industry division by LGA
Housing	Rental Market (12 months) 2013-2022	<ul style="list-style-type: none"> CoreLogic
	Vacancy Rate (1 month) 2013-2022	<ul style="list-style-type: none"> CoreLogic
	Sales Market (12 months) 2013-2022	<ul style="list-style-type: none"> CoreLogic
	75 th Percentile Sales Price (12 months) 2013-2022	<ul style="list-style-type: none"> CoreLogic
	Value of total building approvals 2012-2022	<ul style="list-style-type: none"> Economy ID

The desktop review also included a review of relevant regional strategies, plans and other documents. These included:

Table 2 Regionals strategies, plans and reports

Organisation	Document
1. Spencer Gulf Cities	Spencer Gulf Cities Housing Survey Report – March 2022
2. Spencer Gulf Cities	Transforming the Upper Spencer Gulf
3. RDA Far North/All SA RDA's	Regional Blueprint
4. Port Augusta City Council	PAC Economic Growth and Investment Strategy
5. Outback Communities Authority	OCA Economic Growth and Investment Strategy
6. Roxby Downs Council	Roxby Economic Growth and Investment Strategy
7. RDA Far North	Far North and Outback Climate Change Adaptation Plan
8. RDA Far North	Jobs for the Future Discussion Paper
9. RDA Far North	How the Development of the Mining Sector can Support Regional Businesses
10. Port Augusta City Council	Climate Change Adaptation Report
11. Port Augusta City Council	4 Year Priority Plan
12. Port Augusta City Council	Strategic Directions Plan 2019-2029
13. Port Augusta City Council	Urban and Regional Service Delivery Strategy – Closing the Gap
14. RDA Yorke and Mid North	Regional Roadmap
15. RDA Yorke and Mid North	Country SA Regional Services Directory
16. Central Local Government Region	Integrated Climate Change Vulnerability Assessment
17. Department of Education Skills and Employment	North West Country Local Jobs Plan
18. Department of Education Skills and Employment	Mid North Local Jobs Plan

SURVEY

A short survey was developed by OZ Minerals and the RAI to collect information from the Kokatha Aboriginal Corporation (KAC) and land connected pastoral operations, regarding the access to local services and challenges in attracting and retaining workers in the region.

Most of the study area comprises freehold and leasehold land, divided into pastoral properties. The majority of the pastoral properties deal in cattle or sheep only, with a small number having both. Carrapateena is located within Pernatty Station which is surrounded by Bosworth, Arcoona, South Gap, and Oakden Hills stations.

The Kokatha people are the Traditional Owners of the land on which Carrapateena operates. The

Kokatha people are associated with the land that is to the north of Port Augusta, extending from Lake Torrens in the east to the Gawler Ranges in the West. This includes the land surrounding BHP Olympic Dam Mine.

Kokatha Aboriginal Corporation operates across the Port Augusta, Roxby Downs, and Outback Communities Authority LGA's and is the registered native title body corporate representing Kokatha people. On 29 October 2021 Kokatha Aboriginal Corporation was appointed as the Recognised Aboriginal Representative Body (RARB) for its native title determination area under Part 2B of the Aboriginal Heritage Act 1988 (SA).

A Native Title Mining Agreement is in place with Kokatha Aboriginal Corporation, supported by a 'Partnering Agreement'. This agreement, also known as 'Nganampa palyanku kanyintjaku', (translated 'keeping the future good for all of us') acknowledges the longevity of the partnership with the Kokatha People and the intention to work together towards beneficial outcomes.

Commitments listed in the Native Title Mining Agreement include:

- OZ Minerals recognises that Kokatha may exercise traditional rights to enter/travel across certain parts of operations areas
- OZ Minerals must notify KAC of any exploration and will not carry on operations unless authorized by KAC
- OZ Minerals must conduct and fund a cultural heritage survey before any operations
- If historical objects, artefacts or remains are discovered during a survey, they must be protected
- Payments from OZ Minerals to KAC include milestone and administration payments as well as the funding of cultural and support programs for the Kokatha
- Where all else is equal, OZ Minerals will give preference to a Kokatha business tender
- OZ Minerals to seek to employ Kokatha people where possible and encourage contractors to do the same

VALIDATION WORKSHOP

A validation workshop was held on 12 October 2022, with representatives from:

- Whyalla City Council
- Port Augusta City Council
- Port Pirie Regional Council, and
- OZ Minerals.

The purpose of the workshop was to test the accuracy of the indicators presented in the four profiles developed for each LGA. Workshop attendees discussed key regional themes relating to affordable housing, health care and workforce needs of the Upper Spencer Gulf and explored some additional areas for further investigation. Attending stakeholders found that the profiles accurately represented their communities and demonstrated both opportunities and challenges for the future of the region.

REGIONAL OVERVIEW

The four LGAs of Port Pirie, Port Augusta, Whyalla, and Roxby Downs are significant regional hubs in the Upper Spencer Gulf and Far North regions of South Australia. Each will be both impacted by and play a considerable role in the pipeline of infrastructure development in the region. These projects will boost economic activity through procurement and also through a workforce-related injection of funding through accommodation for workers and the flow-on impacts in the broader retail, hospitality, and service sectors. However, what also needs to be considered is the socio-economic capacity of the region to manage influxes of workers, meet labour force demands, provide training and education, and develop and maintain key services to ensure liveability.

POLICY AND PIPELINE CONTEXT

There is a considerable amount of infrastructure planned and funded for the four LGAs. In conjunction with a range of policy changes, these will have a flow-on effect for the broader region. Across Port Pirie, Port Augusta, and Whyalla there are 37 renewable energy infrastructure programs in the pipeline, valued at over \$17 billion dollars. In terms of mining projects, at least half of the 30 planned for South Australia, will be in the Far North region.

The South Australian Government's Budget in June 2022 committed \$593 million over four years to establish a new hydrogen facility in the Whyalla region. It will include electrolysers, a combined cycle turbine plant and hydrogen storage capacity. The Budget also committed \$30 million towards a clean hydrogen industrial hub in Port Bonython. The hydrogen facility is scheduled to be completed in 2025 and will be a potential alternative energy supply to address current high electricity and gas prices. The hydrogen plant will produce clean energy that can be stored for future use. While hydrogen energy is still in its embryonic stages in Australia, once the technology has been proven then hydrogen will be part of Australia's energy mix and potentially reduce reliance on fossil fuel-based energy.²

Significant defence projects are also in the pipeline. One example is the \$71.5 million Stage 1 expansion of the Cultana base in the broader Port Augusta / Whyalla region. This project includes new training buildings, a camp area, training operation areas and vehicle wash points. The site supports the Australian Army's First Brigade training exercises during the monsoon season in northern Australia, the primary training base location. Stage 2 works include a combined arms range and additional training buildings at the Urban Operations Training Facility.³

Another project which may have flow-on implications for the overall region is the proposed National Radioactive Waste Management Facility (the Facility) in Kimba. The Commonwealth Government has selected Kimba as the location for the project. This would inject \$31 million into the region to provide long-term support for the region – through grants to strengthen the economic and skills base of the host community, and an Indigenous Advancement Strategy to support Indigenous opportunities. The Facility would be used to store low-level radioactive medical waste and temporarily store intermediate-level water. The Facility has generated considerable debate and the final approvals have not been provided. The South Australia Premier has called for the Traditional Owners to have right of veto of the project. The local federal Member for Grey has called for the Premier to clarify his comments in relation to the project as the proposed site is freehold land which extinguishes Native Title.⁴

Regarding policy, the termination of the Cashless Debit Card may have an indirect impact in the region, as the card is currently operating around Ceduna and the Northern Territory. The Commonwealth Government has legislated to replace the card with a range of measures such as income management technology, additional drug and alcohol treatment services, initiatives to support economic and employment opportunities and additional staffing support from Services Australia to support communities through the transition.⁵

²Department of Treasury and Finance. (2022). State Budget 2022-23 Agency Statements budget Paper 4 Volume 2. In *Budget Papers*. <https://www.statebudget.sa.gov.au/budget-papers/2022-23-Agency-Statements-Volume-2.pdf>

³Hamilton-Smith wants Cultana commitment. (2016, July 5). *The Transcontinental*. <https://www.transcontinental.com.au/story/3997473/seeking-cultana-pledge/>

⁴Department of Industry Science and Resources. (n.d.). Australian Radioactive Waste Agency. Retrieved October 27, 2022, from <https://www.industry.gov.au/australian-radioactive-waste-agency>

⁵Department of Social Services. (2022, September 24). *Empowering communities with the abolition of the cashless debit card program*. <https://ministers.dss.gov.au/media-releases/9151>

POPULATION

Population growth across all four LGAs has been in decline, with any growth usually through overseas migration and some natural increase (more births than deaths). However, with the onset of the COVID-19 pandemic, the availability of overseas migration has sharply declined, taking population growth opportunities for this region with it. Further, these gains have usually been overridden by net losses in internal migration. In contrast the Indigenous population of each of these LGAs has been growing over the last 10 years – in absolute terms and as a proportion of the total population. These opposing trends extend to the working-age population – while the total working-age populations have been declining, Indigenous working age populations have been growing.

Given the overall decline in these LGAs' populations (including their working-age populations) it will be important for leaders to focus on attracting and retaining people from domestic sources, particularly those who are of working-age, at least until international migration resumes more fully. Nevertheless, the RAI's *Regional Movers Index* is showing some increased migration from urban areas to Port Pirie and Port Augusta, although not for Whyalla, indicating that these losses to internal migration may be declining or reversing.

EMPLOYMENT AND WORKFORCE

The unemployment rates across the Port Pirie, Port Augusta and Whyalla LGAs have remained above the South Australian average over the last five years and have often been more turbulent. Unemployment rates have ranged between 5.9% and 15.5% across these places. In comparison, Roxby Downs has bucked this trend, with a significantly lower unemployment rate than the state average, as well as the other three LGAs. Its rate has remained below 2% over the last five years. This difference can be largely attributed to the role of the town as the support centre for the Olympic Dam mine.

Those LGAs with higher rates of unemployment may have some untapped availability in the local labour forces, notwithstanding their declining working-age populations. Still, the presence of a local tertiary learning system combined with local young people being provided with a good understanding of the local career and learning opportunities will be integral to retaining and realising this untapped potential in the local population. The local learning systems in each place vary, with some progress through the implementation of the UniHub in the Upper Spencer Gulf region and the University of South Australia campus in Whyalla.

Other factors affecting local people's employment in the region include transport, childcare and housing. These factors will likely also affect migration into the LGA. Carrapateena pastoralist stakeholders identified that in, competition with other industries for labour and wage pressures can impact their ability to attract workers for these operations. Kokatha Aboriginal Corporation noted that qualifications and experience of applicants, as well as wage pressures, decreased its ability to attract staff.

The local learning and innovation ecosystem is also necessary to support regional businesses and individual capability. This will support local businesses to take advantage of the industry opportunities in the region – whether through being a Defence supplier of choice or developing specific capabilities to support the local renewable energy industry.

HOUSING, EDUCATION, AND HEALTH

Despite population declines across all four LGAs, demand for housing has grown significantly, particularly since the onset of the COVID-19 pandemic. Supply for housing has also declined at the same time with the number of available rental properties dropping to as low as 1%, much lower than the 3% generally needed in a market. Rental listings have either plateaued or declined, indicating that they are being removed from the rental market.

Demand for housing has been driven by a range of factors, including lower median prices which have allowed greater access to the market, the incoming and often short-term construction industry workforce in some places, industry changes such as the shutdown of the Whyalla Steelworks, and the COVID-19 pandemic.

The lack of housing affects local employers' ability to recruit, and also increases the strain on other housing and accommodation types, which in turn pushes people into inappropriate housing options such as caravan parks and motels.

There are many opportunities for further housing development across these LGAs, with plenty of appropriately zoned land available. However, there is a lack of local developers and in some places, there are considerable wait times for building services, while infrastructure costs associated with developing land remain a challenge. There is also likely to be considerable competition among employers in residential and non-residential construction for skilled trades.

In terms of education and health services, there are a range of primary and secondary schools across Port Pirie, Port Augusta, and Whyalla. These include both public and private schools catering for all year levels. Roxby Downs – noting its smaller population – has just one school. In terms of health services, Roxby Downs again has the most limited range, but is serviced by a health facility, GP, pathologist, and pharmacy. Everywhere else has access to a number of general practitioners and bulk billing options, as well as a range of allied health services. From a tertiary health perspective, available services include accident and emergency, maternity and obstetric, renal, chemotherapy and palliative care.

Feedback from Carrapateena pastoralist stakeholders indicates that access to education, phone and internet connectivity and social and assistance services is challenging in this region. The Kokatha Aboriginal Corporation reported that access to housing and public transport is especially challenging, as well as access to employment, education, and training services.

PORT PIRIE

SUMMARY

- The Port Pirie LGA is experiencing a decline in both its overall population and working-age population. Previously the LGA relied heavily on overseas migration, however with COVID-19, this and internal migration have been a drag on population growth.
- However according to the RAI's *Regional Movers Index*, Port Pirie is experiencing growing migration from urban areas, indicating that its internal migration trends may be changing.
- Further, the Indigenous population has been going against this trend, increasing in terms of absolute numbers and working-age population over the last 10 years.
- The Port Pirie LGA has consistently had a higher unemployment rate than South Australia as a whole and has the highest unemployment rate in the Mid North Employment Region. This is largely attributed to youth unemployment and the concentration of support services in the LGA.
- Whilst the working-age population is declining and migration is limited, there may be some untapped capacity in the local labour force to fill vacancies arising from the region's projects pipeline, including three significant renewable energy projects, and continued and significant manufacturing operations.
- As such the LGA needs further training and job-readiness support to ensure this latent workforce can be activated and trained to meet specific workforce needs. However there has been positive steps in developing the region's training and skills ecosystem in the establishment of the UniHub in 2019.
- This complements the existing primary and secondary education services, which includes both public and private schools from years R to 12.
- Growth in the skills and capacity of employees and businesses will be a significant factor in the LGA's ability to take advantage of growth opportunities. There has been some growth in businesses in key industries (e.g., Professional, Scientific, and Technical), indicating the LGA's economy is diversifying as needed.
- Other challenges impacting employment in the region include transport, childcare and housing. These factors will likely also impact on migration into the LGA.
- While the LGA's population has declined, demand for housing has grown significantly since the COVID-19 pandemic, with the number of available properties for rent dropping to below 1%, much lower than the 3% generally needed in a market.
- This has been driven by a previous oversupply of housing which has kept the median house price comparatively low, giving a range of parties easier access to the housing market.
- Demand for housing is now outstripping supply, which is subsequently forcing some households into inappropriate housing options (caravan parks). This will impact on the LGA's ability to attract more people, particularly workers to the region.
- There is the opportunity for further housing development, with the availability of appropriately zoned land in Port Pirie, however there are considerable wait times for building services, and service and infrastructure costs associated with developing land will be a challenge.
- Health services in Port Pirie include primary and tertiary services, as well as a range of allied health services. This includes bulk billing GP practices and a number of preventative health initiatives.

PIPELINE AND POLICY

The pipeline of projects for the Port Pirie LGA is extensive. The following are some of the large Infrastructure, Manufacturing, Mining and Renewable Projects slated for commencement and/or completion in or near Port Pirie. Of the nine projects listed below, three are for energy projects, valued at a total of \$1.9 billion.

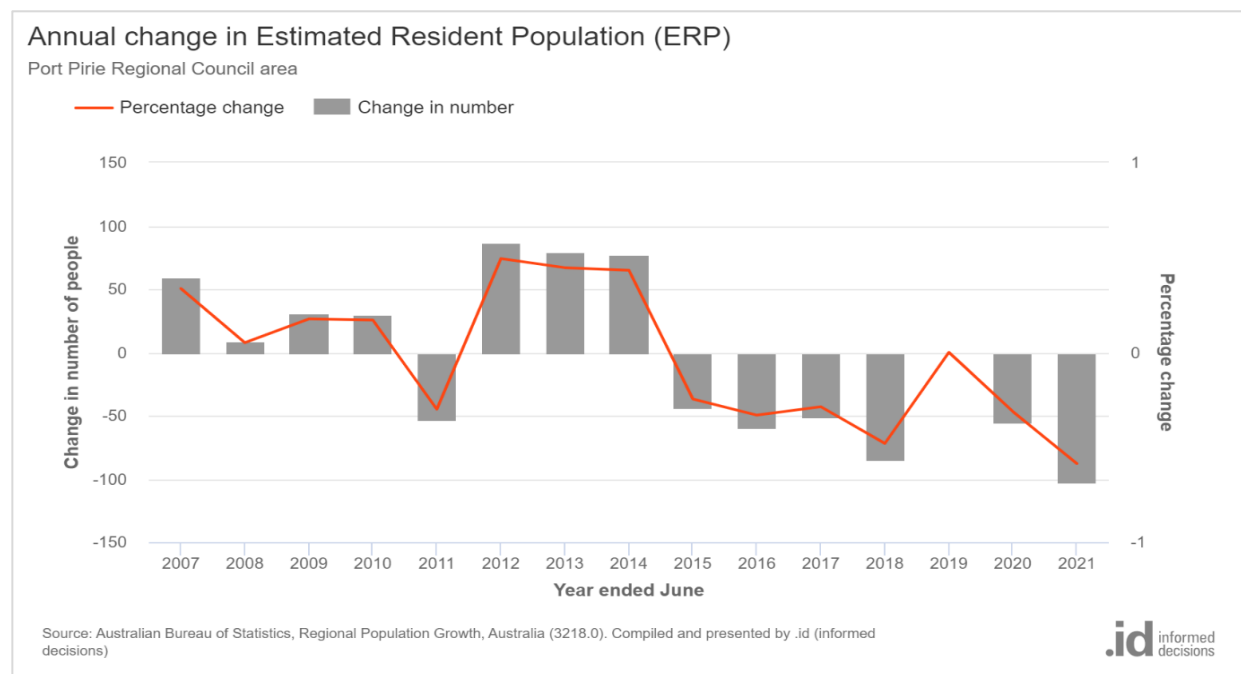
Table 3 Port Pirie Infrastructure Pipeline

Project	Timeline	Sector	Value	Jobs	Source
1. Bungama Solar Project	2018 Project announced 2022 Expected Construction Commencement 2025 Expected Construction Completion	Energy	\$650m		Australia New Zealand Infrastructure Pipeline
2. Port Pirie Hydrogen Plant	2022 Final Investment Decision Expected 2023 Expected Construction Commencing	Energy	\$750m		Australia New Zealand Infrastructure Pipeline
3. CirPro (Pirie Meats) Livestock Processing Facility	2023 Expected Completion	Manufacturing	\$104m	400 after construction	Australia New Zealand Infrastructure Pipeline and Spencer Gulf Cities Housing Report
4. Nystar Product Recycling Facility		Waste	\$23m	75 FTE	Spencer Gulf Cities Housing Report
5. Sustech Desalination Plant		Water	\$2.5m	5	Spencer Gulf Cities Housing Report
6. 20 Holiday Cabins, 8 Hill Street, Port Pirie.		Accommodation	\$1.6m	2	Spencer Gulf Cities Housing Report
7. Resource Recovery and Storage Facility, 23 Abattoirs Road		Waste	\$5.6m	6 - 10	Spencer Gulf Cities Housing Report
8. Tiller 10,000 Cattle Feedlot		Agriculture	\$2m	10	Spencer Gulf Cities Housing Report
9. Neoen Crystal		Energy	\$500m	250	Spencer Gulf Cities Housing

Project	Timeline	Sector	Value	Jobs	Source
Brook Energy Park					Report

POPULATION

Figure 1 Port Pirie Annual Change in Estimated Residential Population 2007 to 2021. Source: Economy ID



In 2021 the Estimated Residential Population for the Port Pirie LGA was 17,473. As shown in Figure 1, the LGA has been experiencing population decline since 2015, which was particularly severe in 2021. However, while the 2015 decline is likely due to the end of the mining boom, the 2021 population decline is very likely linked to COVID-19 restrictions including the closure of Australia’s international border and limited inter-state movements. The local Indigenous population has resisted the overall local trends – rising over the past 10 years, in absolute size and also in terms of their share of the local population (see Figure 2).

Figure 2 Local Indigenous population - Port Pirie, 2011 to 2021

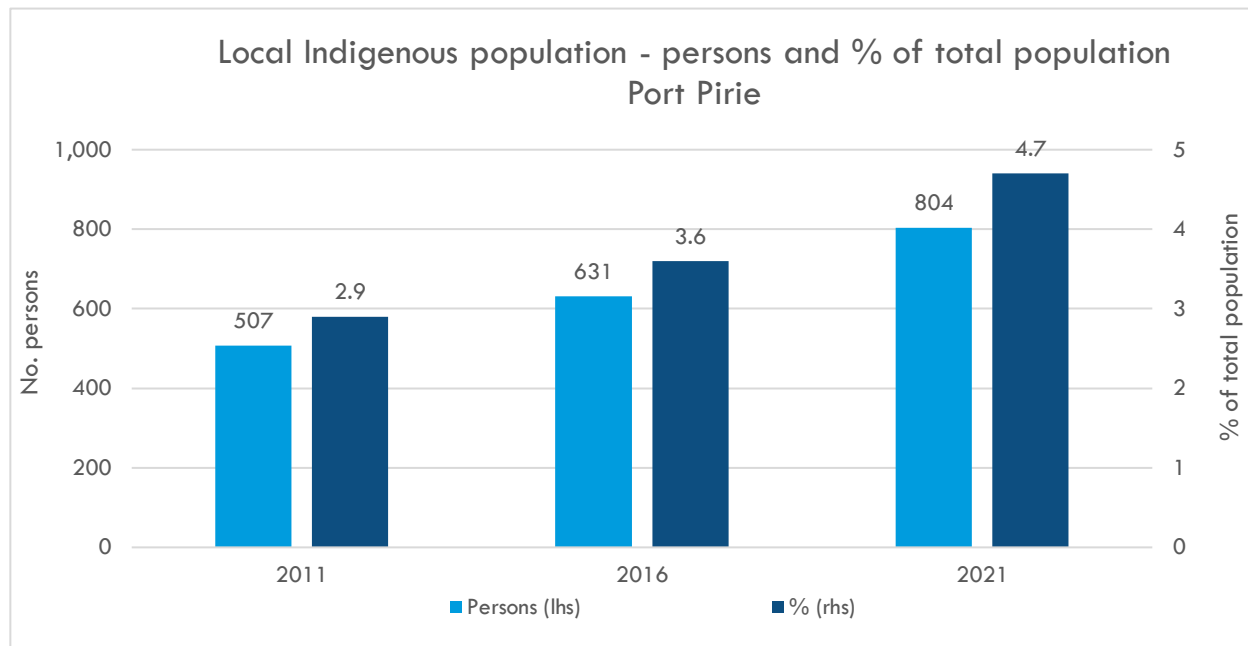


Figure 3 Port Pirie - Components of Population Change 2017 to 2021

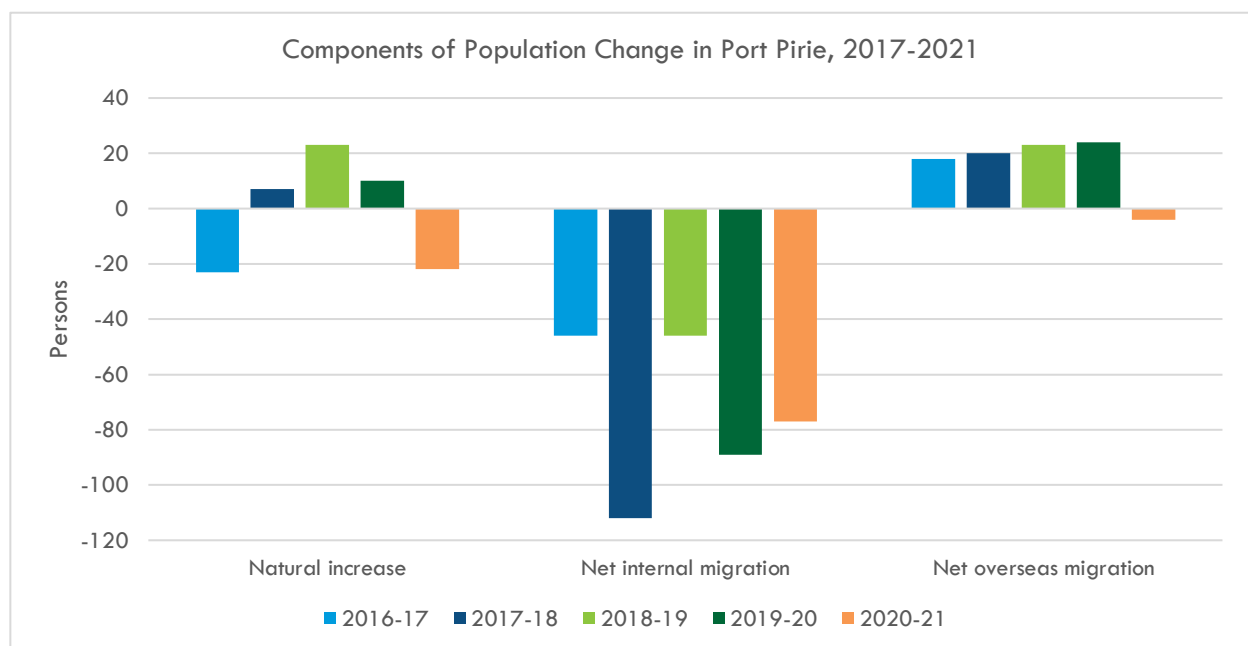


Figure 3 shows that a major factor in the region’s population decrease was internal migration, which has had a negative net impact on population for the last five years. The region’s natural increase (births minus deaths) was also in decline in 2021, however prior to this the region was experiencing some growth from this component of the population. Where Port Pirie has experienced growth is in its overseas migration, which up until the COVID-19 pandemic was showing upward trends in net migration, albeit of small groups of migrants. It will be important for Port Pirie to consider how to attract both overseas and internal migrants to grow its population, and ultimately fill vacancies.

However, there is a new nation-wide post-pandemic social phenomenon that more Australians are moving from cities to regional areas. As shown in Figure 4 **Error! Reference source not found.**, compared to the pre-pandemic stage (before March 2020) there has been an overall 12% increase in people

moving from cities to regions across Australia. Figure 5 shows that Port Pirie experienced a 29% increase in people moving from urban areas to the LGA from 2020 to 2021. The elevated levels of Australians flowing from capital cities to regional areas provides a solid foundation for further growth in the region.

Figure 4 Regional Movers Index: population flows from capital cities to Regional Australia 2018 to 2021

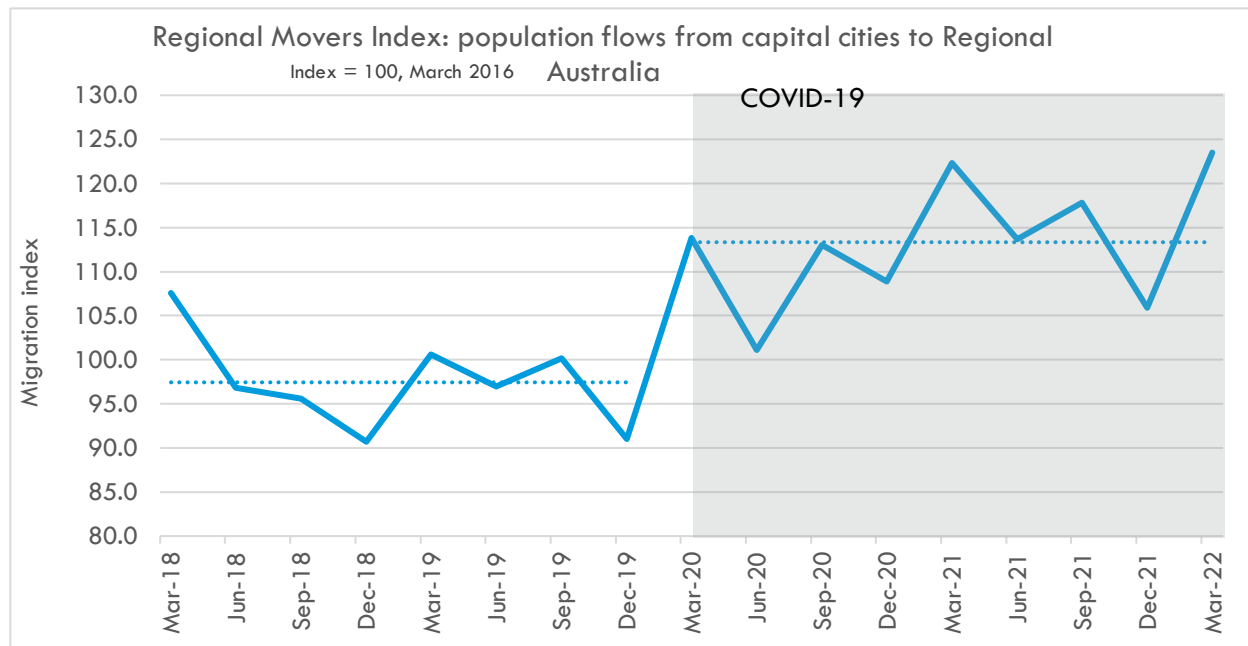
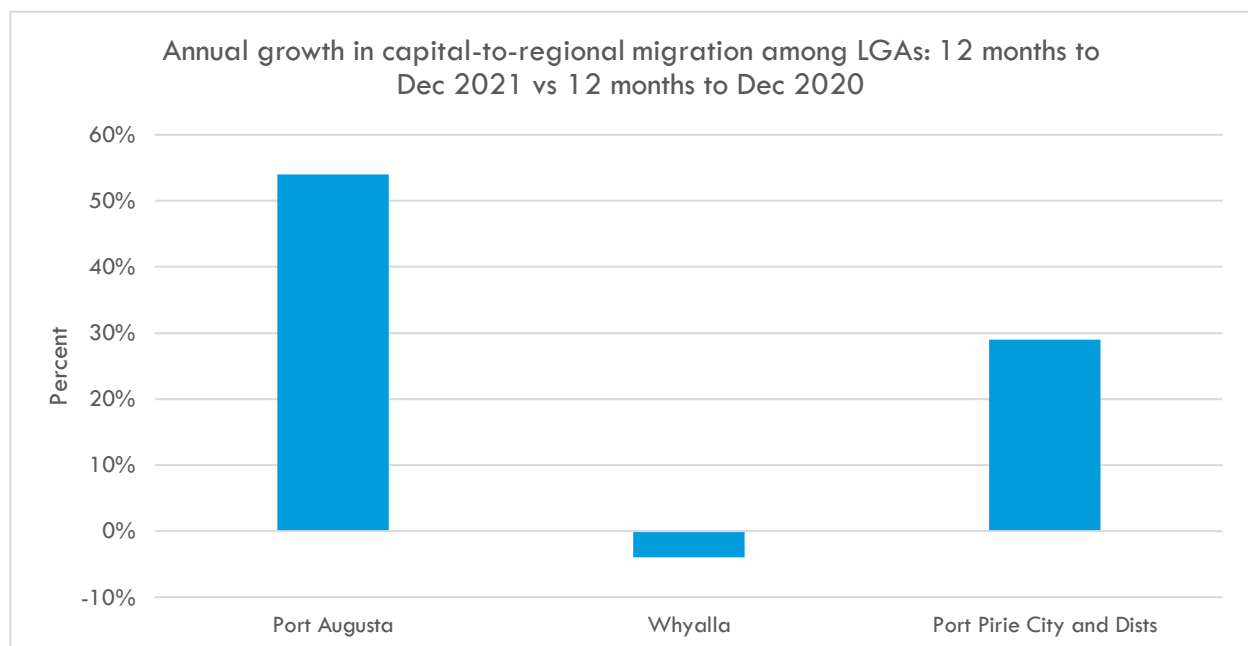


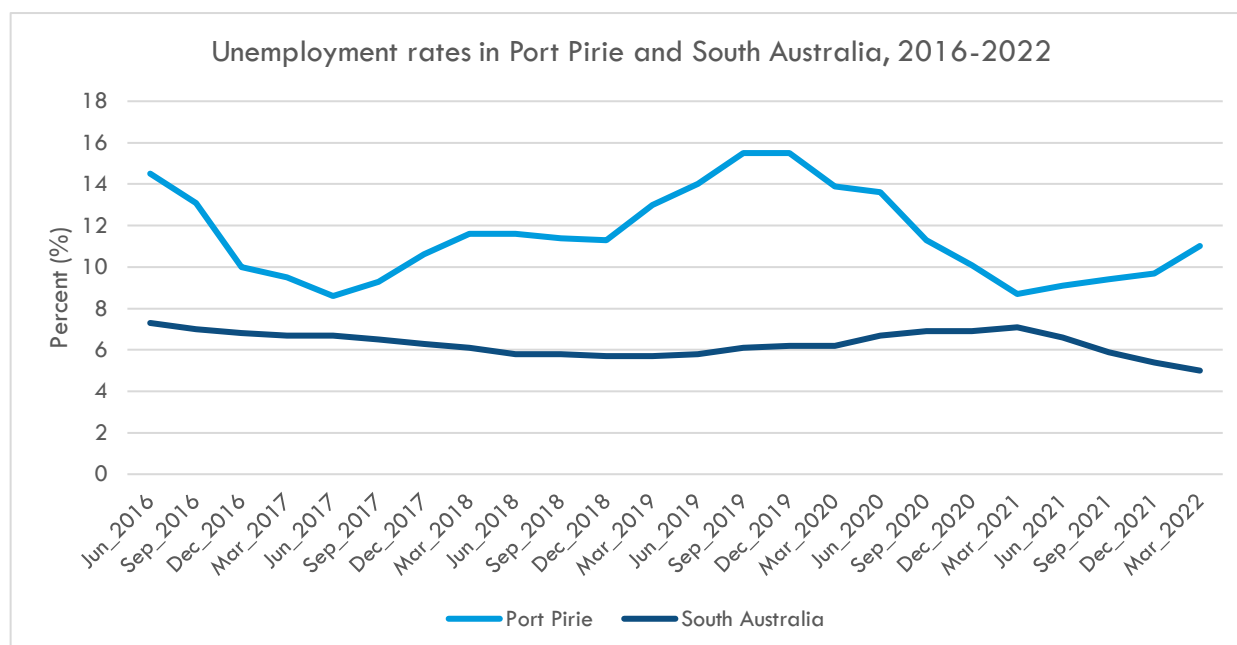
Figure 5 Regional Movers Index - Annual growth in capital-to-regional migration among LGAs



WORKFORCE

UNEMPLOYMENT

Figure 6 Unemployment rates- Port Pirie and South Australia, 2016-2022



For Port Pirie, despite fluctuations over the last five years, the unemployment rate remains above the state’s average, peaking at 15.5% by the end of 2019 (see Figure 6). Whilst the unemployment rate declined to 8.7% in March 2021, it has since begun to climb again, particularly in early 2022. The COVID-19 pandemic appears to not have had any negative impacts on the employment rate, and the increase in the unemployment rate in 2022, which is out of step with the South Australia’s rate, indicates some employee supply in the Port Pirie market.

The *Mid North South Australia Local Jobs Plan* (released November 2021) includes the Port Pirie sub-region, noted that there is significant disparity in the unemployment rate across the broader Mid North Employment Region, with rates in Port Pirie being higher. This report noted that this reflects high unemployment rates of young people as well as the concentration of health and social assistance services in Port Pirie.

The report also highlighted the impact of the COVID-19 pandemic, with the number of job seekers registered in Commonwealth employment services in the Mid North Employment Region growing by 75% between March 2020 to August 2020. However, this then declined by 20% over the following six months, as unemployment declined.

Challenges to employment identified by this report include access to both public and private transport in the region as a high proportion of people do not live close to their place of work, and community buses only serve the more urban areas of the region (including Port Pirie itself). Further challenges include a lack of childcare care services which is impacting on parents’ ability to return to work, and the availability of suitable housing in the towns with the most jobs available.

LABOUR FORCE

Along with the regional decrease in overall population, Port Pirie’s working-age population has also been in decline since 2015 (see Figure 7). This reflects the natural process of population ageing, as well as the out-migration of younger people. This will impact on the availability of workers in this LGA, as well as the demand for services by those outside the working-age groups. Meanwhile, census data show that the Indigenous working-age population has been rising since 2011, reaching some 500 people (out of a total of just over 800 Indigenous persons) in 2021.

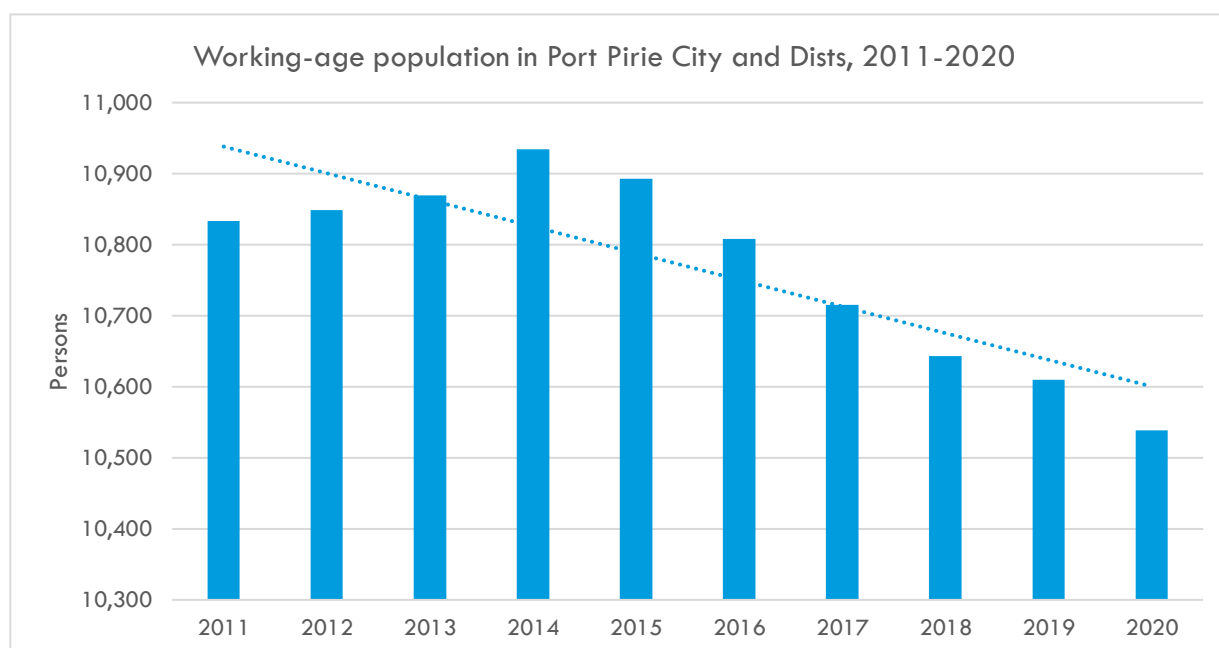
The *Transforming the Upper Spencer Gulf* paper (released in 2017) has previously also noted the need to

build local skills and capability to service growth industries, including through re-training of unemployed groups. The paper recommended the development of the Upper Spencer Gulf ‘Community Owned Tertiary Education Centre’ (COTEC) to meet local skilling needs. TAFE SA has a Port Pirie campus offering courses that have been developed in collaboration with local industry, including aged and disability services, automotive, beauty services, building trades, business and administration, children’s education, cookery, electrical, English proficiency, fabrication, hospitality, literacy and numeracy, mental health, nursing, plumbing and work health safety.⁶

The *Mid North South Australia Local Jobs Plan* noted skills shortages in construction and other trades in the Mid North region, which has been exacerbated by changes to the Vocational Education and Training (VET) sector – notably funding for courses, delivery methods which are not suitable for ‘hands-on’ trade courses and the availability of qualified trainers. It was also noted that attracting Registered Training Organisations (RTOs) to the region is difficult and as such challenging to develop a training sector with scale and depth in the region. This report also noted the need for greater industry exposure and on-site training and experience to support applicants to transition to the workforce and utilise their qualifications. Whilst moving some courses and study options online is valuable, there is a lack of local support for students, and some lack the internet and technology infrastructure to effectively participate in training and study.

The UniHub opened in Port Pirie in 2019 and provides students support and a space to study a range of tertiary courses, with either UniHub partner universities delivering through the hub, or other tertiary institutions. The UniHub provides support degrees in Engineering, Business Administration, Education, Business, Nursing, Psychological Science, Social Work, Education and Digital Media.⁷ This Hub provides the opportunity for Port Pirie residents to re-train to meet some of the industry opportunities in the region.

Figure 7 Working-age population - Port Pirie, 2011 to 2020



QUALITY OF WORK

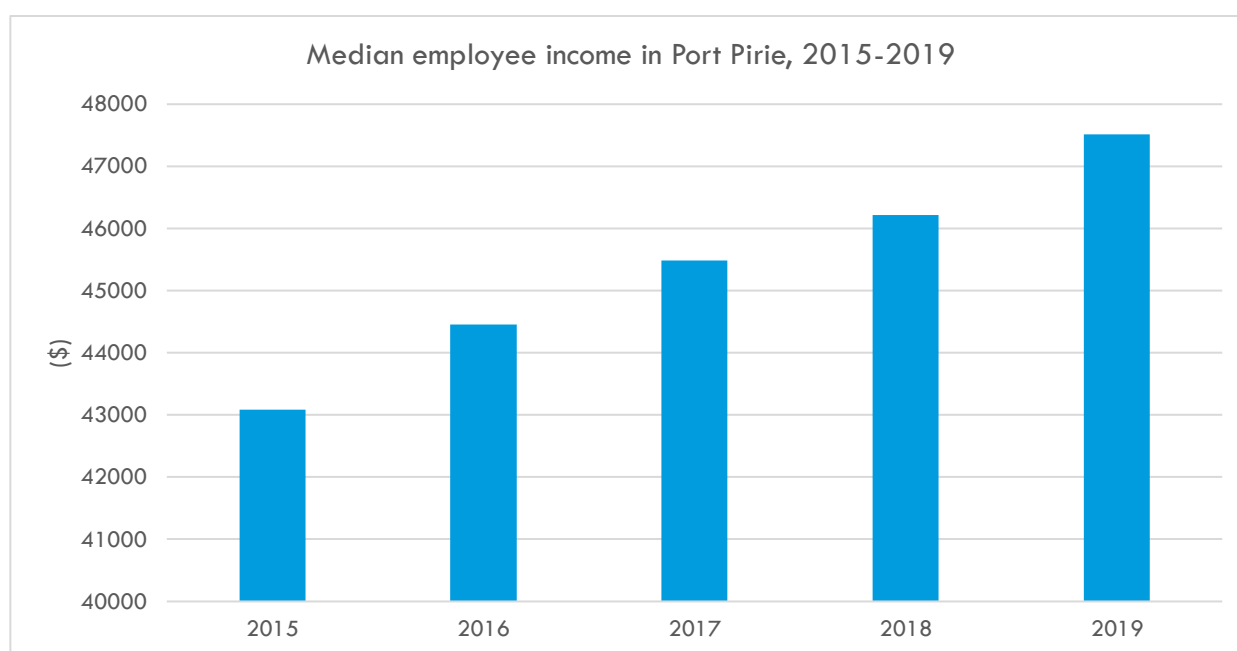
As shown in Figure 8, the median income of employees has steadily increased from \$43,090 in 2015 to \$47,510 in 2019, indicating a trend towards a better quality of work in the LGA. This has been despite an increase in the unemployment rate during this period, which should have indicated at least a more

⁶TAFE SA. (2022) TAFE SA in Port Augusta. https://www.tafesa.edu.au/locations/far-north/port-augusta?gclid=CjwKCAjws--ZBhAXEiwAv-RNL87RrcmLKauq380qyADfsgY06DAL75M1-GqLgAz7o64_MbnfhTaYMxoCjGIQAvD_BwE

⁷ UniHub Spencer Gulf. (2022). How does the Uni Hub work. <https://unihubsg.org/how-does-it-work/>

moderate if not a declining median income as there would be less competition in the labour market. However, this is still slightly lower than the South Australian median income of \$49,888. In conjunction with this, the proportion of full-time employment from 2011 to 2016 has been greater than part-time employment (60% full-time to 40% part-time), and more full-time employment tends to indicate better stability for employees. However, over this period (which included the downturn of the mining boom), the proportion of full-time employees declined to 57%. Again, the growth in median income appears to have stood up to this trend. The *Mid North South Australia Local Jobs Plan* also noted the increased casualisation of jobs in this region, noting the move to greater contracting in the Agriculture, Forestry and Fishing industry as an example.

Figure 8 Median employee income - Port Pirie, 2015 to 2019



INDUSTRY

ECONOMIC OUTPUT

From 2018/19 to 2020/21 Port Pirie's economic output has been substantially dominated by the Manufacturing industry (see Figure 9). Its output, however, was negatively affected by the COVID-19 outbreak occurring since March 2020 and has not completely recovered. Manufacturing output declined from \$761million in 2018/19 to \$614 million in 2020/21. The Construction, Transport, Postal and Warehousing, Professional, Scientific, and Technical Services, and Public Administration and Safety industries have shown similar downward trends in output.

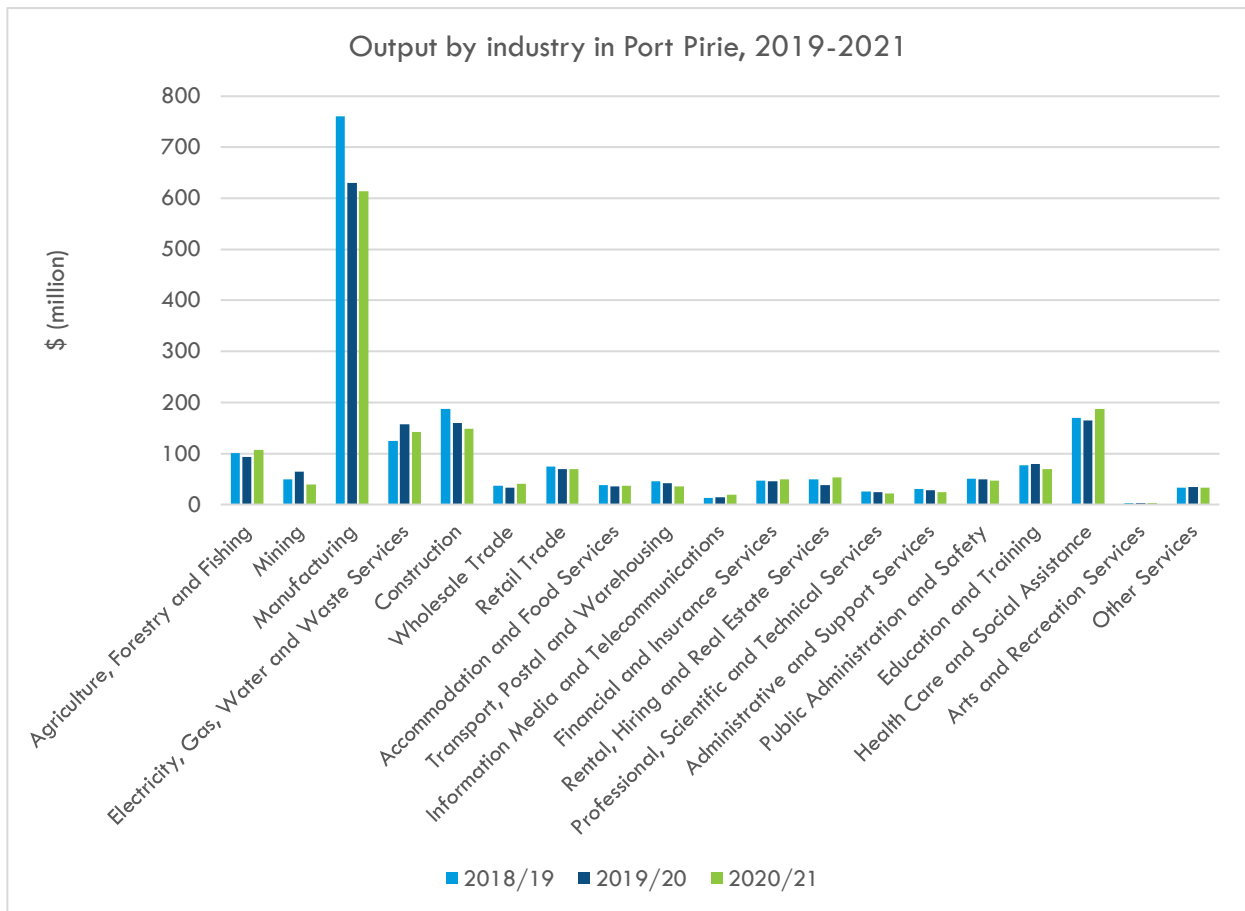
However, some industries have been resilient to the COVID-19 pandemic and other factors affecting the region over the last three years. The value of output in the Agriculture, Forestry and Fishing industry has grown to \$107.4million, from \$100.2million, while Wholesale Trade has increased from \$36.2 million to \$40 million, and Health Care and Social Assistance has increased from \$170.2 million to \$187.5 million.

The driver of the significant manufacturing output in the LGA is Nyrstar Australia's Port Pirie Smelter, which is one of the world's largest multi-metal smelters and employs approximately 800 people.⁸ The *Transforming the Upper Spencer Gulf* paper noted the importance of the smelter and its recent upgrades which have advanced its capabilities in multi-metal processing and 'e-waste recycling'.

This paper also noted the opportunities for Port Pirie to grow its Transport, Postal and Warehousing industry through greater utilisation of the Port Pirie port. While options have been drafted, it is unknown if this has been pursued.

⁸ Nyrstar. (2022). *Nyrstar Port Pirie*. <https://www.nyrstar.com/operations/metals-processing/nyrstar-port-pirie>

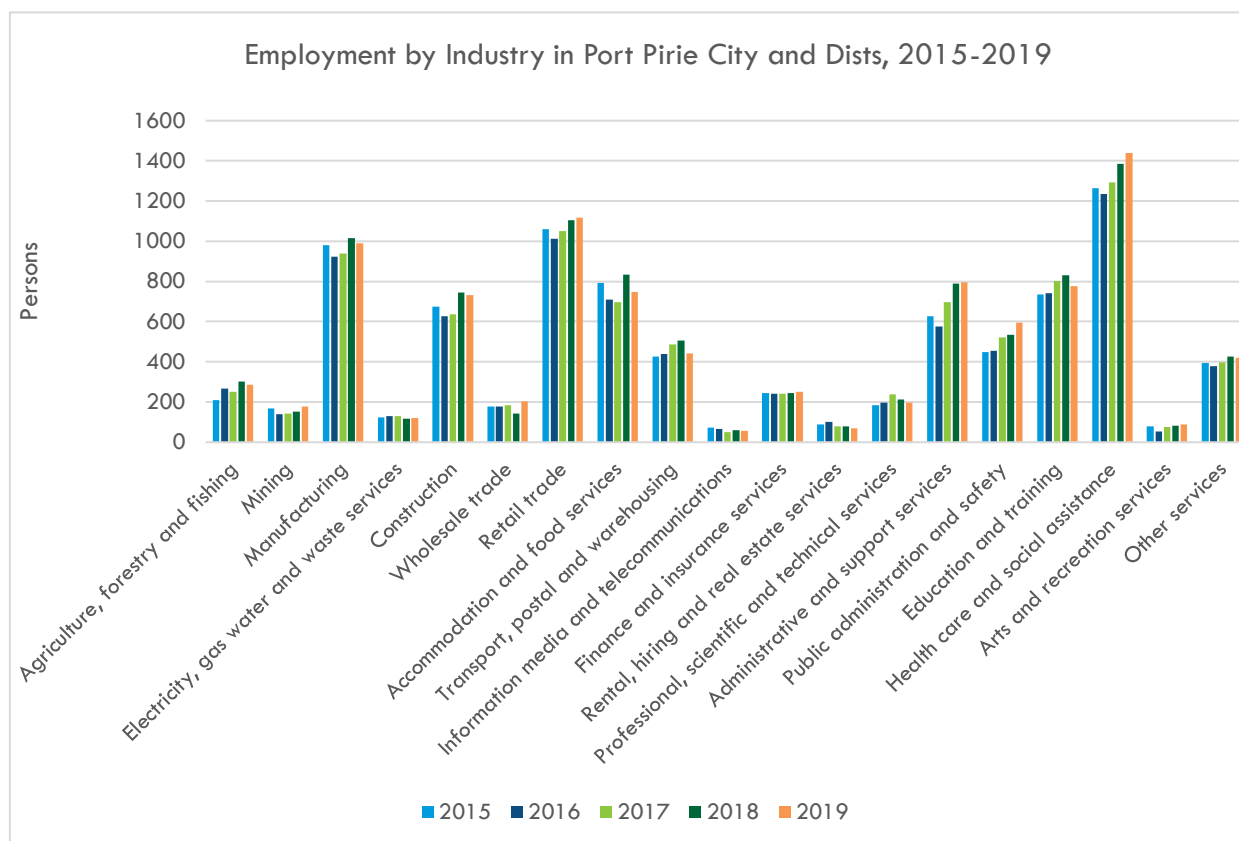
Figure 9 Output by industry - Port Pirie, 2019 to 2021



INDUSTRY OF EMPLOYMENT

In Port Pirie, while Manufacturing is the largest industry by output, Health Care and Social Assistance is the largest industry by employment with 1,549 workers in 2020/21, an increase of nearly 100 workers from 2018/19 (see Figure 10). This is the only industry in the LGA that has shown employee growth above pre-pandemic levels. However, the Manufacturing industry, the second largest industry by employment with 1,159 employees, only experienced a small decline from 1,169 in 2018/19, indicating that while Manufacturing output declined, the industry largely held onto its workforce. According to the [Local Jobs Plan – Mid North South Australia](#), it is expected that this industry will continue to be the major component in Port Pirie employment through both the Port Pirie Smelter and CirPro (previously Pirie Meats). However, this reports also notes the demand for construction workers, in line with both the local and regional infrastructure projects in the pipeline (see Pipeline section) and housing demand (see next section), as well as operations and maintenance staff.

Figure 10 Employment by industry - Port Pirie, 2018/19 to 2020/21



BUSINESSES

In 2019 there were 937 registered businesses in Port Pirie which declined to 910 in 2021 (see Figure 11). Figure 12 shows that the Agriculture, Forestry and Fishing, Construction, and Rental, Hiring and Real-estate Services have the most businesses, whilst being relatively low employing industries. This indicates that large proportions of employees and output i.e., in the manufacturing industry which has 34 businesses and accounts for over \$700million in output, are held by a small number of businesses, potentially increasing Port Pirie’s exposure to industry shocks. Whilst the Health Care and Social Assistance industry has increased in both output and employee numbers, it has declined in the number of registered businesses, indicating a consolidation of this industry.

The combination of the LGA’s large number of agriculture businesses and significant manufacturing capabilities have been previously noted in the *Transforming the Upper Spencer Gulf* paper, which highlighted the opportunity for value-adding to create premium agricultural products, such as is planned by CirPro in the development of their new livestock processing facility in Port Pirie⁹. The paper also noted the emerging agricultural innovation and research ecosystem in the region.

⁹ Seimens. (2021). CirPro (Australia) on the journey to Industry 4.0 with Siemens. <https://new.siemens.com/au/en/company/press-centre/2021/cirpro-australia.html>

The Manufacturing, Wholesale Trade, Financial and Insurance Services, Professional, Scientific and Technical Services, Information, Media and Telecommunications, and Other Services industries all appear to have more businesses in the region in 2021 than prior to COVID-19 in 2019, indicating business confidence in the Port Pirie commercial market. This may in turn influence population and workforce growth, particularly if these businesses need to recruit staff from outside the region.

Figure 11 Registered businesses - Port Pirie, 2019 to 2021

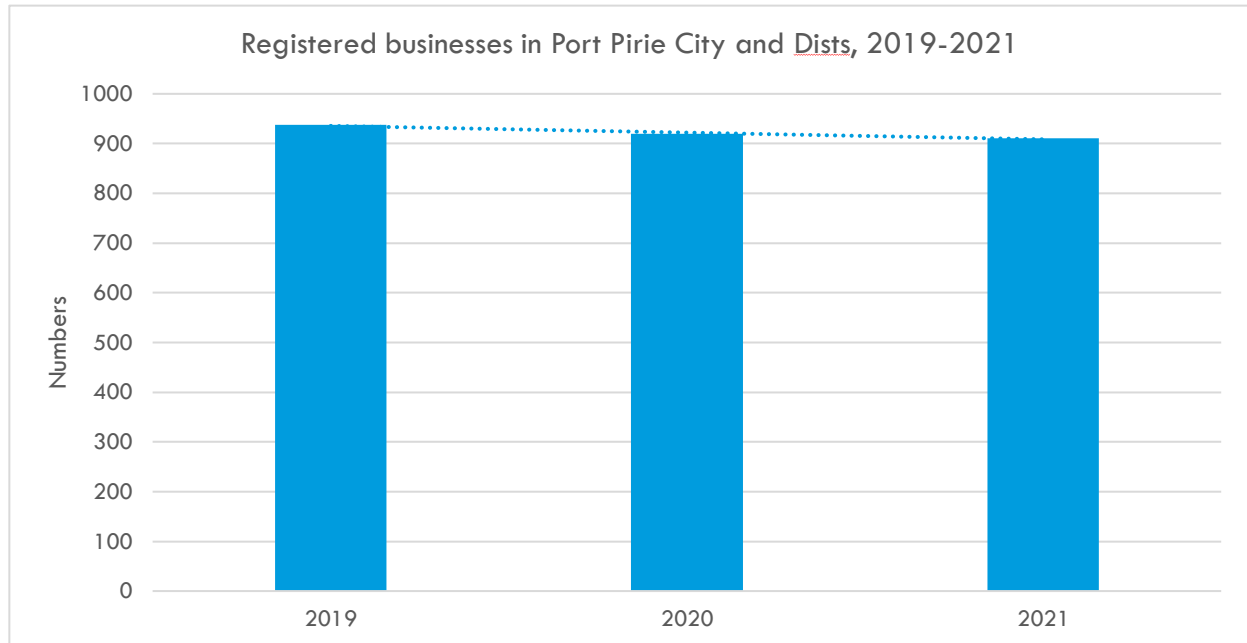
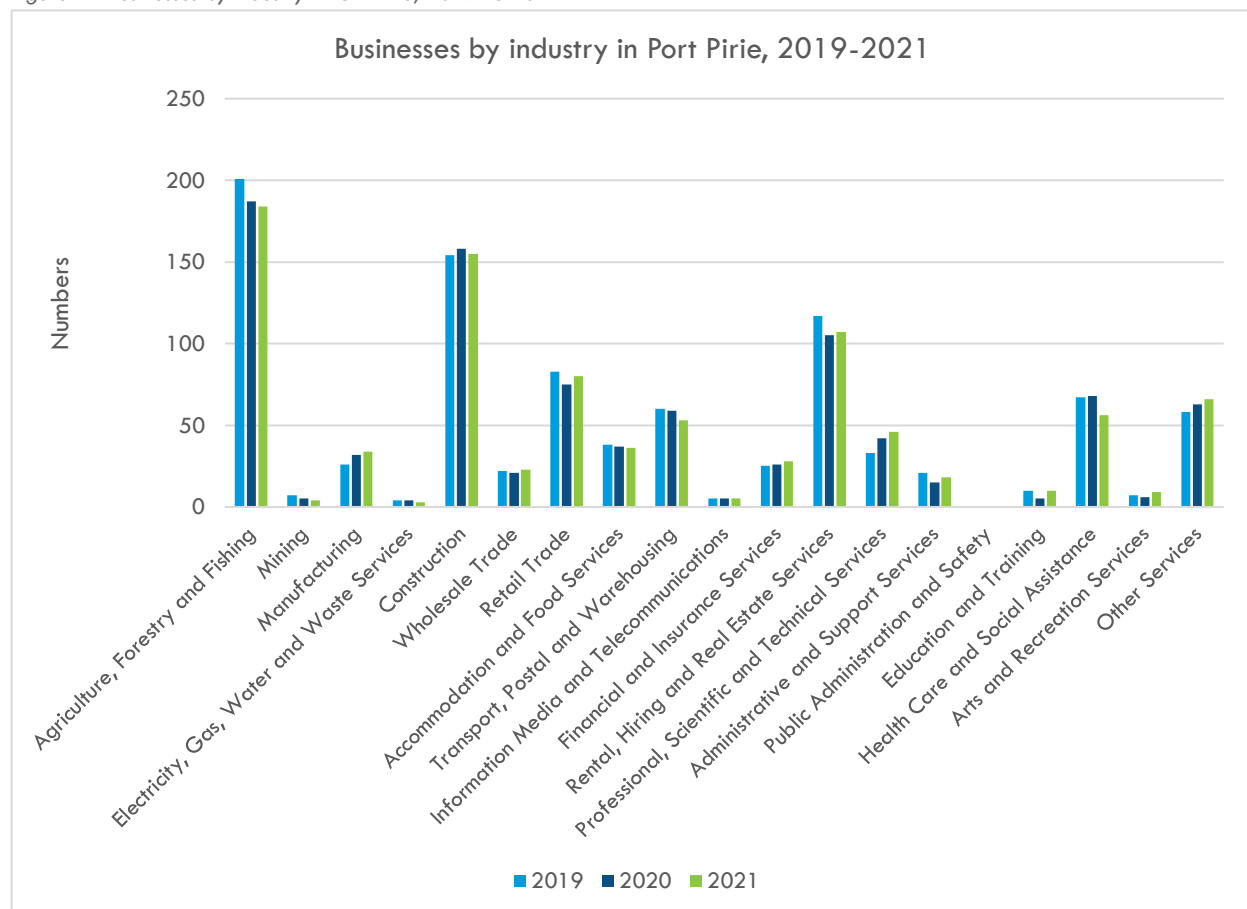


Figure 12 Businesses by industry - Port Pirie, 2019 to 2021



It should also be noted in the *Transforming the Upper Spencer Gulf* paper, that Port Pirie, as well as Port Augusta and Whyalla, have only an average or low capacity in fast growing industries such as health, education, profession, scientific and technical, and telecommunications industries. This would limit economic performance over the next five years. However, given the growing number of businesses in these areas, it would appear that Port Pirie has begun diversifying its economy in line with this need.

HOUSING, EDUCATION AND HEALTH

RENTAL AND SALES MARKETS

Looking back over the last 10 years, the availability of rental properties has been declining in Port Pirie since 2016, however this decline sharpened in early 2019 (see Figure 13). At the same time median rental prices which had been holding steady until mid-2021, began to increase to a high of \$240. The vacancy rate of rental properties has been varied over the last decade, however in line with the reduction in the number of rental properties in the market, it has declined to a decade low of 0.4% this year, well below the minimum 3% needed (see Figure 14).

Figure 13 Rental Market (12 months) - Port Pirie, 2013 to 2022

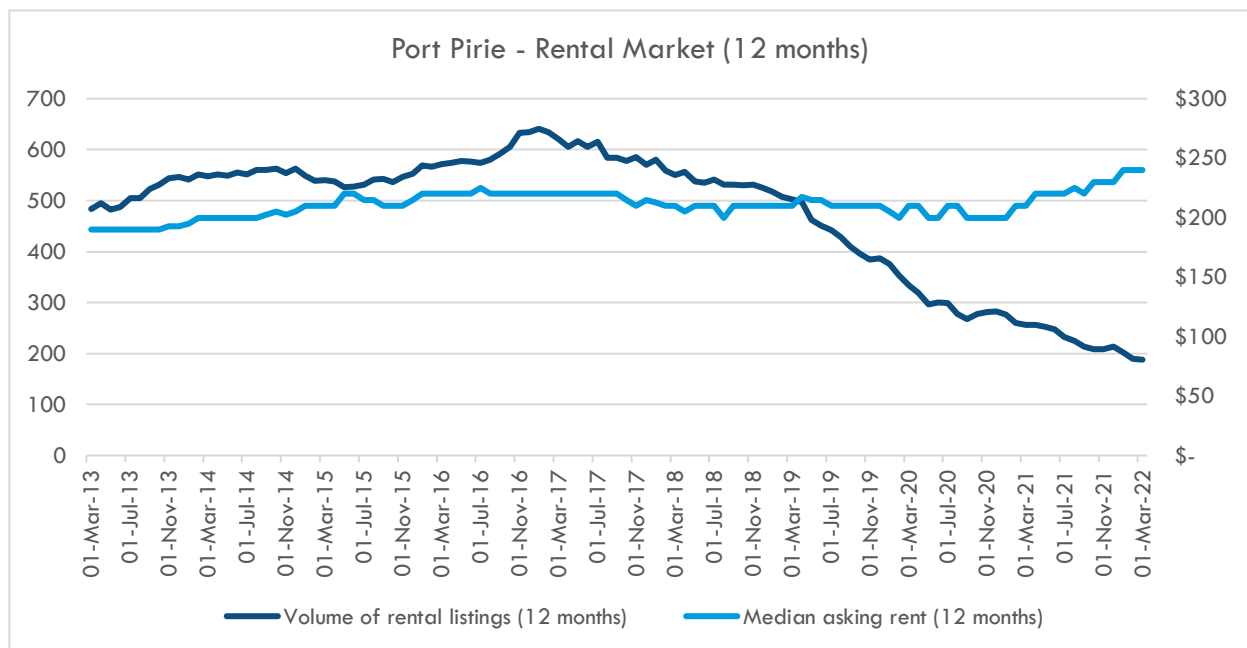
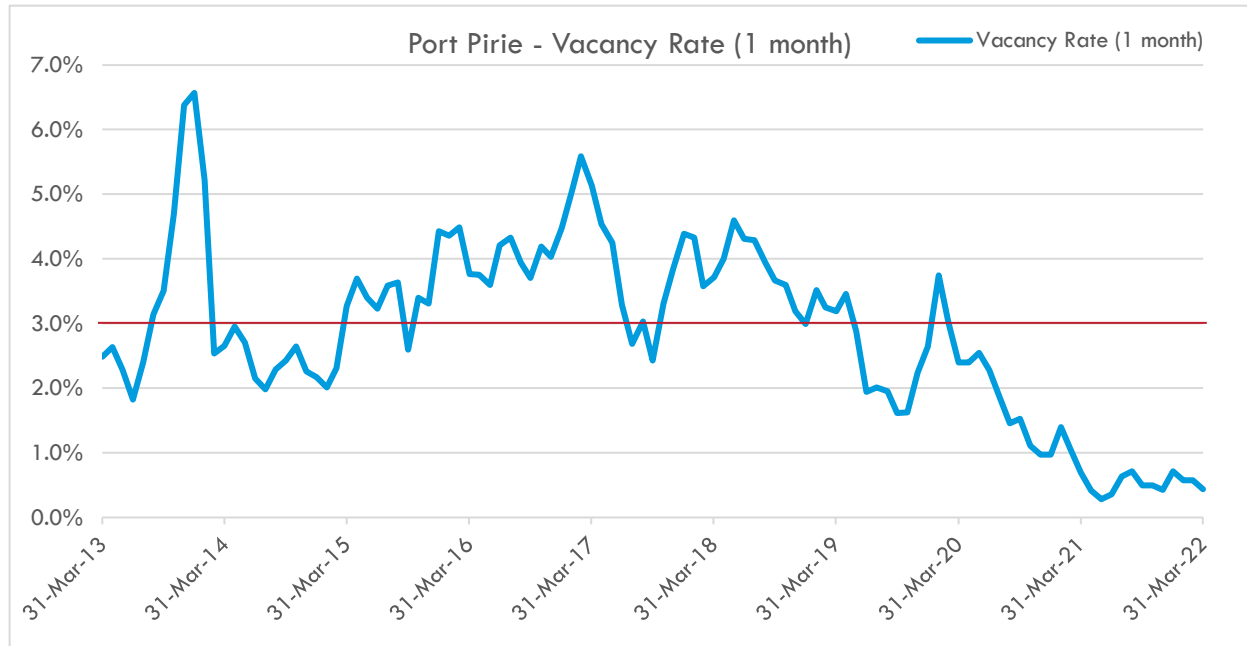


Figure 14 Vacancy Rate (1 month) - Port Pirie, 2013 to 2022



The volume of sales in this same period held relatively stable until early 2021, with some decline experienced up until early 2017. Median sale prices had generally been trending downward from a high in mid-2014, with some price spikes, however in line with the volume of sales, median sales prices have lifted back to the 2014 high of \$180,000 (see Figure 15). Further, the sales prices for dwellings in the 75th percentile, (see Figure 16, are now at a record high of \$269,500, indicating that high-value homes are now much more valuable than they have been in the past 10 years.

Together these indicators show that market demand in Port Pirie is back up to, if not higher than, in the mining boom years. Both the number and availability of rentals in this market are lower than experienced at the end of the mining boom (2013), with the significant number of sales which have been more intense than during the boom, likely pulling properties out of this market. These trends are despite the decline in population since 2015, indicating that the increase in sales is likely due to the low median house price, that combined with low interest rates and increasing median incomes in the region, are drawing buyers to the sales market. This is potentially out of the rental market.

Figure 15 Sales Market (12 months) - Port Pirie, 2013 to 2022

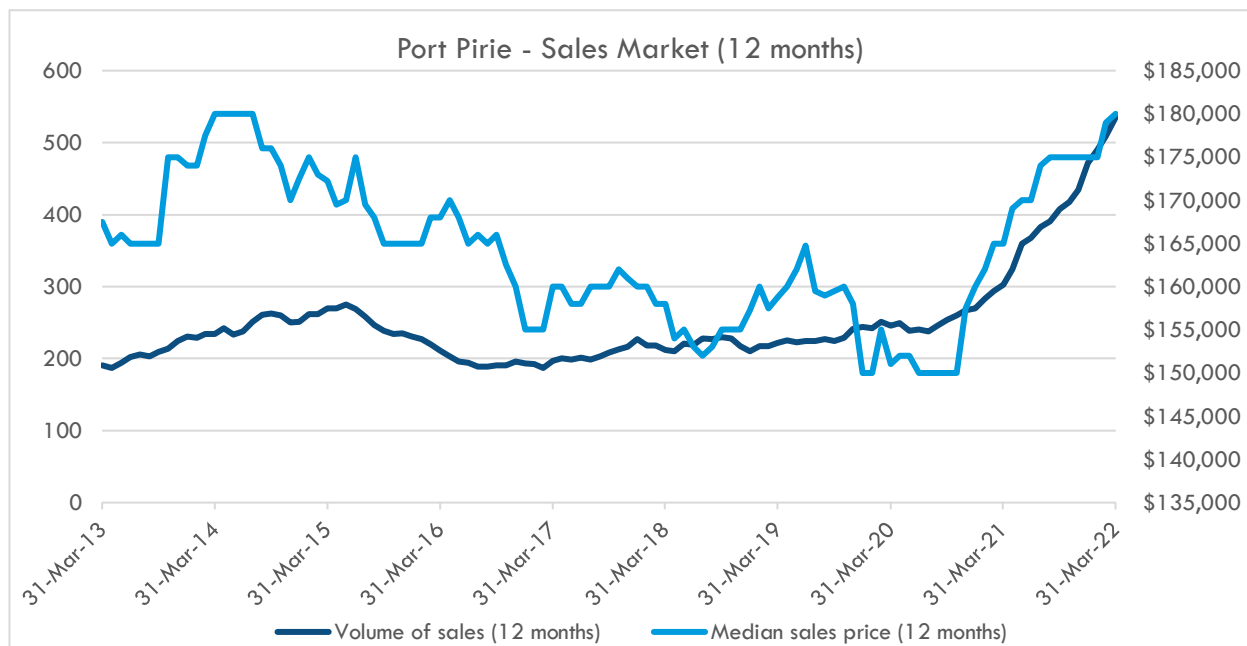
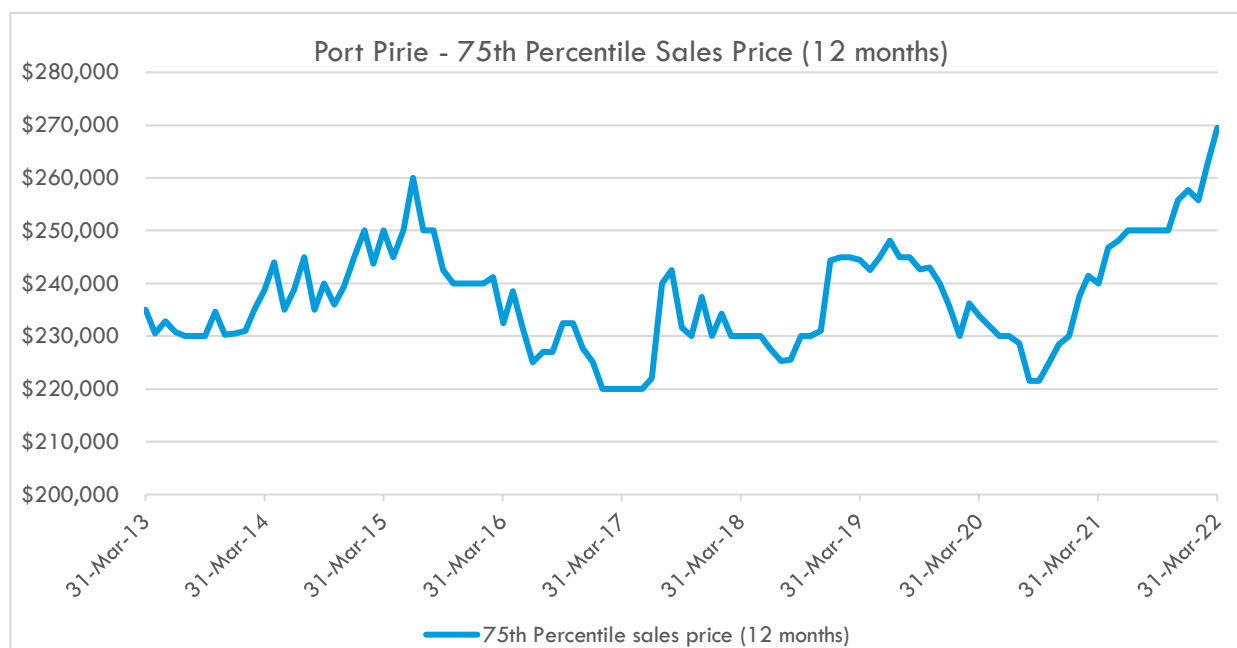


Figure 16 75th Percentile Sales (12 months) - Port Pirie, 2013 to 2022



Further, the **Spencer Gulf Housing Survey Report**, released in March 2022, highlighted an increasing demand for housing in the Port Pirie LGA from a number of parties, including:

- Investors
- First home buyers
- Parents purchasing for their children, and
- Grey nomads seeking a base.

However, the report also notes that while demand had risen considerably in Port Pirie, it is starting from a low base and that the market has previously experienced an oversupply – as such demand and prices are only just rising back up to that seen a decade ago. Whilst median prices are still not considered high, there is concern about the lack of crisis housing in this LGA to support low-income families. This is leading families to spend extended periods of time in caravan parks and motels when they can no longer access the private market.

This report also noted that the Government Employee Housing (GEH) Program in Port Pirie which provides accommodation for eligible government employees, is currently at full capacity. This is in conjunction with the low number of rentals available (and the low vacancy rate) which is making it difficult to meet demand.

BUILDING APPROVALS

In line with the increase in demand in both the rental and sales markets in Port Pirie, building approval values have been fluctuating over the past ten years, but have showed an increasing trend during 2020-21, including for Residential building approvals (see Figure 17). Both non-residential building approvals and residential approvals jumped in 2020-21, after hitting a nearly 20 year low in 2019-20. The steady increase in value of building approvals indicates confidence in the market and will likely lead to an increase in the quality and quantity of the housing stock in this LGA. This will continue to support the Construction industry in the LGA.

However, data from CoreLogic indicates that the value of residential building in Port Pirie is still low, at \$711 per capita¹⁰. For context, the highest value of residential building work per capita is in Robe at

¹⁰ This is based on June 2021 approval and 2020 estimated residential population figures

\$12,503 and the lowest, Peterborough at \$7 per capita.

The **Spencer Gulf Housing Survey Report** identified that Port Pirie experienced a small spike in single house developments in 2020/21, which the report attributes to COVID-19 stimulus (both State and Federal). The report further concludes that there is likely to be gradual increases in the volume of development approvals.

In relation to land availability, the **Spencer Gulf Housing Survey Report** noted that Port Pirie has some underdeveloped and suitably zoned residential land that has the potential for infill development across a range of housing types. This includes land proactively zoned by the local Council for residential and deferred residential development, for between 500 and 600 allotments. However, as is common with many regional places, the available and zoned land requires significant infrastructure and water services augmentation before it is ready for development.

There may also be the opportunity to re-develop now-vacant land in Pirie West, a suburb with previously high lead exposure, where the State Government has purchased and demolished affected housing. The availability of State and other owned vacant and zoned land in Port Pirie is considered sufficient for future development needs, and no further re-zoning needed. However, this report also noted the lack of available builders to build new houses, with a three year waitlist. This is in-line with both the increase in building approvals and decline in the number of people employed in the Construction industry which would be driving this delay.

Figure 17 Value of total building approvals - Port Pirie, 2001/2 to 2021/22. Source: Economy ID



EDUCATION AND HEALTH SERVICES

Port Pirie has eight primary and secondary schools, of which six are public and two are private. The two private schools are St Mark’s College, a catholic co-educational school providing for years R to 12, and Mid North Christian College, which provides co-education for years R to 12. Port Pirie also has a school specialising in education for R to 12 students with a range of abilities and disabilities, the Mid North Education Centre¹¹.

The major health facility in Port Pirie is the Port Pirie Regional Health facility, with services that include¹²:

- Accident and emergency services

¹¹ Australian Curriculum, Assessment and Reporting Authority. (2022) My School. <https://www.myschool.edu.au/>

¹² SA Health (2022). Port Pirie Regional Health Facility.

<https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/services/hospitals/regional+hospitals+and+health+services/ynln+hospitals+and+health+services/port+pirie+regional+health+service/port+pirie+regional+health+service>

- Medical and surgical
- Renal dialysis
- Cardiac rehabilitation program
- Chemotherapy services
- Obstetrics and maternity
- Lymphoedema service
- Aboriginal health team
- Do it for life initiative
- Child and family health
- Well women's clinic
- Movers and groovers initiative
- Environmental health care
- Aged care assessment and support service
- Residential aged care
- Community health services

Primary health care in Port Pirie is delivered through the three General Practices¹³ (all of which bulk bill) and a range of allied and community health providers including dentists, orthodontists, physiotherapists, optometrists, and four pharmacies. The *Transforming the Upper Spencer Gulf* paper noted Port Pirie's role as a health and education service centre (in conjunction with Port Augusta and Whyalla).

¹³ Health Direct. (2022) General Practice Port Augusta https://www.healthdirect.gov.au/australian-health-services/results/port_augusta-5700/tihcs-ah-11222/gp-general-practice?pageIndex=1&tab=SITE_VISIT

PORT AUGUSTA

SUMMARY

- The Port Augusta LGA is experiencing a decline in both its overall population and working age population. The LGA has relied on overseas migration and natural increases to drive population growth, however this has been significantly outweighed by losses from internal migration.
- However according to the RAI's *Regional Movers Index*, Port Augusta is experiencing growing migration from urban areas, indicating that its internal migration trends may be changing.
- Further, the Indigenous population has shown some growth over the last 10 years, and the working-age population in particular has grown to 71% of the Indigenous population.
- The Port Augusta LGA has consistently had a higher unemployment rate than South Australia. Whilst the working-age population is declining, and migration is limited, there may be some untapped capacity in the local labour force to fill vacancies arising from the region's projects pipeline.
- Further approximately 19% of the LGA's population are Indigenous and yet a disproportionate number of Indigenous people make up employment service caseloads – approximately 30%.
- The opportunity is therefore to engage these groups in the workforce to support the large number of projects planned for the LGA, including 10 energy projects at varying stages of development and approval.
- With this in mind, the LGA needs further training and job-readiness support to ensure this latent workforce can be activated and trained to meet specific workforce needs. There have been positive steps in developing the region's training and skills ecosystem in the implementation of the UniHub in Port Augusta in 2020. There is also a growing primary and secondary education offerings in Port Augusta, which currently provides nine public and two private schools catering for years R to 12.
- Growth in the skills and capacity of both employees and businesses will be a significant factor in the LGA's ability to take advantage of growth opportunities. It has been noted that this LGA needs to focus on building business networks and industry links to maximise engagement with the pipeline.
- While the LGA's population has declined, demand for housing has grown significantly since the COVID-19 pandemic, with the number of available properties for rent dropping to 1.8%, below the minimum of 3% usually needed in a market.
- This demand has been driven by the incoming and often short-term Construction industry workforce, which has driven median rent prices to highs not seen in the region since 2013.
- However, the sales market has not been as tight – whilst sales listings have increased dramatically since the COVID-19 pandemic, they were previously holding relatively steady. It is noted that the short-term nature of the workers coming into Port Augusta is impacting the steadiness of this market. This is subsequently impacting on how this market is being assessed for finance – limiting access to owners in this market.
- There is the opportunity for further housing development, with the availability of appropriately zoned land in Port Augusta, however there is a considerable wait time for building services.
- Health services in Port Augusta include primary and tertiary services, as well as a range of allied health services and specific Indigenous health services. This includes bulk billing GP practices.

PIPELINE

The pipeline of projects for the Port Augusta LGA is extensive. The following are some of the large Infrastructure, Manufacturing, Mining and Renewable and other projects that have been approved or are under assessment for Port Augusta. Of the 17 projects listed below, 10 are energy projects, valued at \$1.6billion.

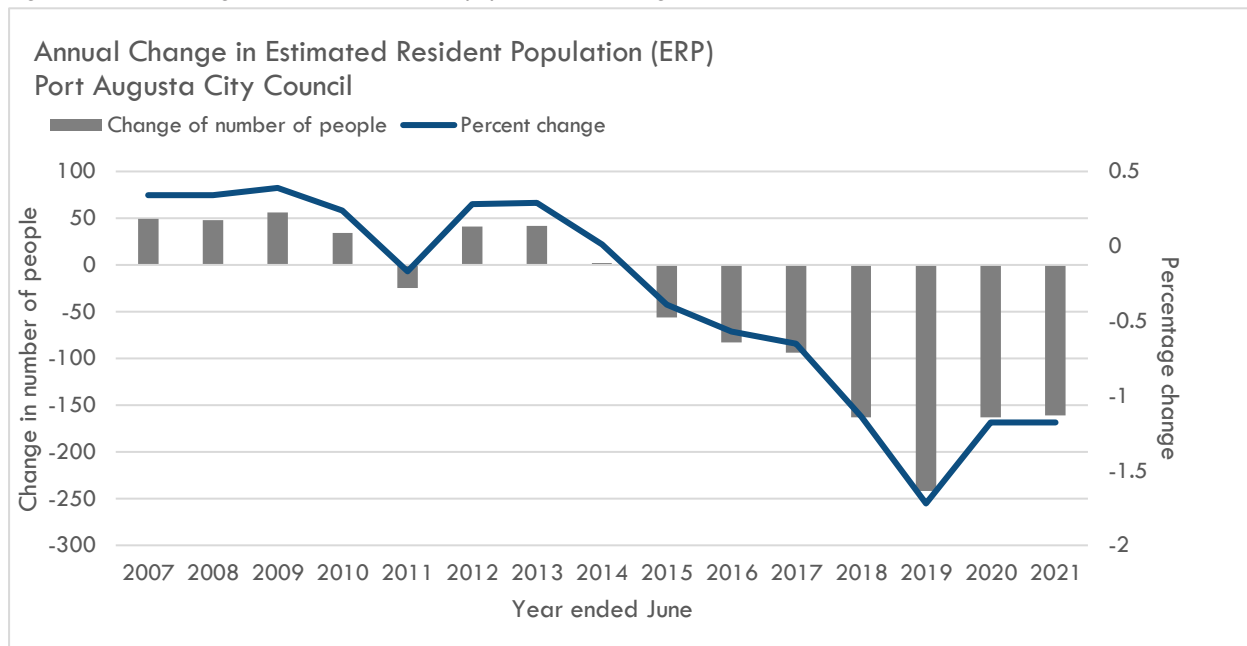
Table 4 Infrastructure pipeline - Port Augusta

Project	Sector	Value	Jobs	Source
1. Bunnings	Retail	\$4m	77 construction, 46 ongoing	Spencer Gulf Cities Housing Report

Project	Sector	Value	Jobs	Source
2. Port and Bulk Handling Facility and Ancillary Infrastructure	Transport and Warehousing	\$40m	150 construction, 136 ongoing	Spencer Gulf Cities Housing Report
3. Nexif Energy Wind Farm – Stage 3	Energy	\$506.6m	58 construction, 2 ongoing	Spencer Gulf Cities Housing Report
4. Silicon Aurora Solar Thermal Power and Solar Farm	Energy	\$300m	246 construction, 51 ongoing	Spencer Gulf Cities Housing Report
5. Altura Group Fresh Water Pumped Hydro	Energy	\$350m	200 construction, 26 ongoing	Spencer Gulf Cities Housing Report
6. Pangea Energy Solar Farm	Energy	\$380m	250 construction, 20 ongoing	Spencer Gulf Cities Housing Report
7. Surpass Energy Solar Farm	Energy	\$6.5m	10 construction	Spencer Gulf Cities Housing Report
8. SA Regional Solar Farm	Energy	\$250k	10 construction	Spencer Gulf Cities Housing Report
9. SIMEC Battery Storage	Energy	\$100m	50 construction, 5 ongoing	Spencer Gulf Cities Housing Report
10. Yates Electrical Service Solar Farm	Energy	\$4.9m	15 construction	Spencer Gulf Cities Housing Report
11. Yates Electrical Service Solar Farm	Energy	\$1m	15 construction	Spencer Gulf Cities Housing Report
12. Mixed use neighbourhood centre (including retail)	Retail	\$6.3m	58 construction, 22 ongoing	Spencer Gulf Cities Housing Report
13. Golden Invest Solar Panels	Energy	\$2m	2 construction	Spencer Gulf Cities Housing Report

POPULATION

Figure 18 Annual change in estimated residential population - Port Augusta, 2007 to 2021



As shown in Figure 18, the estimated residential population of the Port Augusta LGA in 2021 was 13,356, and has been in decline since 2014, when it reached a high of 14,498. The *North West Country Local Jobs Plan* (released in April 2022) also notes that 19.1% of the population are Indigenous, whilst the 2021 Census shows 20.4% of the population, an increase of 3.5 percentage points since 2011 (see Figure 19). This downturn in the LGA's population was most severe in 2019, prior to the COVID-19 pandemic, and can most likely be attributed to the closure of the Alinta Energy coal-fired power station and the general downturn in the mining industry. However, it does appear that the pandemic has contributed to the decline in overseas migration, which had up until 2020/21 been a positive contributor to the LGA's population, along with the natural increases (births minus deaths) (see Figure 20). It is Port Augusta's net internal migration that has been the largest drag on its population, neutralising gains from overseas and natural increases for the last five years. Gains through births do indicate that there is some potential to grow the local population, particularly noting its increase in 2020/21. Having said this it will still be important to consider how to attract locally, and from overseas which up until the pandemic was a growing source of population.

Figure 19 Indigenous population - Port Augusta, 2011 to 2021

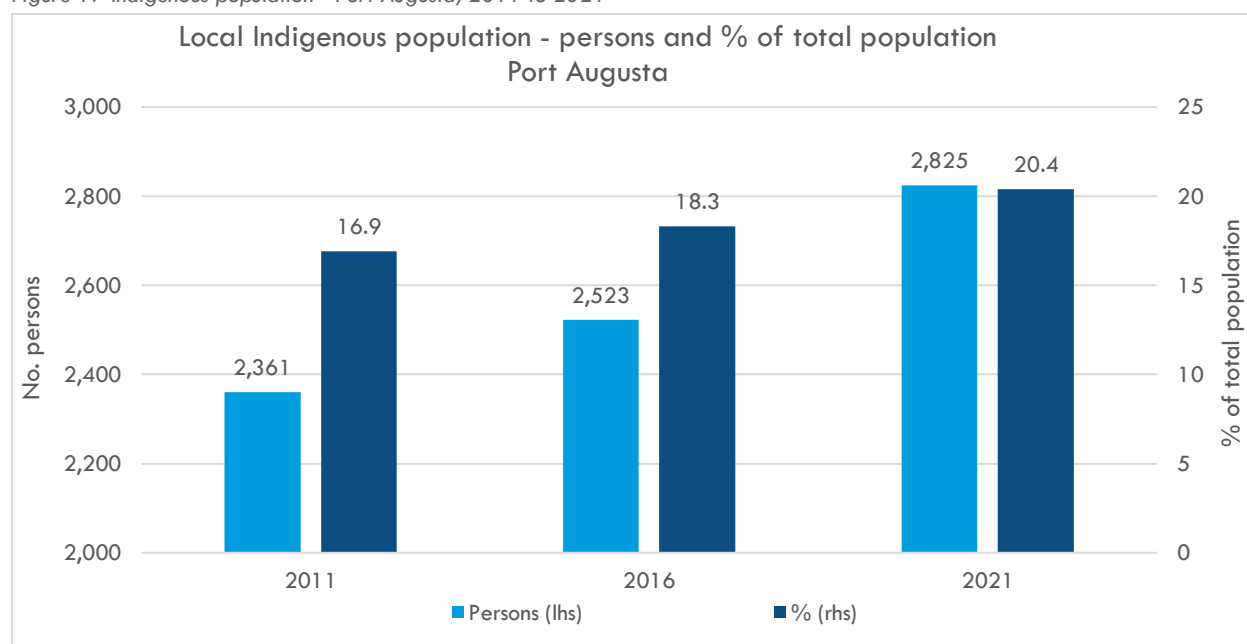
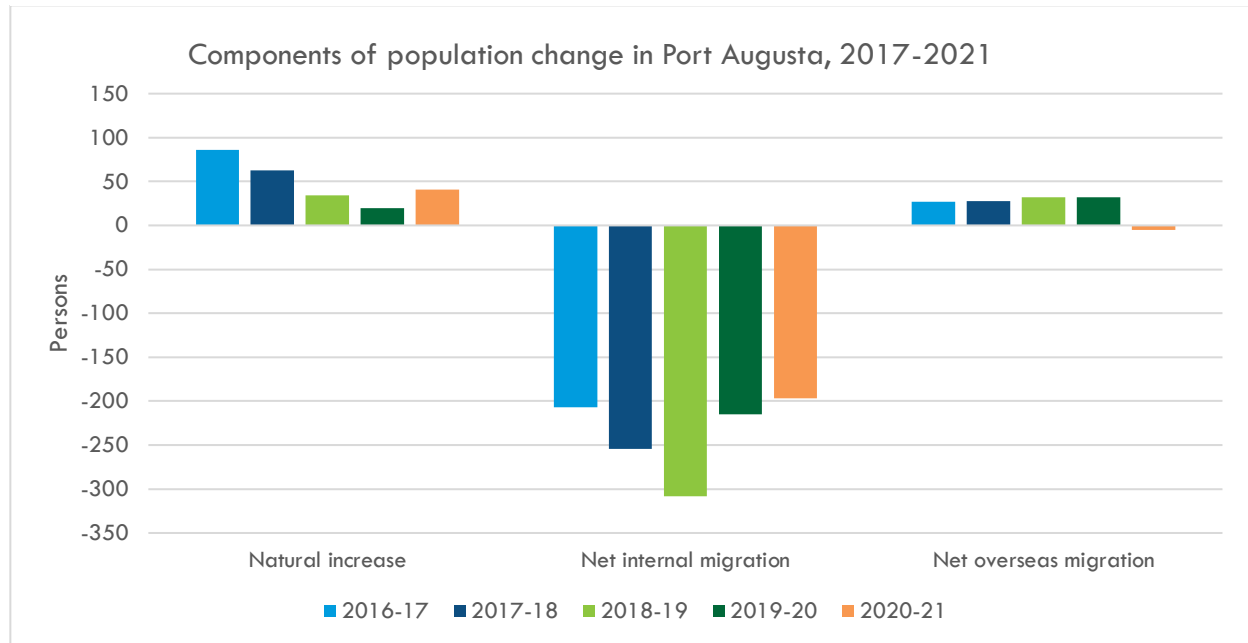


Figure 20 Components of population change - Port Augusta, 2017 to 2021



There is some evidence that Australians are moving from cities to regional areas. The RAI's **Regional Movers Index** has shown that compared to the pre-pandemic stage (before March 2020) there has been an overall 12% increase in people moving from cities to regions across Australia (see Figure 21). According to this data, Port Augusta experienced a 54% increase in people moving from urban areas to the LGA from 2020 to 2021, which is in line with the declining net loss of internal migrants in 2019/20 and 2020/21 (see Figure 22). This is a positive step towards growing the LGA's population. The Port Augusta City Council's **Strategic Directions 2019 – 2029** report has highlighted the decline in population since 1991 and sets out to reverse this trend through sustainable growth. The Council's **Four Year Action Plan** also noted the difficulty of uncertain population growth for residential and infrastructure planning.

Figure 21 Regional Movers Index: population flows from capital cities to Regional Australia, 2018 to 2022

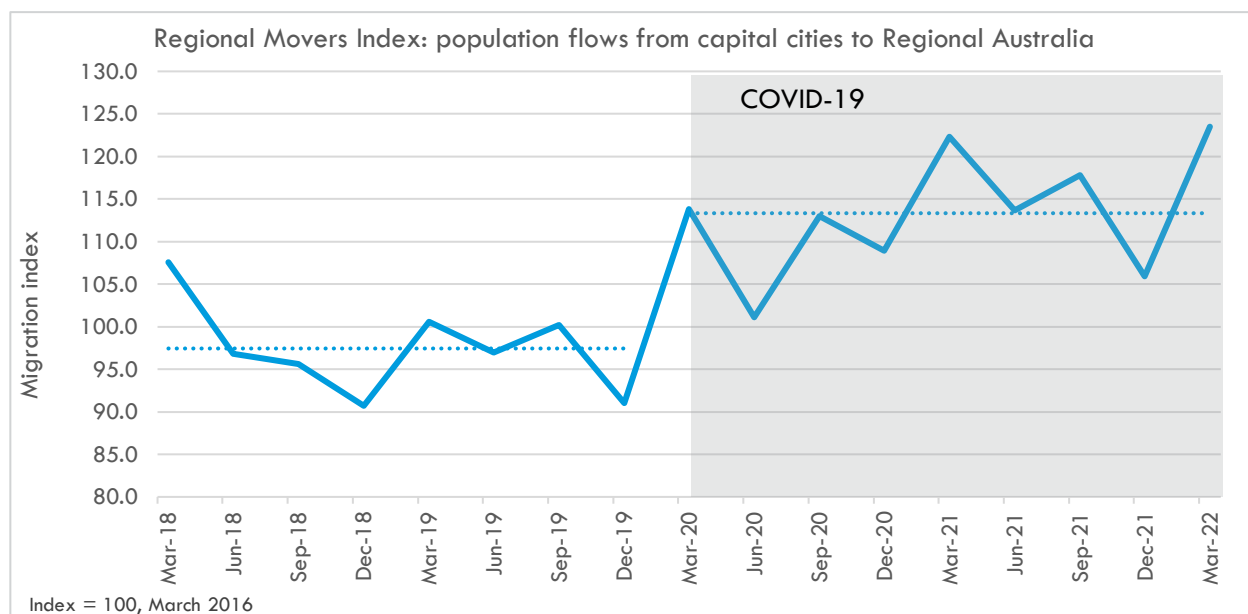
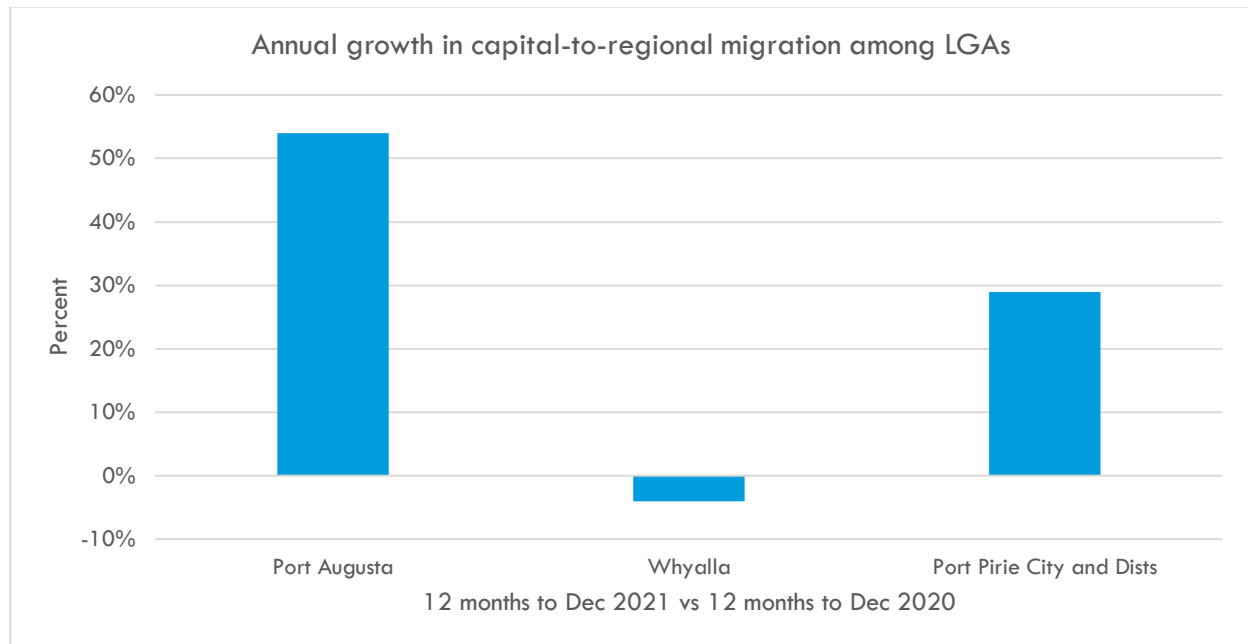


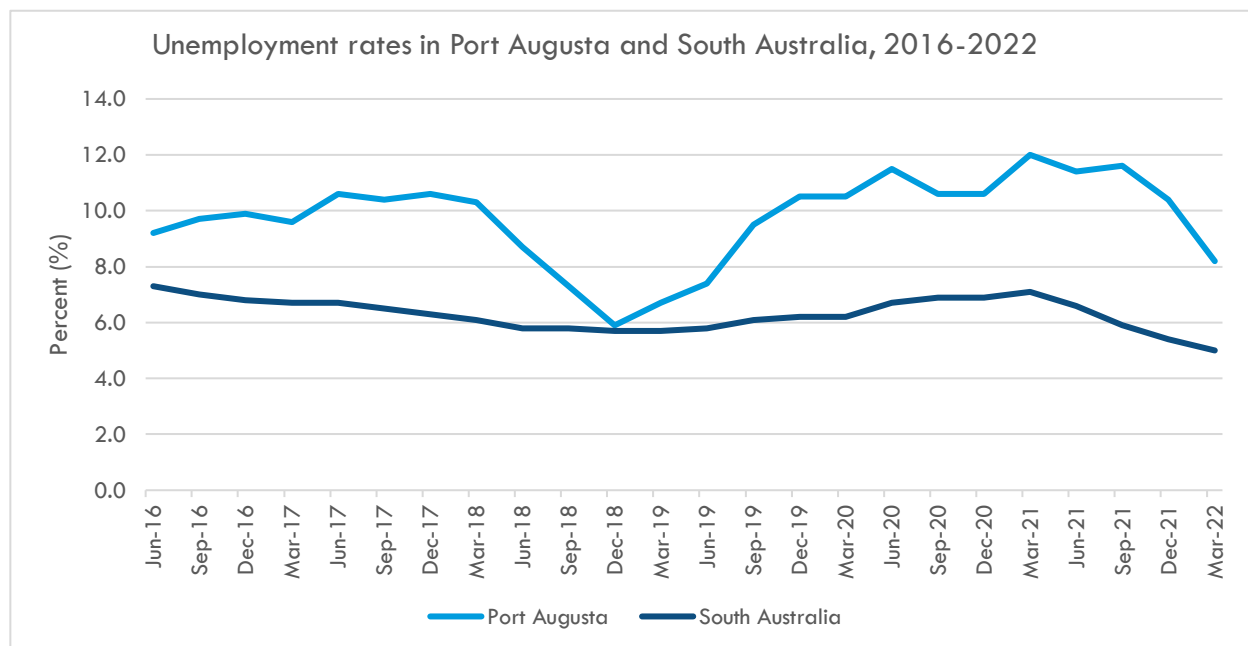
Figure 22 Annual growth in capital-to-regional migration among LGAs, 2020 to 2021



WORKFORCE

UNEMPLOYMENT

Figure 23 Unemployment rates - Port Augusta and South Australia, 2016 to 2022



As shown in Figure 23, the unemployment rate in Port Augusta has consistently been higher than that of South Australia, however it dived to a low of 5.9% at the end of 2018. During the COVID-19 pandemic the unemployment rate peaked to a five year high of 12% but has since begun to decline to just above 8%. This indicates that impacts of the pandemic on the labour market have subsided. It is also in line with the decline in unemployment rates around the state and country and increasing demand for workers.

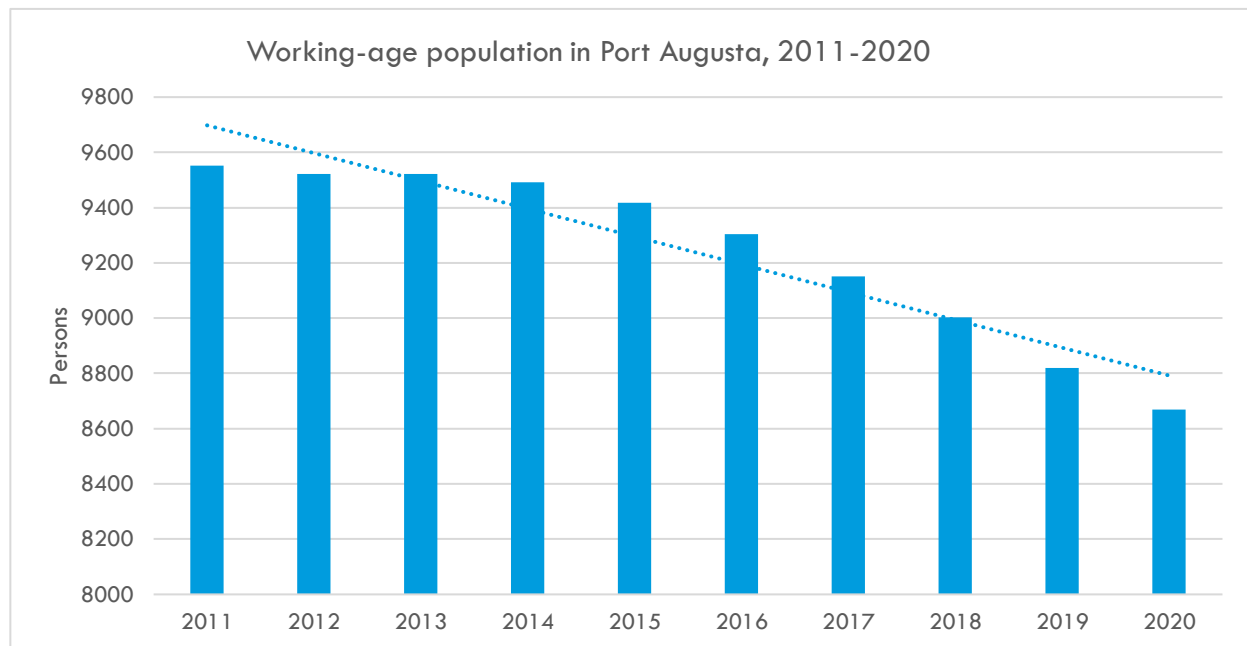
Port Augusta is a part of the North West Country Employment Region – the [North West Country Local Jobs Plan](#) notes that this region has experienced persistently high unemployment due to a disadvantaged labour market. It notes that jobseekers in this region experience greater isolation, both from employers

and services. The plan further highlights that the region has previously struggled to attract appropriately skilled workers, and is now also struggling to attract entry-level workers across a range of industries including retail, aged care, transport, and heavy industry. This is despite a higher unemployment rate in the Port Augusta LGA, reiterating the isolation and disconnect of jobseekers from employers. This plan further notes the need for employment, skills development and labour force engagement support bring down the unemployment rate over the long-term and support industry opportunities in the region.

The plan also highlights that that Indigenous job seekers are overrepresented in this region, and account for 50% of the caseload for employment services, despite accounting for only 19% of the population.

LABOUR FORCE

Figure 24 Working-age population - Port Augusta, 2011 to 2020



Along with the regional decrease in overall population, Port Augusta’s working-age population has also been in decline since 2015 (see Figure 24). This reflects the natural process of population ageing, as well as the out-migration of the local population. The Indigenous working-age population (in contrast) – has been growing since 2011 reaching some 2,015 people in 2021, or 71% of the local Indigenous population. Moreover the *North West Country Local Jobs Plan* finds that more than 40% of the Indigenous population in the region are about to enter the working-age age bracket.

Noting these trends, it will be important to engage as much of the local workforce in employment as possible to meet the demand for workers. However, the *Port Augusta Economic Growth and Investment Strategy* has also noted that Port Augusta has been the biggest exporter of workers in the region, and as such the growth or decline of the local labour force has farther reaching impacts than just the LGA. The unemployment rate in the LGA, while on a downward trend, still indicates some capacity in the labour market than can be tapped through greater engagement in employment and education.

The *Transforming the Upper Spencer Gulf* paper has previously noted the need to build local skills and capability to service growth industries, including through re-training of unemployed groups. The paper recommended the development of the Upper Spencer Gulf ‘Community Owned Tertiary Education Centre’ (COTEC) to meet local skilling needs. In the RDA Far North’s *Jobs for the Future in Regional Areas Submission* (2019), it was also noted that local businesses have at times found it difficult to take advantage of opportunities from the mining sector, as they lack the necessary skills in their staff, as well as an ability to upskill.

The UniHub opened in Port Augusta in 2020 and provides student support and a space to study a range of tertiary courses, with either UniHub partner universities delivering through the hub, or other tertiary institutions. The UniHub provides support degrees in Engineering, Business Administration, Education,

Business, Nursing, Psychological Science, Social Work, Education and Digital Media.¹⁴ This Hub provides the opportunity for Port Augusta residents to gain qualifications or re-train to meet some of the industry opportunities in the region. In terms of vocational and tertiary education services, TAFE SA has a Port Augusta campus offering courses that have been developed in collaboration with local industry, including automotive, building trades, carpentry, civil construction, community services, electrical and government¹⁵.

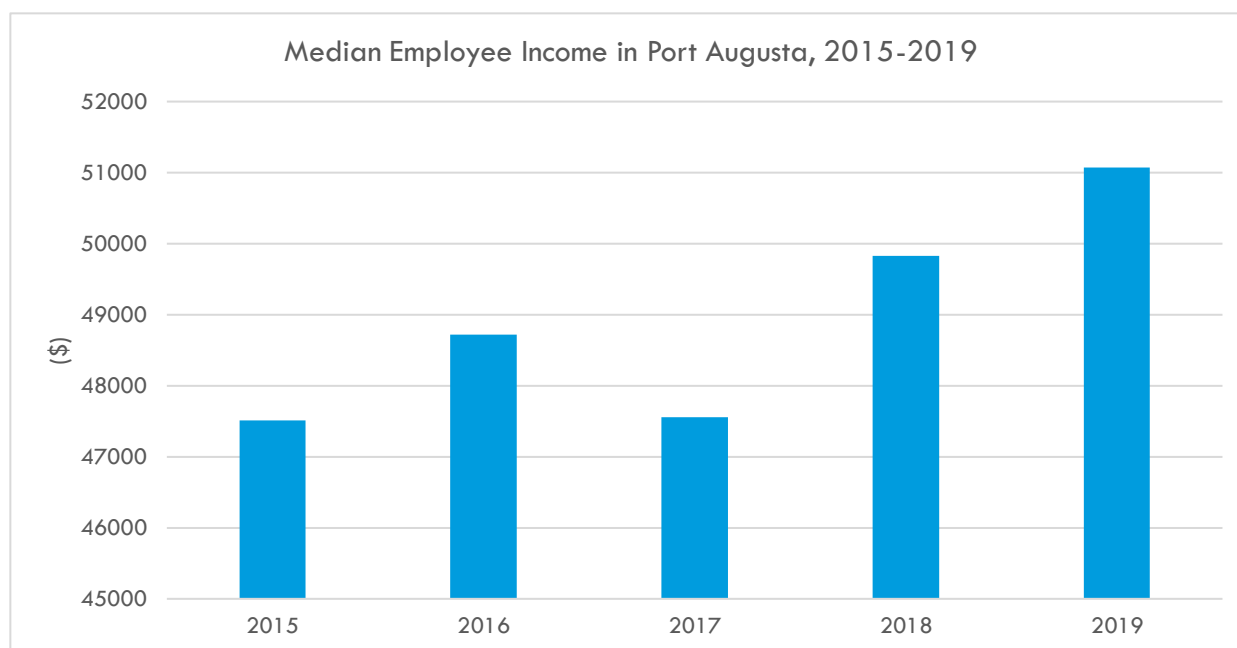
The **North West Country Local Jobs Plan** also notes presence of the Local Job Program which delivers connections skills, training programs and other support services for jobseekers, as well as the presence of government programs to support businesses and employers to invest in developing and training staff.

QUALITY OF WORK

For the most part, the median income in Port Augusta has been on an upward trend since 2015, with a small decline in 2017 (see Figure 25). This decline in median income was during a period of higher unemployment, which followed on from the Alinta Energy coal-fired power station closure, however since then median incomes have grown despite the increase in the unemployment rate. Overall, the median income has risen from \$47,509 in 2015 to \$51,073 in 2019, a 7% increase. This is slightly higher than the South Australian median income of \$49,888.

In conjunction with this, the proportion of full-time employment has been greater than part-time employment (68% full-time in comparison to 36% part-time in 2011), and more full-time employment tends to indicate better stability for employees. However, over this period (which included the closure of the Alinta assets and the general downturn in the mining boom), the proportion of full-time employees declined to 64% and part-time increased to 32%. Again, the growth in median income appears to have stood up to this trend.

Figure 25 Median employee income - Port Augusta, 2015 to 2019



¹⁴ UniHub Spencer Gulf. (2022). How does the Uni Hub work. <https://unihubsg.org/how-does-it-work/>

¹⁵TAFE SA. (2022) TAFE SA in Port Augusta. https://www.tafesa.edu.au/locations/far-north/port-augusta?qclid=CjwKCAjws--ZBhAXEiwAv-RNL87RrcmLKauq380gyADfsgY06DAL75M1-GqLgAz7o64_MbnfhTaYMxoCjGIQAvD_BwE

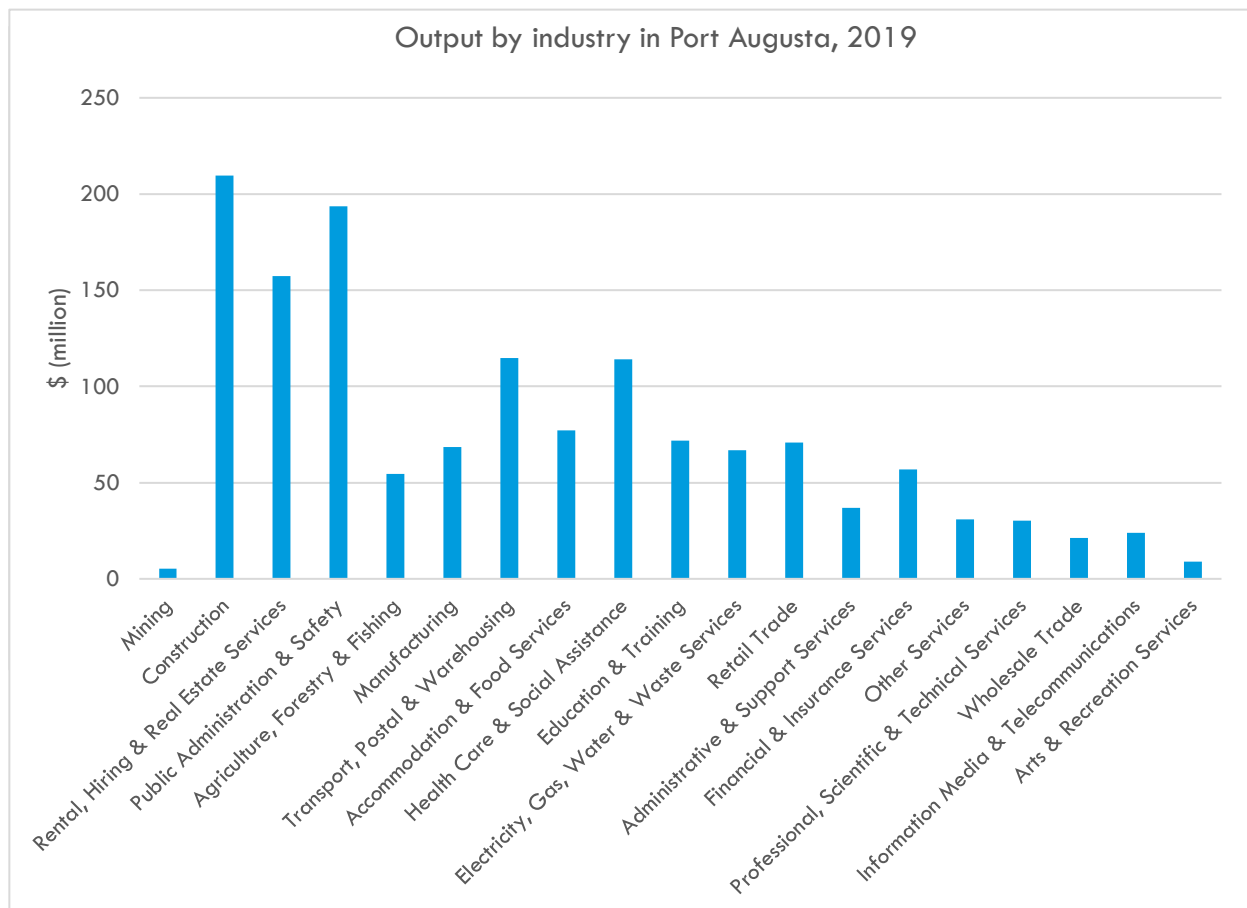
INDUSTRY

ECONOMIC OUTPUT

As seen in Figure 26, in 2019, Construction, Public Safety and Administration, and Rental, Hiring and Real Estate Services were responsible for 40% of the LGA’s economic output. This links the local economy’s health strongly to the presence of government services in the region, as well as the local infrastructure pipeline and its associated workforce. The *Port Augusta City Council Strategic Directions 2019-2029* has noted Port Augusta’s long-standing role as a services hub for the region, as well as its links to the Defence industry via the Cultana Training Area, that would be driving this output. The *Port Augusta Economic Growth and Investment Strategy* also notes Port Augusta’s traditional industry strengths: heavy industry, energy production, mining, and transport and logistics, which are also in line output values.

While the Strategy highlights that the LGA is optimistic about future projects in the Defence, renewable energy, and mining industries, it also notes that there is a strong culture in Port Augusta of waiting for the ‘Next Big Thing’. This suggests that there needs to be further work in developing sustainable growth options in the region. For example, the Strategy highlights that Port Augusta’s growing role a services hub, is also creating a reliance on government employment that are present as a result of major industries. As such the Strategy promotes seeking viable alternatives in the form of private sector interests.

Figure 26 Output by industry - Port Augusta, 2019

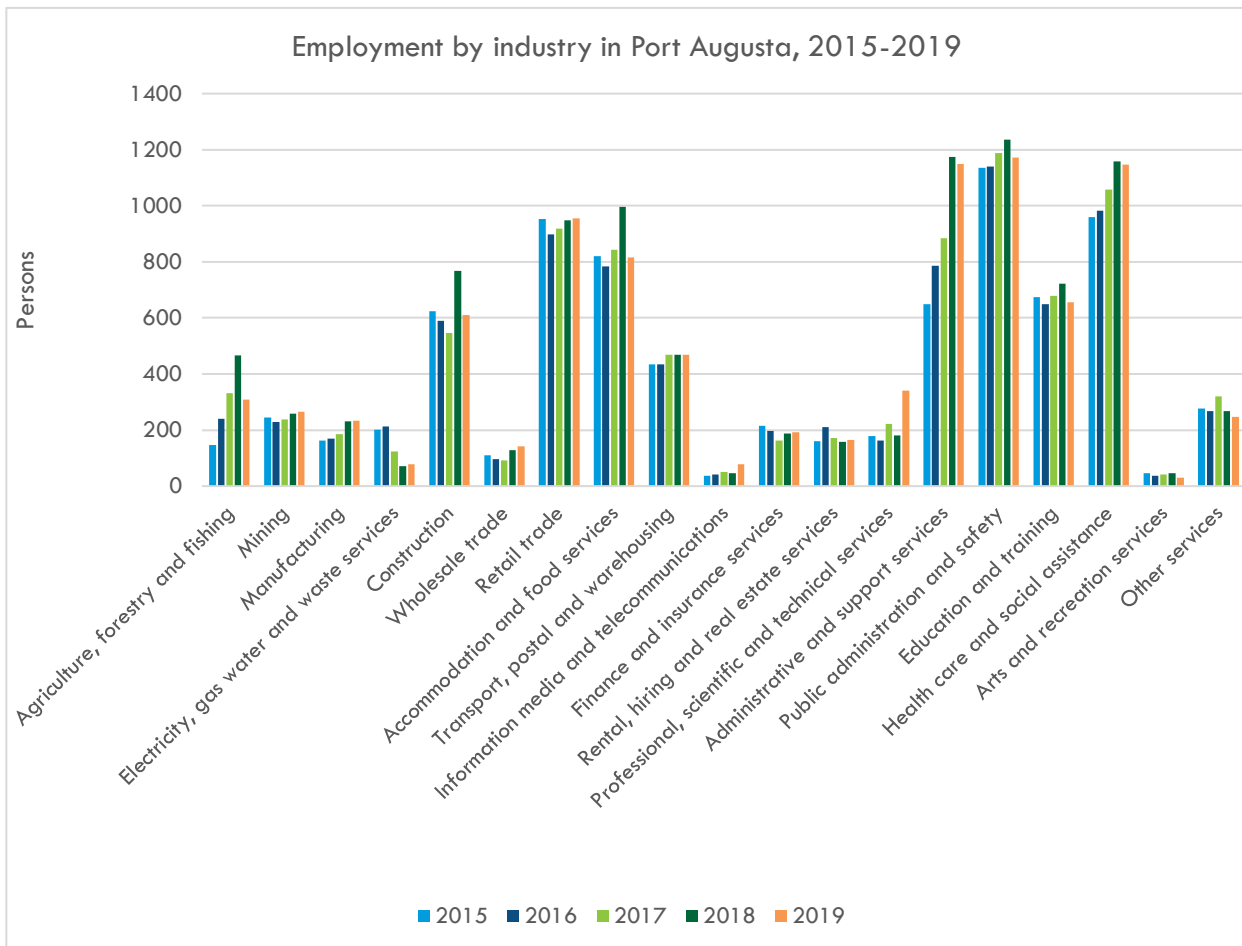


INDUSTRY OF EMPLOYMENT

The top three industries of employment in the Port Augusta LGA were Public Administration and Safety, Administrative and Support Services, and Health Care and Social Services, followed closely by Retail Trade and Accommodation and Food Services (see Figure 27). This indicates the importance of federal, state, and local government services to employment in Port Augusta, as well as tourism and other

industries that attract people to the LGA, such as construction. The majority of industries experienced a downturn in employment in 2016, some further in 2017. This may have been due to the closing of the coal-fired power station, which led to job losses of approximately 450 people, and a general lack of confidence by businesses in the LGA. However, employment in many industries appears to have rebounded in 2018, likely driven by new infrastructure projects such as the Bungala Solar Farm.

Figure 27 Employment by industry - Port Augusta, 2015 to 2019



BUSINESSES

From 2019 to 2021 the number of businesses registered in the Port Augusta LGA has remained relatively stable, growing from 588 to 595 (see Figure 29). Over this time the Construction industry has accounted for the largest number of businesses (103), followed by Rental, hiring and Real Estate Services (68), and Agriculture, Forestry and Fishing (62), which aligns with the top industries of the LGA's output. This is in step with the significant construction activity in the region (see Figure 28).

It should also be noted that, in the *Transforming the Upper Spencer Gulf* paper, Port Augusta, as well as Port Pirie and Whyalla, were noted to have only an average or low capacity in fast growing industries such as health, education, profession, scientific and technical, and telecommunications industries. This would limit economic performance over the next five years.

The *Port Augusta Economic Growth and Investment Strategy* also highlights that businesses networks are considered poor and lacking in maturity in the region and require development to take advantage of opportunities. Aside from links and networks, businesses also often don't have the necessary skills and capabilities to maximise the benefits of industry activity. As such there needs to be a focus in the LGA on accelerating growth in areas where business in Port Augusta have a competitive advantage, while engaging with external and different sources of investment.

Figure 29 Registered businesses - Port Augusta, 2019 - 2021

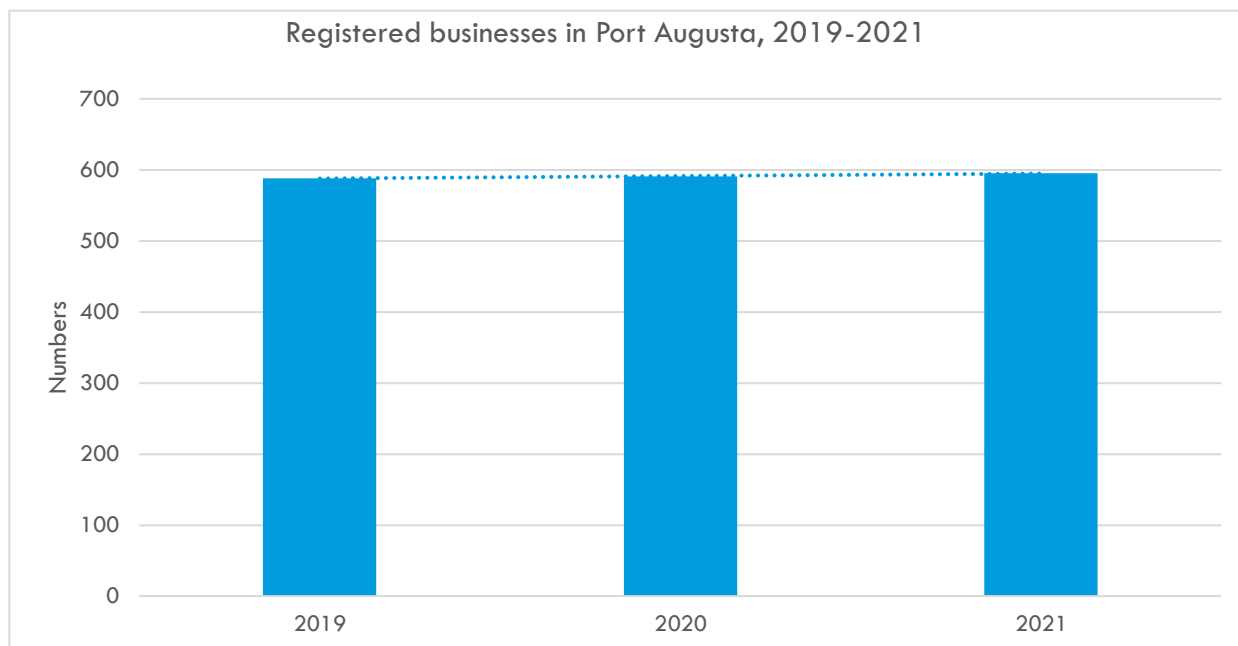
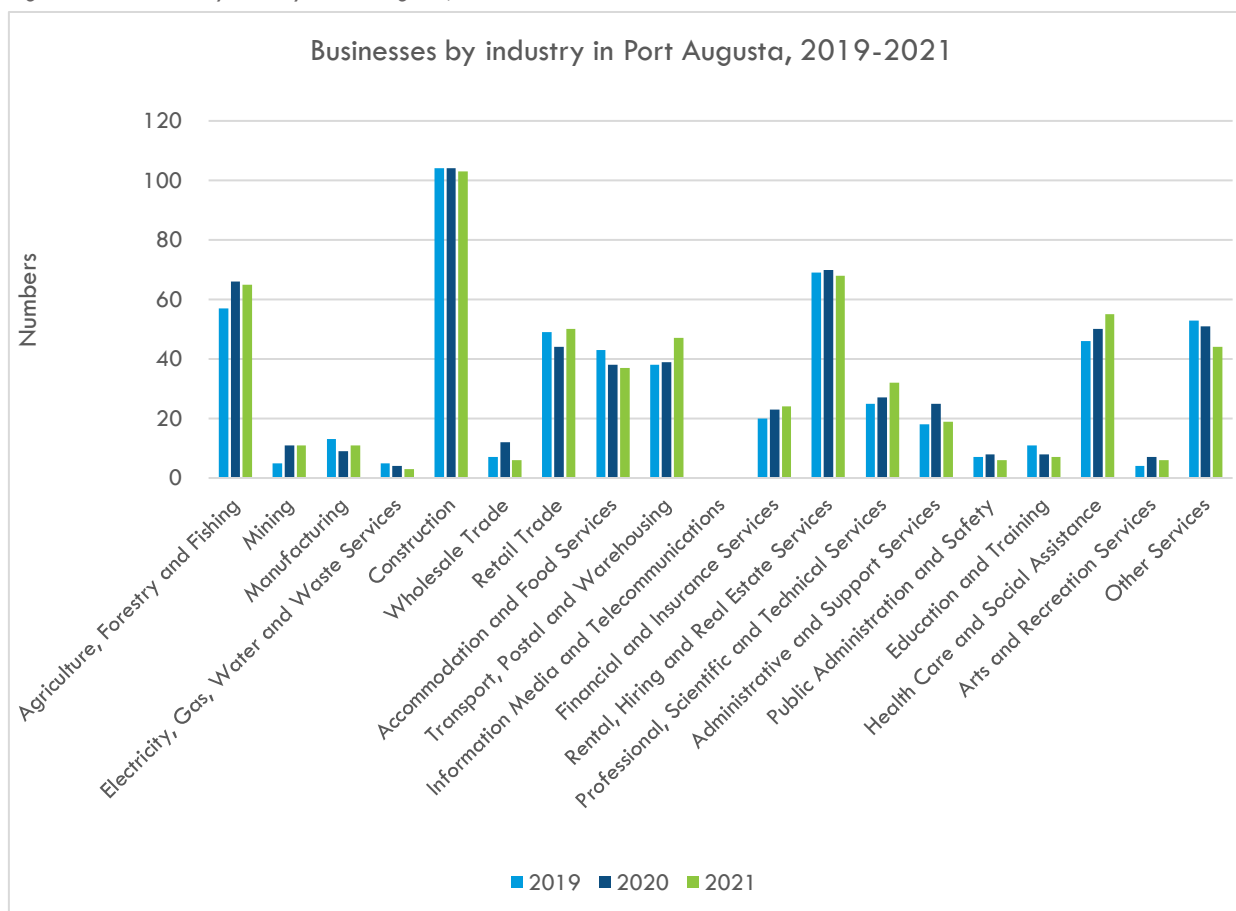


Figure 28 Businesses by industry - Port Augusta, 2019 to 2021



HOUSING, EDUCATION AND HEALTH

RENTAL AND SALES MARKETS

Figure 30 Rental market (12 months) - Port Augusta, 2013 to 2022

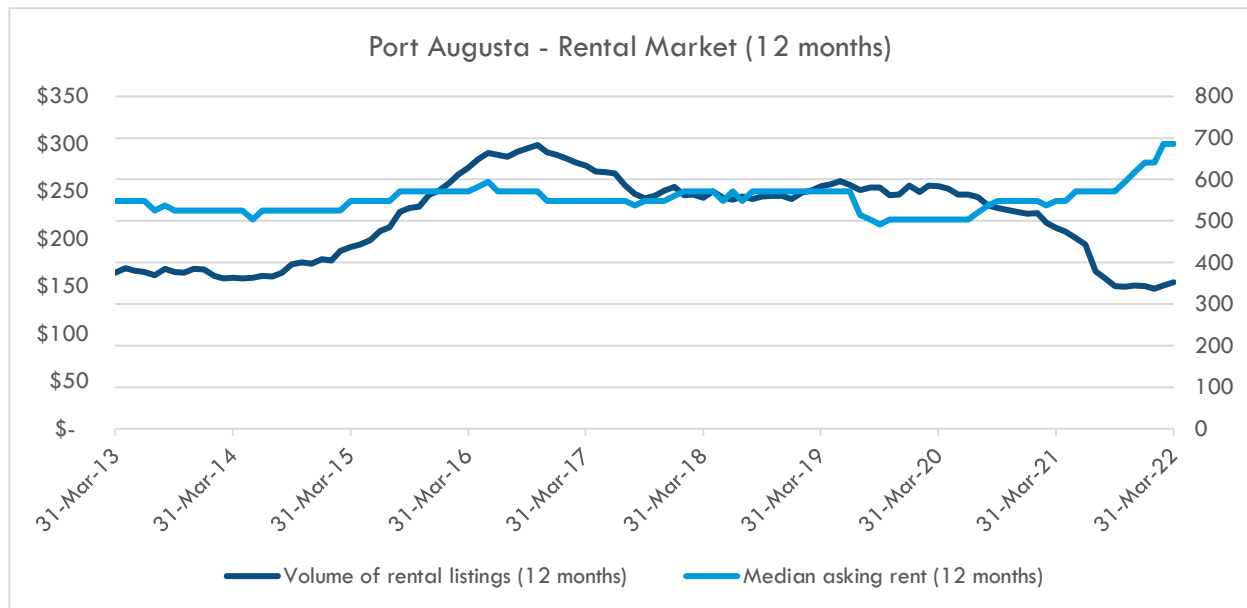
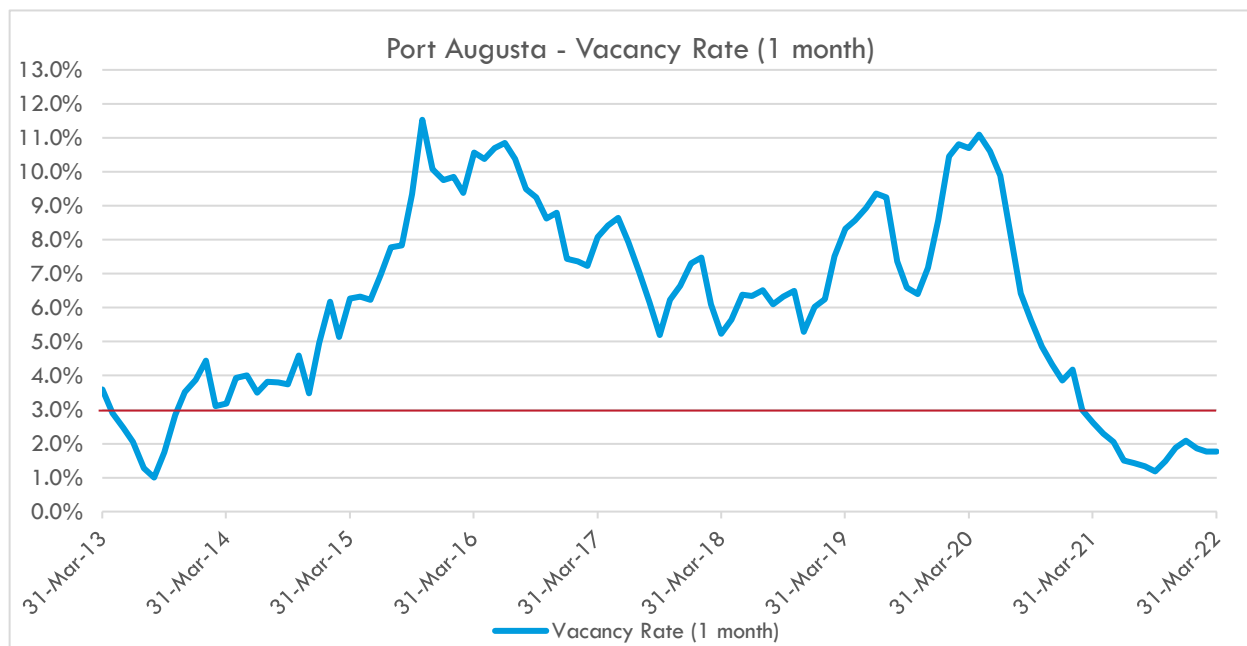


Figure 31 Vacancy rate (1 month) - Port Augusta, 2013 to 2022



As shown in Figure 30, over the last 10 years the volume of rental listings in Port Augusta grew to a high of 683 listings in late 2016, before returning to a range of 550 to 600 until the onset of the COVID-19 pandemic. Since the onset of the pandemic, rental listings have declined substantially to approximately 350 in 2022, lows not experienced since 2013. This tight supply of rental properties is reflected in the LGA’s vacancy rate which just prior to the pandemic was as high as 11.1%, with a previous high of 11.5% in 2015 (see Figure 31). It now sits at 1.8%, having recovered from a low of 1.2%, but still well below the 3% needed to ensure some availability in the market. In conjunction with this, median asking rents have skyrocketed to \$300, where they had previously held steady between approximately \$215 and \$260 per week. However, despite similar numbers of rental listings as in early 2013, median asking prices are approximately \$60 higher.

The volume of sales in the market had been holding steady at between 100 and 150 dwellings since 2015, however since mid-2021 the number of properties put on the market has grown substantially and is currently at over 314 (see Figure 32). Median sales prices however have been less volatile, with prices during the COVID-19 pandemic only just now climbing back to LGA highs seen in early 2013 and late 2015/ early 2016.

Similarly, the 75th percentile sales price was at its highest in 2019, before experiencing a substantial drop just prior to the pandemic. This price has experienced staggered growth since and appears to be currently declining, indicating a decreased price for the top end of the dwelling market (see Figure 33).

Figure 32 Sales market (12 months) - Port Augusta, 2013 to 2022

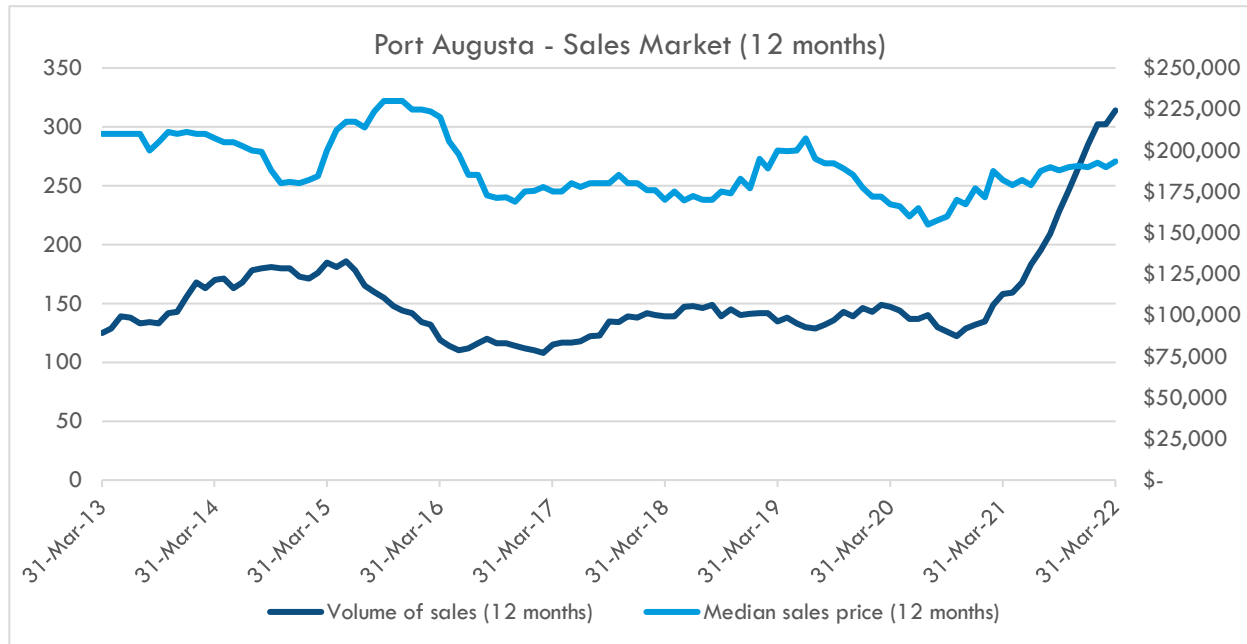
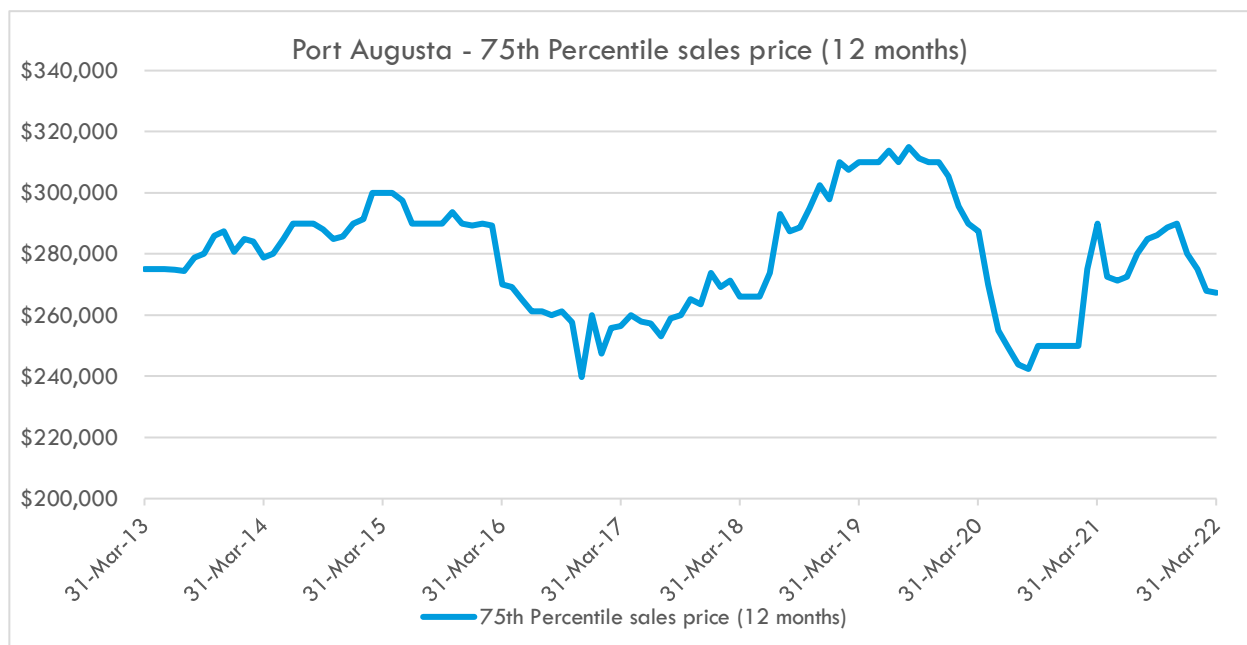


Figure 33 75th percentile sales price (12 months) - Port Augusta, 2013 to 2022



Findings in the **Spencer Gulf Cities Housing Report** indicate that demand for housing in Port Augusta is being driven by transient population groups involved in major construction projects, such as for renewable energy projects, for short periods of time. Noting the irregular demand for housing because of the shorter term nature of the construction projects, the sales market experiences greater

fluctuations than the rental market. Further, it was reported that the finance requirements in Port Augusta are higher than in many other markets, with banks requiring a 40% deposit in response to the risk from market fluctuations.

This report noted the Government Employee Housing (GEH) Program in Port Augusta, which provides accommodation for eligible government employees, is currently at full capacity. This in conjunction with the low number of quality rental properties available (and the low vacancy rate) has made it difficult to meet demand. This has resulted in some families having to utilise short term accommodation in the interim.

The report also noted the Port Augusta City Council's observations that State Government housing was not in good condition and required refurbishment – the impacts of which are declining property values in some areas, and reduced capacity in this housing. This is particularly important, as some groups are unable to access the private market with rising costs and competition.

BUILDING APPROVALS

Data from CoreLogic indicates that the value of residential building in Port Augusta is low, at \$434 per capita¹⁶. The highest value of residential building work per capita is in Robe at \$12,503 and the lowest Peterborough at \$7 per capita. The *Spencer Gulf Cities Housing Report* notes that Port Augusta has the lowest total value of building approvals of the three Spencer Gulf cities (Port Pirie, Whyalla, and Port Augusta): \$2,930,000 from 2017/18 to 2020/21. However, it did note that the LGA has large quantities of appropriately zoned residential land that could support a sufficient housing pipeline (inclusive of a range of housing types). This includes approximately 1,100 allotments that are currently under the ownership of the Minister of Transport that could be considered to be land that might be able to be used for residential housing. There is also the opportunity to consider subdivision of larger blocks. However, this report also noted that builders are indicating a significant wait for new residential buildings of between 12 – 24 months, which will slow the pipeline of new housing into the market.

EDUCATION AND HEALTH SERVICES

Port Augusta has 11 primary and secondary schools, of which nine are public and two are private. The two private schools are Caritas College, a catholic co-educational school providing for years R to 12, and Seaview Christian College, which provides co-education for years R to 11, with year 12 being added in 2023. Port Augusta also has a school specialising in education for R to 12 students with disabilities and complex learning needs, the Port Augusta Special School¹⁷.

The major health facility in Port Augusta is the Port Augusta Hospital and Health Services facility, with services that include¹⁸:

- Accident and emergencies
- Medical and surgical
- Palliative care
- Rehabilitation
- Renal dialysis
- Chemotherapy services
- Obstetrics and maternity
- Aboriginal health.

Primary health care in Port Augusta is delivered through the five General Practices¹⁹ (all of which bulk bill) and a range allied and community health providers including dentists, orthodontists, chiropractors, physiotherapists, optometrists, and five pharmacies.

Aboriginal health is also supported by the Pika Wiya Health Service, an Aboriginal Community

¹⁶ This is based on June 2021 approval and 2020 estimated residential population figures

¹⁷ Australian Curriculum, Assessment and Reporting Authority. (2022) My School. <https://www.myschool.edu.au/>

¹⁸ SA Health (2022). Port Augusta Hospital and Health Service.

<https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/services/hospitals/regional+hospitals+and+health+services/funln+hospitals+and+health+services/port+augusta+hospital+and+regional+health+service/port+august+a+hospital+and+regional+health+service>

¹⁹ Health Direct. (2022) General Practice Port Augusta https://www.healthdirect.gov.au/australian-health-services/results/port-augusta-5700/tihcs-ah-11222/gp-general-practice?pageIndex=1&tab=SITE_VISIT

Controlled Health Services for Aboriginal and Torres Strait Islander and non-Indigenous and Indigenous communities. The organisation provides GP, oral, primary and health services from Port Augusta and in clinics in Davenport, Copley and Nepabunna.²⁰

The *Transforming the Upper Spencer Gulf* paper noted Port Augusta's role as a health and education service centre (in conjunction with Port Pirie and Whyalla). This is further emphasised by the Port Augusta City Council's *Strategic Directions 2019 – 2029* report which highlights Port Augusta's role as an education and health hub, including for School of the Air and the Royal Flying Doctor's Service. The *Port Augusta Economic Growth and Investment Strategy* further highlights this with the concept of a health services precinct and the potential for growth in private sector health services. However, it also notes the role of the health and aged care industry in the local job market, and as such the need to ensure that health, aged care, disability support and education training is resourced locally.

²⁰ Pika Wiya Health Service. (n.d.). About Pika Wiya Health Service. <https://www.pikawiyahhealth.org.au/about-pika-wiya/>

WHYALLA

SUMMARY

- The Whyalla LGA’s population has been declining since 2015 and with it the working-age population. Growth in population in this LGA can be attributed to natural increases and overseas migration, however this growth has been outmatched by the loss of residents to other parts of Australia.
- Further while the RAI’s *Regional Movers Index* has indicated a trend towards greater migration from urban areas to the regions generally, Whyalla has seen a decline in this type of migration over the last 12 months.
- Conversely, the Indigenous population in Whyalla has shown some growth over the last three Census periods, and in particular the working-age population has been growing.
- The Whyalla LGA has consistently had a higher unemployment rate than South Australia as such, whilst the working-age population is declining and migration is limited, this means there may be some untapped capacity in the local labour force to fill vacancies arising from the region’s projects pipeline. This pipeline includes six energy projects valued at over \$13 billion.
- With this in mind, the LGA needs further training and job-readiness support to ensure this latent workforce can be activated and trained to meet specific workforce needs. The Whyalla City Council are currently working on a range of initiatives to leverage its current offerings, including the University of South Australia campus.
- Currently the LGA has a range of education opportunities for primary and secondary school, including two private schools and the development of the new Whyalla Secondary College, which combined three schools.
- Growth in the skills and capacity of both employees and businesses will be a significant factor in the LGA’s ability to take advantage of industry opportunities. The Whyalla City Council is particularly focused on supporting local businesses to be suppliers of choice for the growing Defence industry in the region.
- While the LGA’s population has declined, demand for housing has grown, with the number of rental listings declining substantially and availability among those listings at an all-time low of 1.2%, well below the minimum 3% needed in a market. This is impacting on local recruitment endeavours, whilst also increasing the strain on other housing and accommodation types.
- The decline in rental listings is mirrored by the increase in sales listings, however the median sales price has not increased at the same rate as the sale of properties, this being due to market sensitivity.
- The overall trends in the Whyalla market appear to be in line with both the uncertainty around the Whyalla Steelworks, the impacts of the COVID-19 pandemic, and the significant demand generated by infrastructure projects.
- There is the opportunity for further housing development, with the availability of appropriately zoned land in Whyalla. However, development is hindered by a lack of local developers and construction companies, which is causing significant wait times for new building.
- Health services in Whyalla include primary and tertiary services, as well as a range of allied health services. This includes bulk billing GP practices.

PIPELINE

The pipeline of projects for the Whyalla LGA is extensive. The following are some of the large Infrastructure, Manufacturing, Mining and Renewable Projects in the Whyalla region. Of the 18 projects, six are energy projects, valued at a total \$13.7 billion.

Table 5 Infrastructure pipeline - Whyalla

Project	Timeline	Sector	Value	Jobs	Source
1. Cultana Solar Farm and Playford Big Battery	2020 Construct ion	Energy	\$660m	700 construction, 10 ongoing	Australia New Zealand Infrastructure

Project	Timeline	Sector	Value	Jobs	Source
	Commencement 2022 Expected Cultana Solar Farm Completion 2023 Expected Playford Big Battery Completion				Pipeline and Spencer Gulf Cities Housing Report
2. Adani Solar Farm		Energy	\$195m	150 construction, 5 ongoing	Spencer Gulf Cities Housing Report
3. EP High Voltage Transmission Link		Energy	\$300m	300 construction	Spencer Gulf Cities Housing Report
4. Cultana Training Area		Defence	\$85m		Spencer Gulf Cities Housing Report
5. Eyre Peninsula Gateway Hydrogen Project		Energy	\$240m		Spencer Gulf Cities Housing Report
6. Port Bonython Hydrogen Energy Cluster		Energy	\$13b		Spencer Gulf Cities Housing Report Whyalla Economic Development Strategy 2022-2030
7. Port Bonython Jetty Upgrade		Transport	\$37m		Spencer Gulf Cities Housing Report
8. Yellow Tail King Fish Farm		Agriculture	\$10m	70 ongoing	Spencer Gulf Cities Housing Report
9. Cuttlefish Sanctuary Tourism Trail		Tourism	\$4m	2 ongoing	Spencer Gulf Cities Housing Report
10. Rolling Mill		Manufacturing	\$585m	1,000 construction, 200	Spencer Gulf Cities Housing Report

Project	Timeline	Sector	Value	Jobs	Source
				ongoing	
11. Steel Processing and Galvanising Facility		Manufacturing	\$17m	80 construction, 150 ongoing	Spencer Gulf Cities Housing Report
12. International Hotel Development		Tourism	\$100m	500-700 construction, 300 ongoing	Spencer Gulf Cities Housing Report
13. Whyalla Foreshore Revitalisation			\$200m		Spencer Gulf Cities Housing Report
14. Whyalla Airport Upgrade		Transport	\$12m	30 construction, 4 ongoing	Spencer Gulf Cities Housing Report
15. Whyalla Childcare Centre		Education	\$3m	50 construction, 29 ongoing	Spencer Gulf Cities Housing Report
16. Yoorndoo Ilga Solar		Energy		295 construction, 5 ongoing	Spencer Gulf Cities Housing Report
17. Australian Radioactive Waste Agency		Government	\$200m	45 construction, 25 ongoing	Spencer Gulf Cities Housing Report
18. Renascor Resources' Siviour Project – Purified Spherical graphite/Battery anode Material Production Plant		Manufacturing		150 construction, 50 ongoing	Spencer Gulf Cities Housing Report

POPULATION

The *Whyalla Economic Development Strategy 2022-2030* noted the population of Whyalla as 21,828. The population of the Whyalla LGA has been declining since 2015, most severely in 2017 (see Figure 34). This can most likely be attributed to the fate of the Whyalla Steelworks, which was placed into administration and then subsequently sold in 2017. Whilst population decline eased after this, it appears the COVID-19 pandemic may have furthered the decline again. This is due to the decline in net overseas migration to Whyalla in 2020/21. Increases in Whyalla's population growth has relied on both overseas migration and natural increases (births minus deaths), with overseas migration marginally increasing over the last five years and natural increases declining (see Figure 35). However, gains from these sources have not outweighed the loss of population through interstate migration. In contrast, there has been modest but consistent growth in the Indigenous population in Whyalla from 2011 to 2021, growing from 4.2% of the population to 5.5% (see Figure 36).

Figure 34 Annual change in estimate in resident population - Whyalla, 2007 to 2021

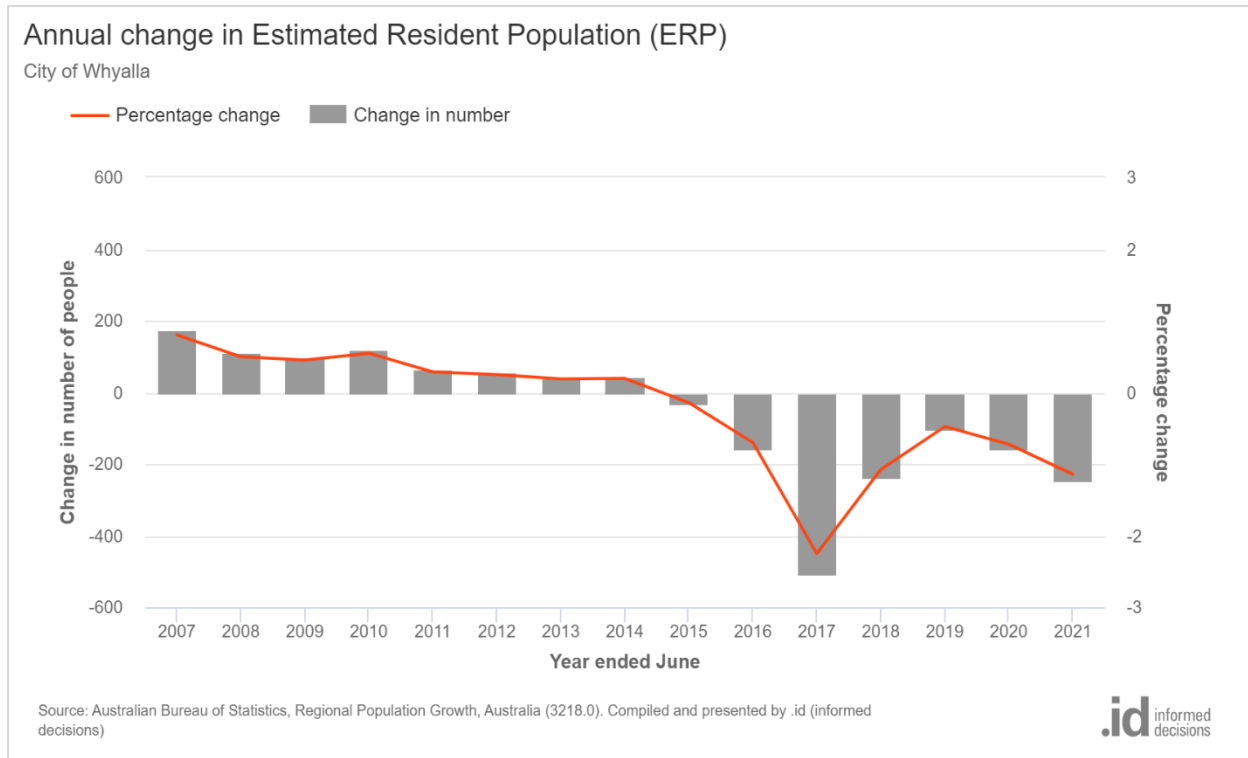


Figure 35 Components of population change - Whyalla, 2017 to 2021

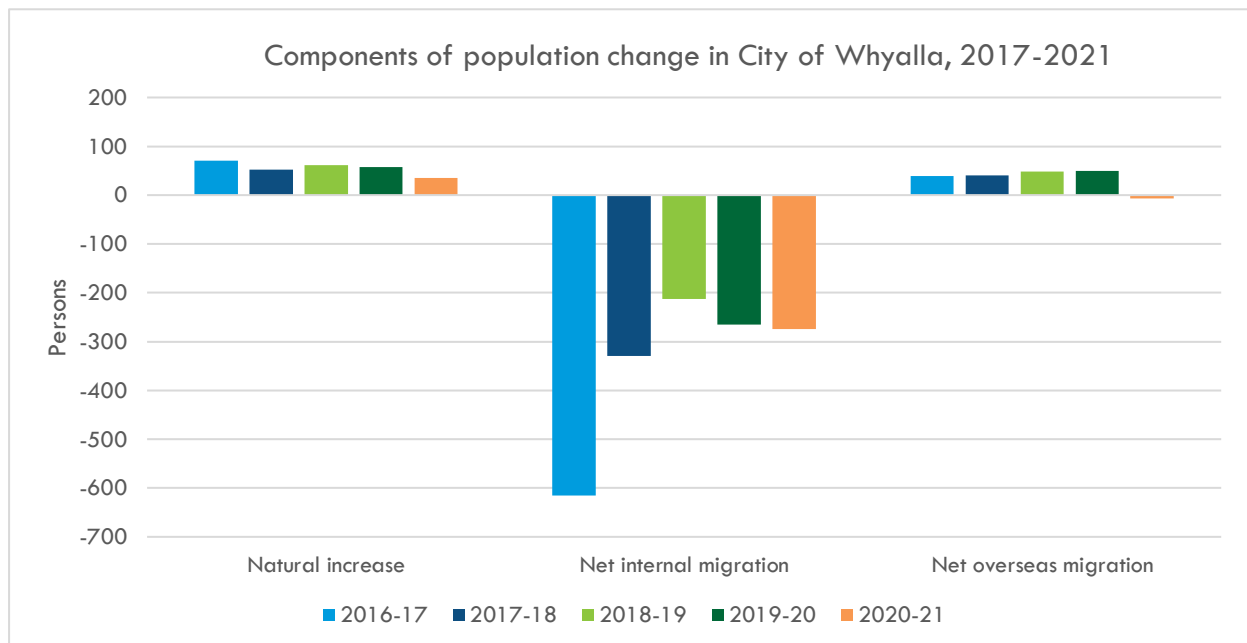
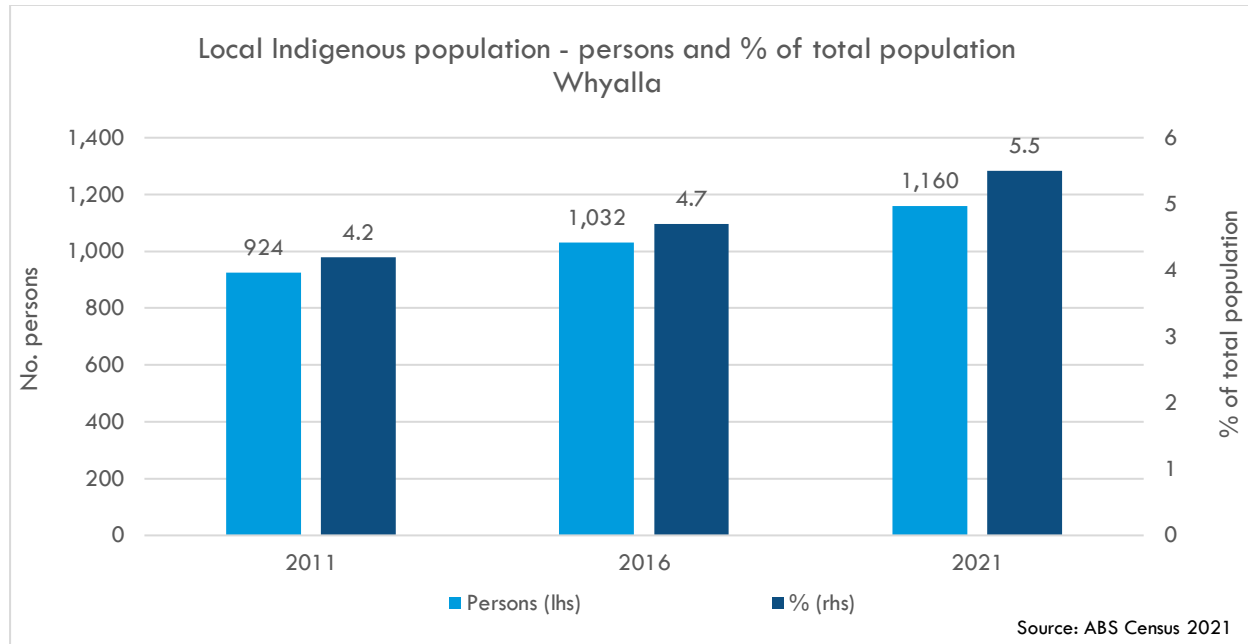


Figure 36 Indigenous population - Whyalla, 2011 to 2021



However, there is a new nation-wide post-pandemic social phenomenon that more Australians are moving from cities to regional areas. Compared to the pre-pandemic stage (before March 2020) there has been an overall 12% increase in people moving from cities to regions across Australia (see Figure 37). Having said this Whyalla has experienced a 4% decrease in people moving from urban areas to the LGA from 2020 to 2021, indicating that it will need to work harder than other LGAs in the region to attract new people to the region (see Figure 38).

Figure 37 Regional Movers Index: population flows from capital cities to Regional Australia, 2018 to 2022

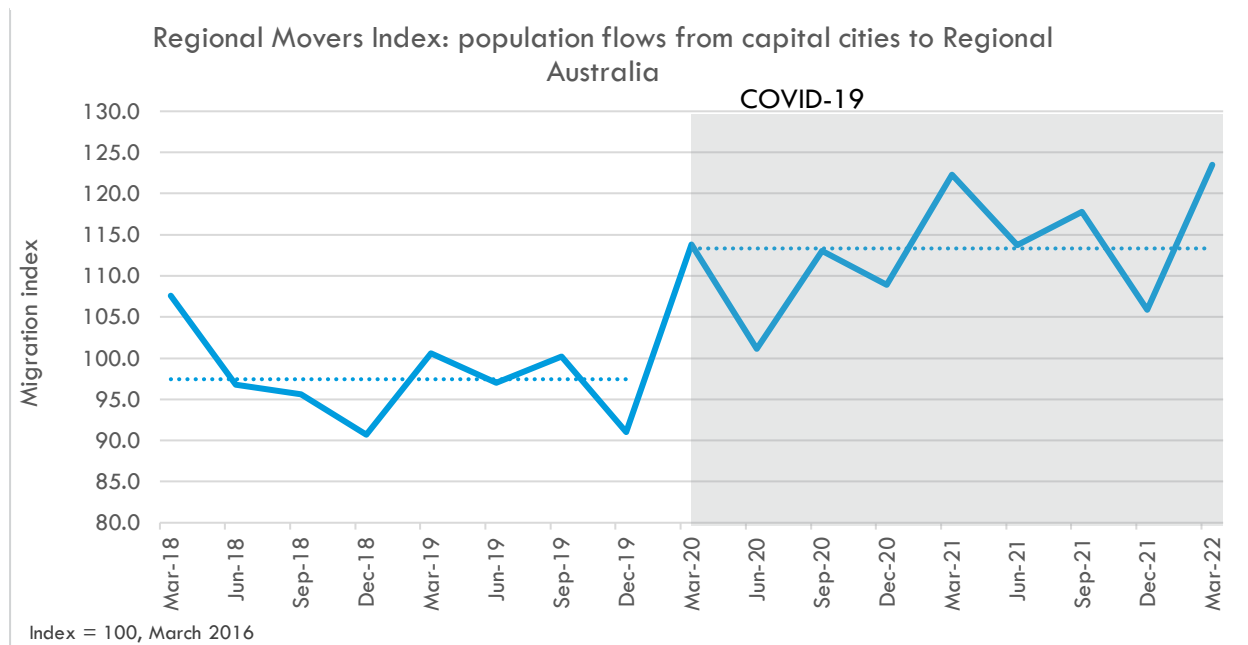
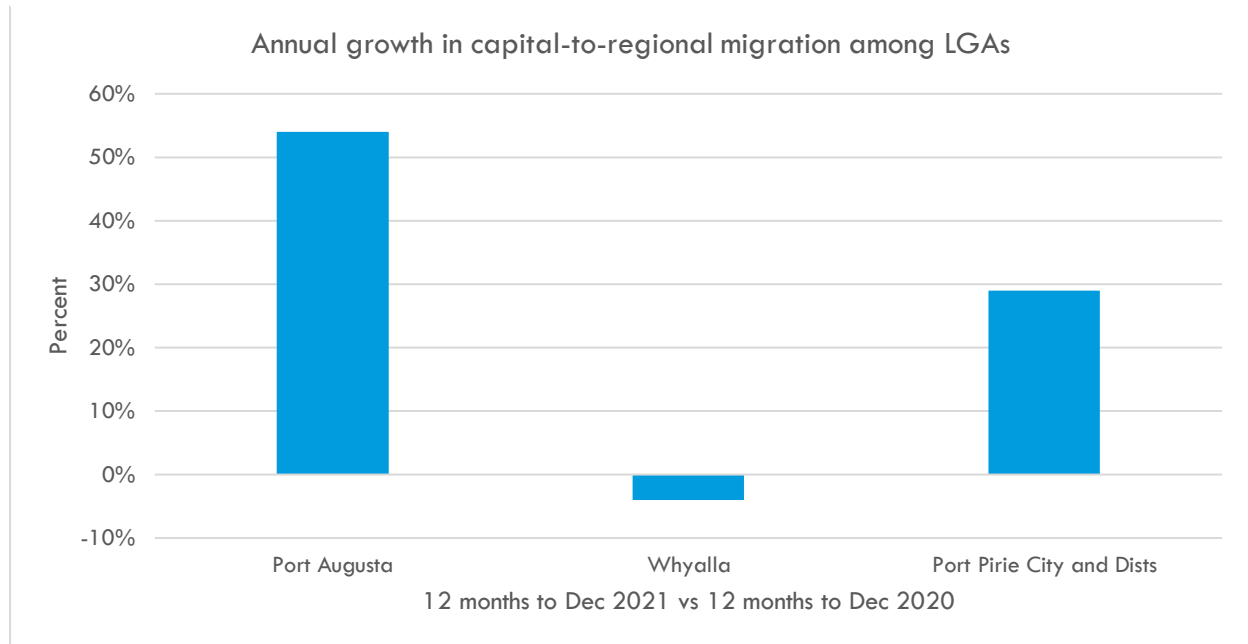


Figure 38 Regional Movers Index: Annual growth in capital-to-regional migration among LGAs, 2021 to 2022



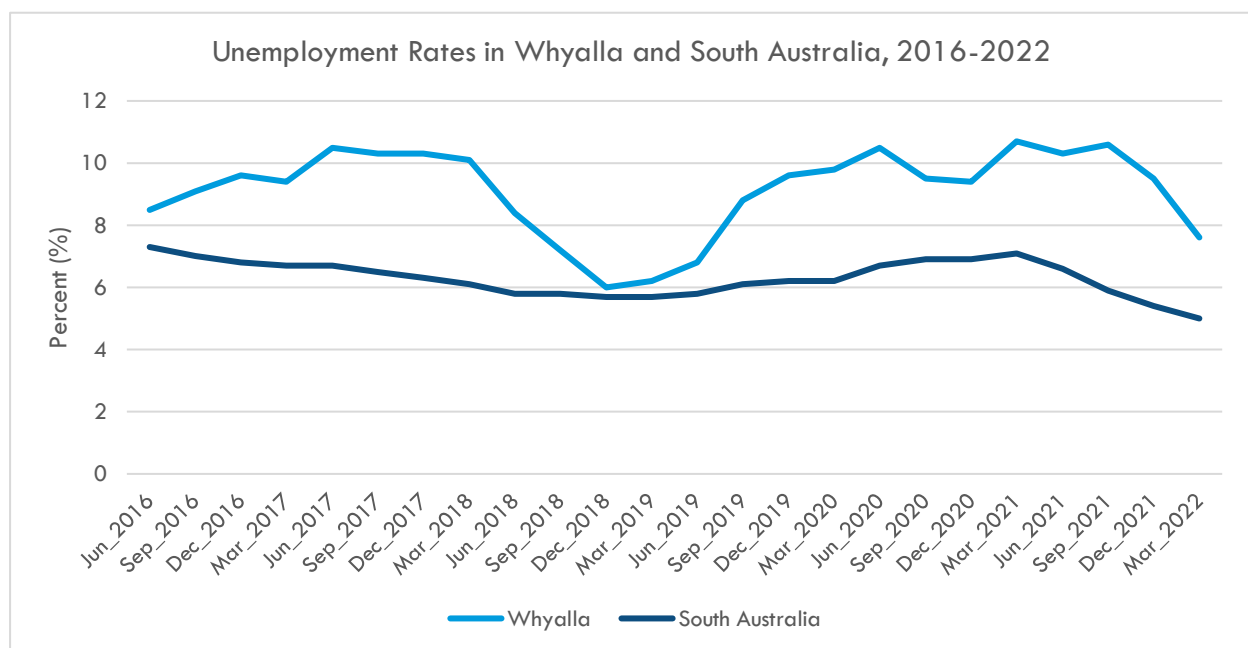
WORKFORCE

UNEMPLOYMENT

The unemployment rate in the Whyalla LGA has, despite fluctuations over the last five years, remained above the state’s rate, peaking at 10.7% in March 2021. The rate of unemployment in Whyalla has been more turbulent than that of South Australia’s and declined rapidly at the end of 2018 before climbing back up to above 8% in late 2019 (see Figure 39). This rate of unemployment indicates that there is some untapped supply in the Whyalla labour force.

Whyalla is a part of the North West Country Employment Region – the *North West Country Local Jobs Plan* notes that this region has experienced persistently high unemployment due to a disadvantaged labour market. It notes that jobseekers in this region experience greater isolation, both from employers and services.

Figure 39 Unemployment rates - Whyalla and South Australia, 2016 to 2022



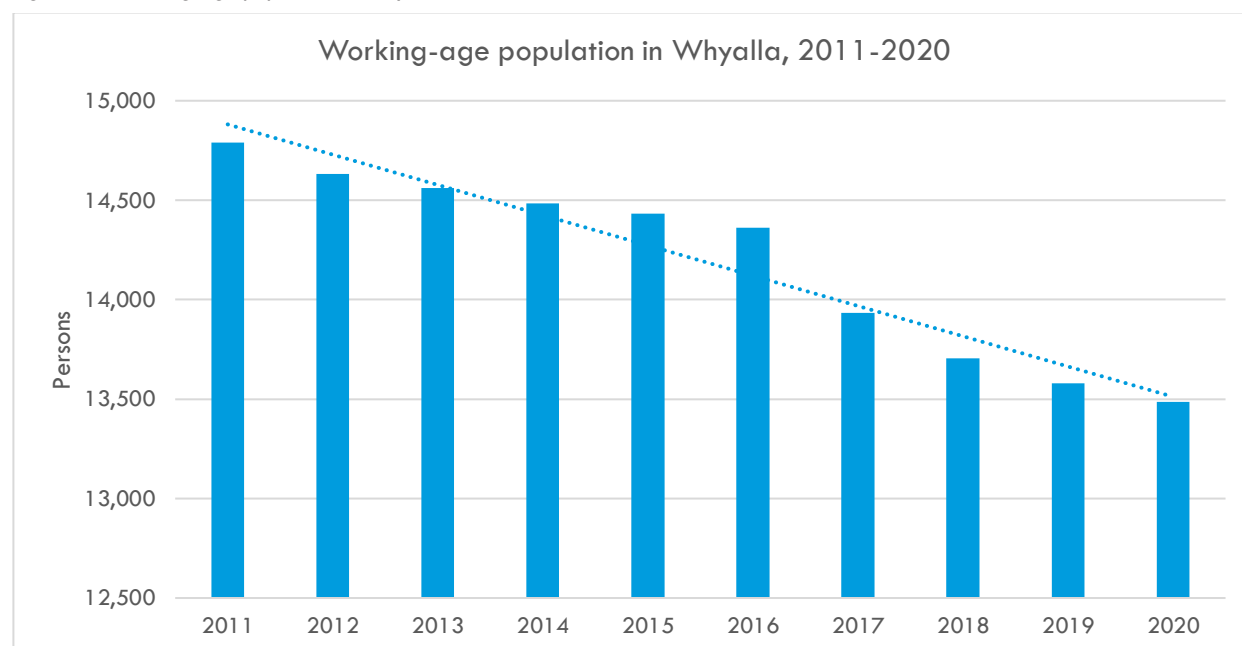
LABOUR FORCE

Along with the decrease in overall population, Whyalla’s working-age population has also been in decline over the last decade (Figure 40). This reflects the natural process of population ageing, as well as the moving-out of people. This will impact on the availability of workers in an LGA with an already significant pipeline of infrastructure work. In contrast, the working-age Indigenous population has been rising since 2011 – reaching some 750 people in 2021, or 65% of the local Indigenous population.

Noting this trend, it will be important to engage as much of the local workforce in employment as possible to meet the demand for workers that the LGA’s pipeline has and will continue to bring. The *Whyalla Economic Development Strategy 2022-2030* has noted that the education and training system will be important to prepare and build the local workforce. This has been previously noted in the *Transforming the Upper Spencer Gulf* paper which summarised that the region will need to build local skills and capability to service growth industries, including through re-training of unemployed groups. The paper recommended the development of the Upper Spencer Gulf ‘Community Owned Tertiary Education Centre’ (COTEC) to meet local skilling needs. Further, the *North West Country Local Jobs Plan* highlights that the region has previously struggled to attract appropriately skilled workers, and it is now also struggling to attract entry-level workers across a range of industries including retail, aged care, transport, and heavy industry. This is despite a higher unemployment rate in the Whyalla LGA, reiterating the isolation and disconnect of jobseekers from employers. This report further notes the need for employment, skills development and labour force engagement support to bring down the unemployment rate over the long-term and support economic industry opportunities in the region. However, it does identify the presence of multiple labour hire companies specifically in Whyalla.

Whyalla Economic Development Strategy 2022-2030 notes a range of initiatives that have been undertaken by the Whyalla City Council to support the education and training system, including advocating for a Regional Education Centre of Excellence to expand on the present TAFE, vocational education and training, and university offerings. In terms of vocational and tertiary education services, Whyalla hosts South Australia’s only university campus outside of Adelaide – the Whyalla campus of the University of South Australia²¹. It also hosts a training site for the Adelaide Rural Clinical School²². TAFE SA also has a Whyalla campus offering courses that have been developed in collaboration with local industry²³.

Figure 40 Working-age population - Whyalla, 2011 to 2020



²¹ City of Whyalla. (2022) Education Institutions. <https://www.whyalla.sa.gov.au/our-city/education-and-employment>

²² Ibid.

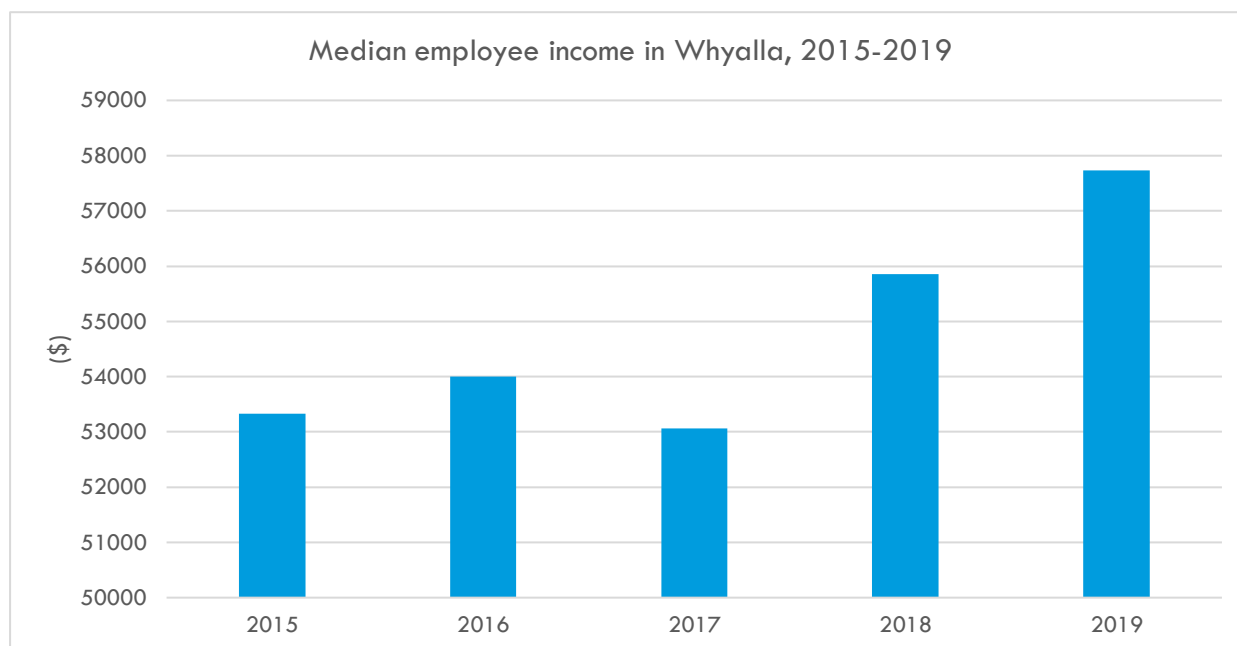
²³TAFE SA. (2022) TAFE SA in Whyalla. <https://www.tafesa.edu.au/locations/whyalla-eyre-peninsula/whyalla>

Noting the significant expansion planned for the Cultana Training Area the Whyalla City Council are also seeking to work with local education and training organisations, to prepare them to build a pipeline of local skilled workers for the Defence industry.

The **North West Country Local Jobs Plan** also notes presence of the Local Jobs Program which delivers connections skills, training programs and other supports services for jobseekers, as well as the presence of government programs to support businesses and employers to invest in developing and training staff.

QUALITY OF WORK

Figure 41 Median employee income - Whyalla, 2015 to 2019



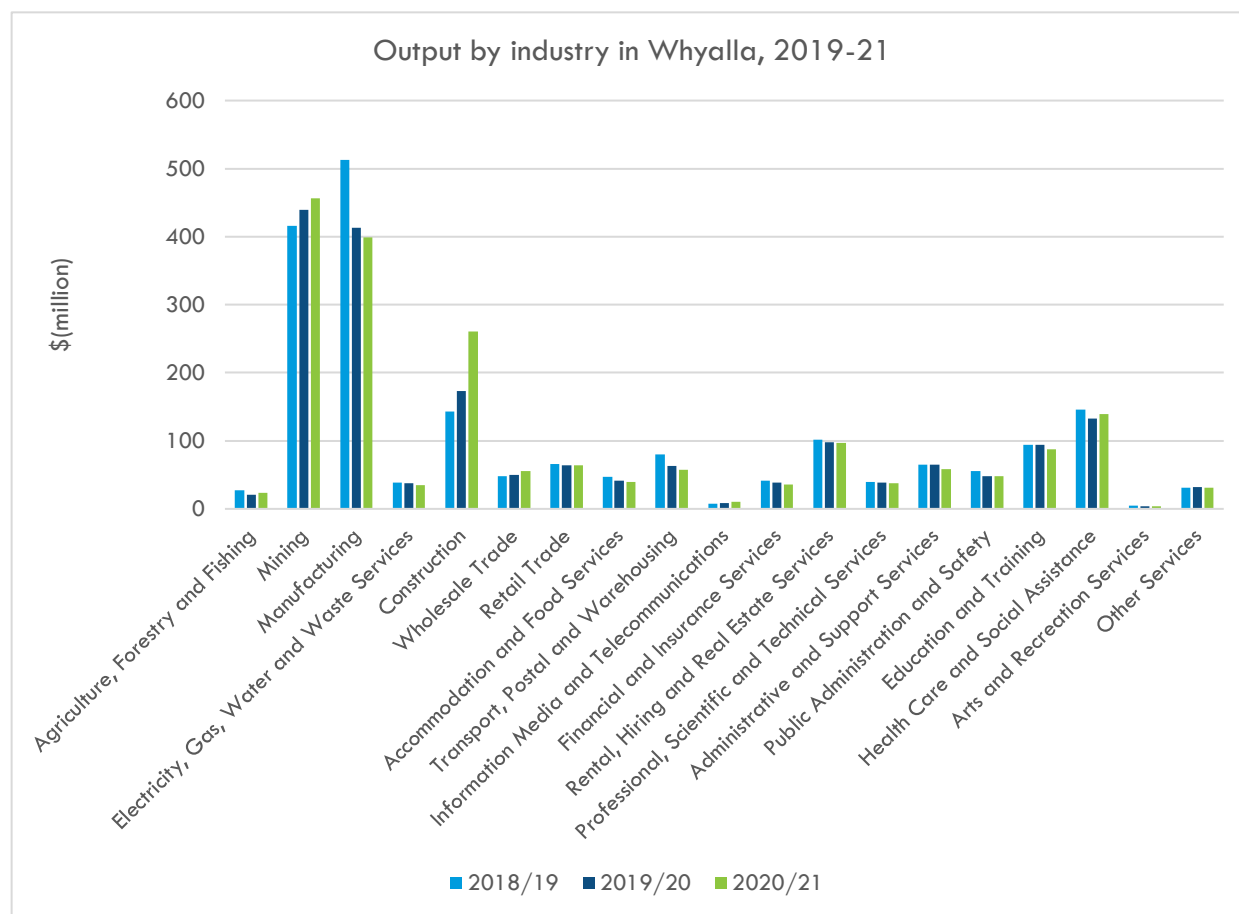
The median income of employees has generally increased from \$53,334 in 2015 to \$57,738 in 2019, indicating a trend towards a better quality of work in the LGA (see Figure 41). This is higher than the median income for the state of South Australia and is in line with the declining unemployment rate in the LGA throughout this period. In conjunction with this, the proportion of full-time employment in both 2011 and 2016 has been greater than part-time employment (64% full-time to 36% part-time), and more full-time employment tends to indicate better stability for employees. However, over this period the proportion of full-time employees declined to 61% whilst the proportion of part-time increased to 39%. Again, the growth in median income appears to have stood up to this trend.

INDUSTRY

ECONOMIC OUTPUT

As shown in Figure 42, from 2018/19 to 2020/21 the largest industry in Whyalla by output has changed from Manufacturing to Mining. The Manufacturing industry experienced a 29% decline in output from 2018/19 to 2020/21. In comparison the Mining, Wholesale Trade, Information, Media and Communications, and Construction industries increased by 9%, 13%, 31% and 43% respectively. In particular, the Construction industry has grown by \$117.5million, in line with the extensive construction activities in the LGA, including the new high school. Every other industry in this LGA declined in the value of output over this period, linking economic growth strongly to these significant construction works currently underway and to be undertaken in the LGA.

Figure 42 Output by industry - Whyalla, 2019 to 2021

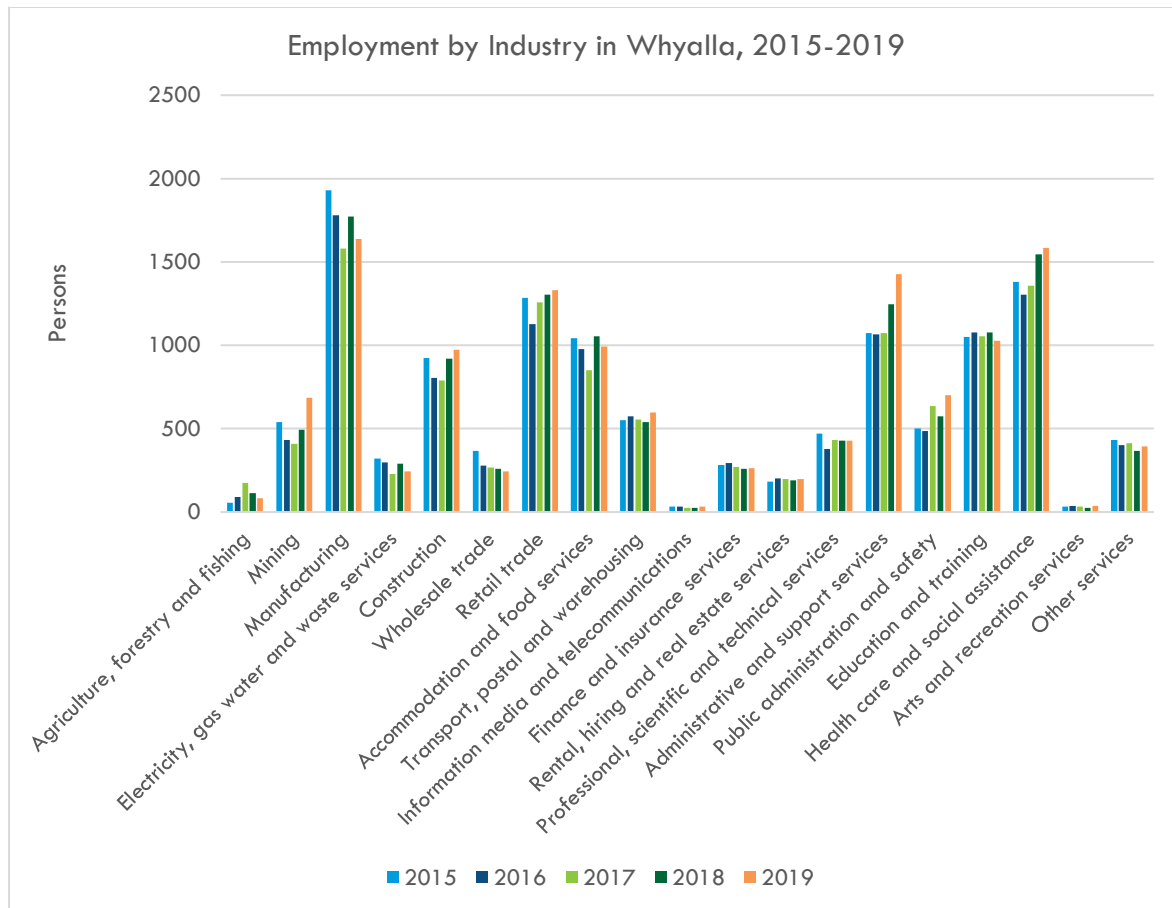


INDUSTRY OF EMPLOYMENT

In terms of industry of employment, Manufacturing has remained the highest employing industry from 2015 to 2019, however has experienced a total 18% decline. This can be attributed to the Whyalla Steelworks closure. The next three largest employing industries are Health Care and Social Assistance, Administrative and Support Services, and Retail – all of which account for at least 1,300 employees each. Whilst proportionally the Agriculture, Forestry and Fishing industry has grown by the most at 30% (25 jobs), the Administrative and Support Services has grown by 351 jobs (25%) and Public Administration and Support Services by 199 (28%) indicating a growing government presence in the LGA (see Figure 43).

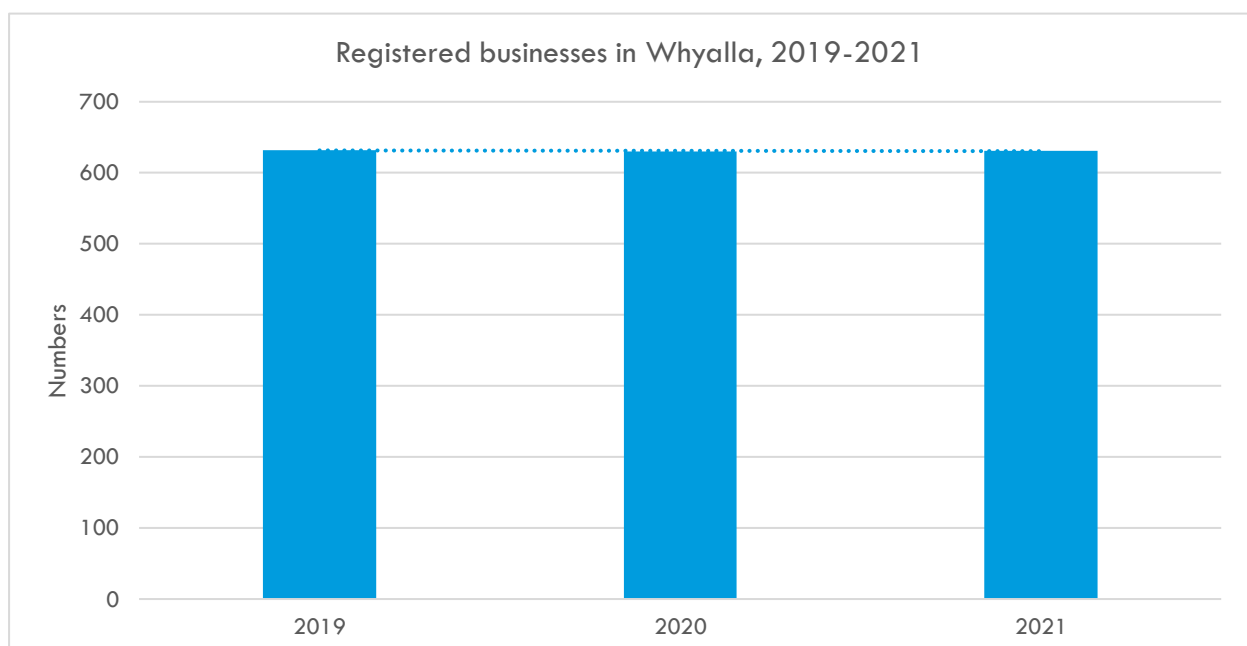
Outside of these core industries, the Whyalla City Council in its [Whyalla Economic Development Strategy 2022-2030](#), has highlighted its desire to leverage regional tourism opportunities and develop Whyalla as a tourist destination. This includes plans for \$100m five-star hotel, that will employ 400 people.

Figure 43 Employment by industry - Whyalla, 2015 to 2019



BUSINESSES

Figure 44 Registered businesses - Whyalla, 2019 to 2021



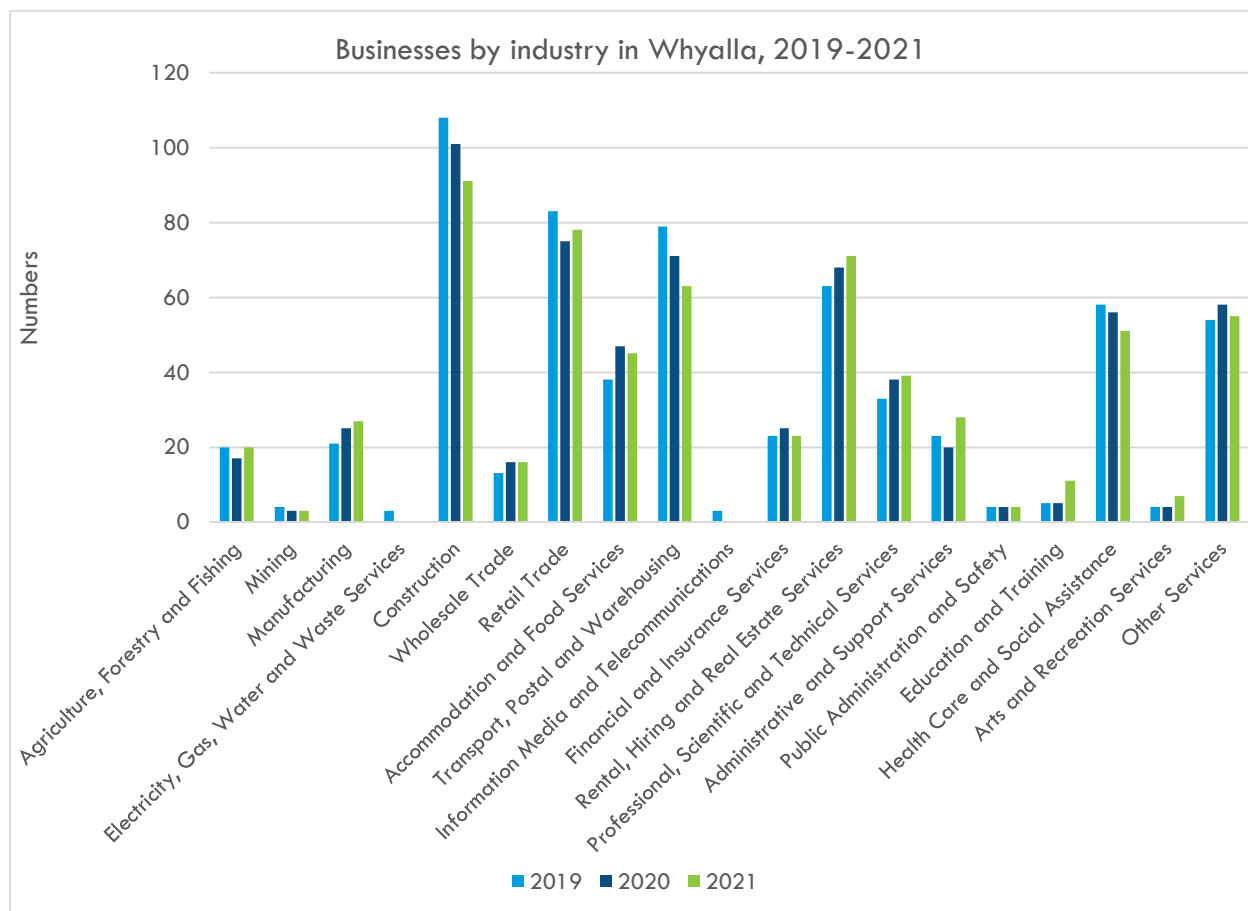
The number of businesses registered in the Whyalla LGA from 2019 to 2020 has remained almost exactly the same over this period, with no indication of particular interruption (see Figure 44). By number of businesses, the Construction industry is the largest, followed by Retail Trade and Rental, Hiring and Real Estate Services. The growth in Construction industry output is in line with the larger number of Construction businesses in the LGA, as well as growing employment. While the total number of Construction businesses has declined by 19% or 17 businesses over this period, the recently released **Spencer Gulf Housing Survey Report** estimates that the current pipeline of projects in the region will conservatively add 4,000 construction workers to Whyalla, with 810 ongoing positions. As such, this industry is expected to grow across all three indicators.

Proportionally, the Education and Training industry has grown its share of businesses the most, increasing by 55% from five in 2019 to 11 in 2021 – ideally this indicates a greater presence of learning and training institutes that can support training of the local labour force. The largest growth by total number of businesses is in the Rental, Hiring and Real Estate Services industry which added eight new businesses (see Figure 45).

It should also be noted that, in the **Transforming the Upper Spencer Gulf** paper, Whyalla, as well as Port Augusta and Port Pirie, have only an average or low capacity in fast growing industries such as health, education, profession, scientific and technical, and telecommunications industries. This would limit economic performance over the next five years.

However, in the **Whyalla Economic Development Strategy 2022-2030**, the Whyalla City Council has noted its intent to work with businesses to develop their capabilities and maximise investment and jobs associated with the Defence industry and the Cultana Training Area Redevelopment phase 1 project. Council's intent is to support small and medium enterprises to become suppliers of choice for the Defence industry. There is also the opportunity for businesses to leverage the significant renewable energy projects planned for the region, as well as the continuing opportunities from the Middleback Ranges mine and Whyalla's sea port.

Figure 45 Businesses by industry - Whyalla, 2019 to 2021



HOUSING, EDUCATION AND HEALTH

RENTAL AND SALES MARKETS

As shown in Figure 46, the volume of rental listings in the Whyalla LGA over the last 10 years peaked in late 2017, growing from less than 400 in 2013 to more than 1,400. Rental volumes again reached a similar low during 2021/22. However, the vacancy rate in the region is significantly lower now than it was in 2013, indicating that there is more demand for rentals now than previously seen. As of March 2022, the vacancy rate is 1.2%, well below the minimum 3% needed to ensure some accessibility to housing in the market (see Figure 47). A similar pattern has been seen in median rental prices which were as high as \$295 in 2013, declining to \$170 in 2017 and 2018, before rising again to \$260 in 2022.

Figure 46 Rental market (12 months) - Whyalla, 2013 to 2022

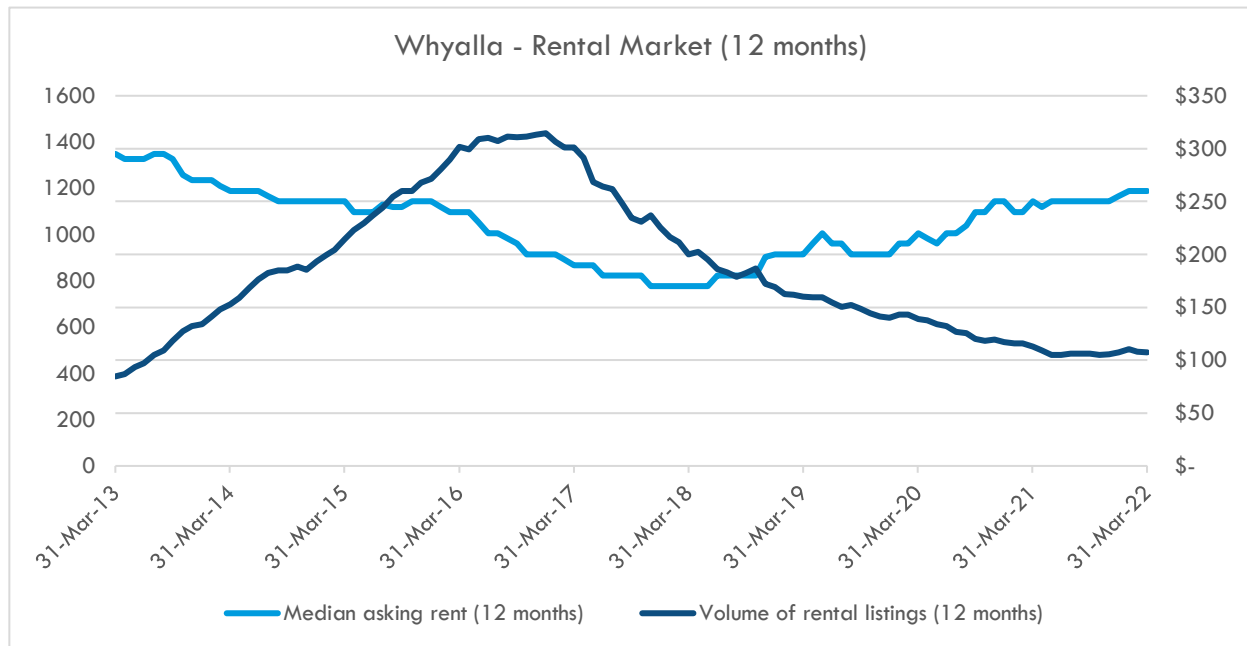
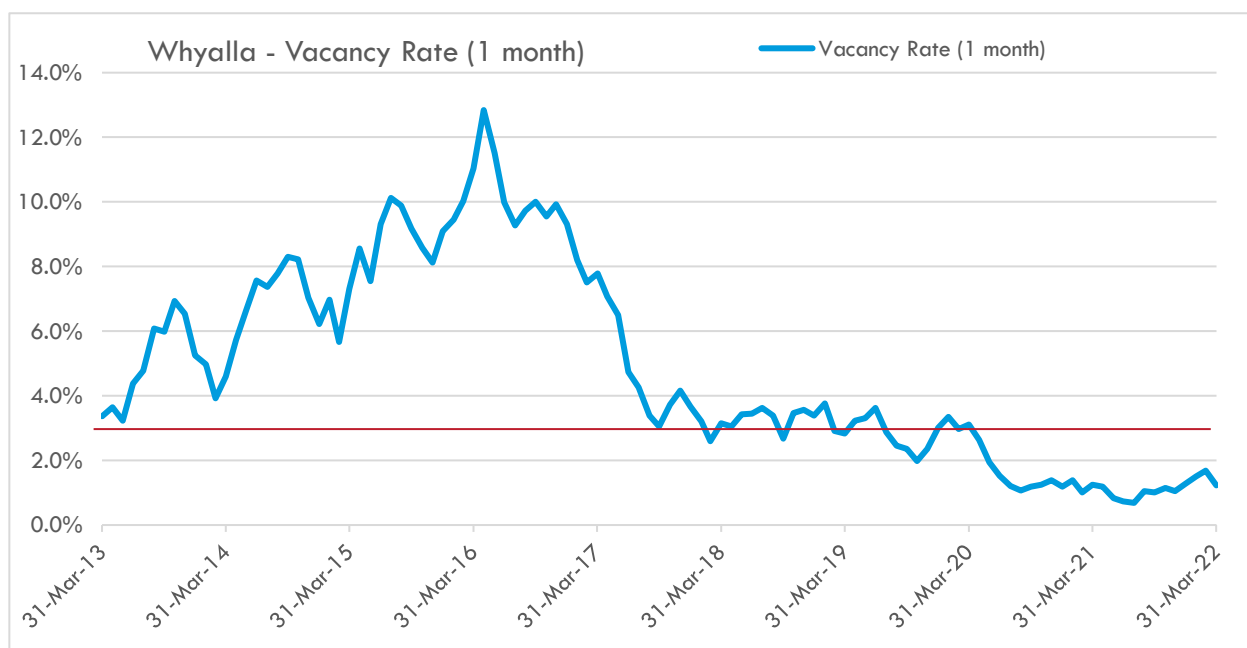


Figure 47 Vacancy rate (1 month) - Whyalla, 2013 to 2022



The number of properties sold in the region has been climbing since mid-2017, in line with the decline in rental property listings, and is now at a record high (for the decade) of 516 properties. This increase sharpened significantly during the COVID-19 pandemic (see Figure 48).

However, median sales prices have not followed suit, remaining relatively stable since just before the pandemic, when they rose from a decade low of \$147,000 in 2018. However, they have not yet risen to the highs of \$230,000 experience in late 2014 and early 2015. Similarly, the 75th percentile price for homes in the LGA is holding around \$280,000, after a decade low of \$215,000 in 2018 (see Figure 49).

The **Spencer Gulf Housing Survey Report** found that increased demand for rental properties in Whyalla can be attributed to the significant infrastructure pipeline in the LGA: the new high school, solar farms, and energy infrastructure. This increased demand is having an impact on lower-income households who are now struggling to access the rental market, which is subsequently increasing the demand for social and public housing. In terms of Government Employee Housing (GEH) Program, in Whyalla it is currently at full capacity and as a consequence some Government employees have had to access temporary accommodation until other accommodation has become available. The demand by the Fly-in/Fly-out (FIFO) workforce was also noted. The Whyalla City Council would like to discourage FIFO in favour of workers residing in the City.

This report highlighted that in terms of sales, listing numbers are the lowest in several years, with more property sold than listed. In line with the above data from the sales market, this report further noted that 'the calendar year 2019 was the strongest market since 2014 (before the ore price fell)'. Despite this, the report did note that the market was sensitive to price and property quality.

The **Whyalla Economic Development Strategy 2022-2030** further supports this assessment of housing availability in the City. It notes that the significant inflow of workers for large scale infrastructure projects has placed unprecedented demand on housing supplies and other accommodation providers. This has subsequently placed additional pressure on public and social housing stocks, much of which the strategy notes require refurbishment. Further, recruiters are struggling to hire due to the lack of suitable housing, while short term accommodation is at capacity and hindering the progression of some large projects. As such it is estimated that 100 affordable homes will be required in the medium term, and another 250 to 300 by 2030.

Figure 48 Sales market (12 months) - Whyalla, 2013 to 2022

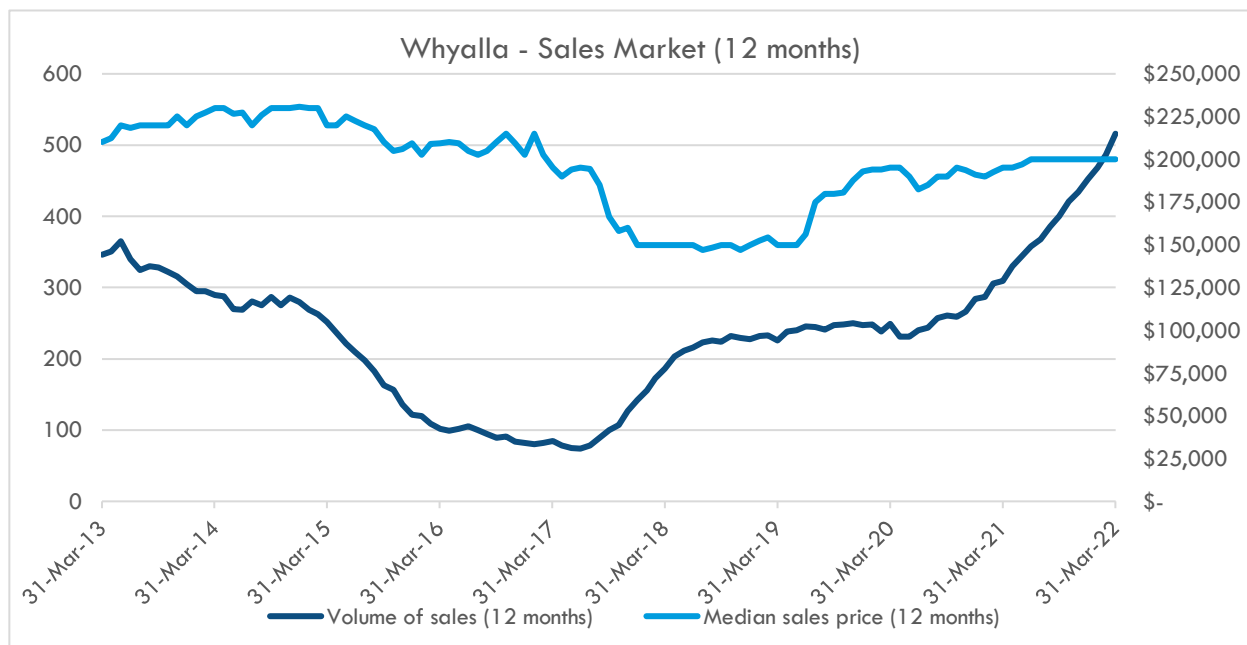
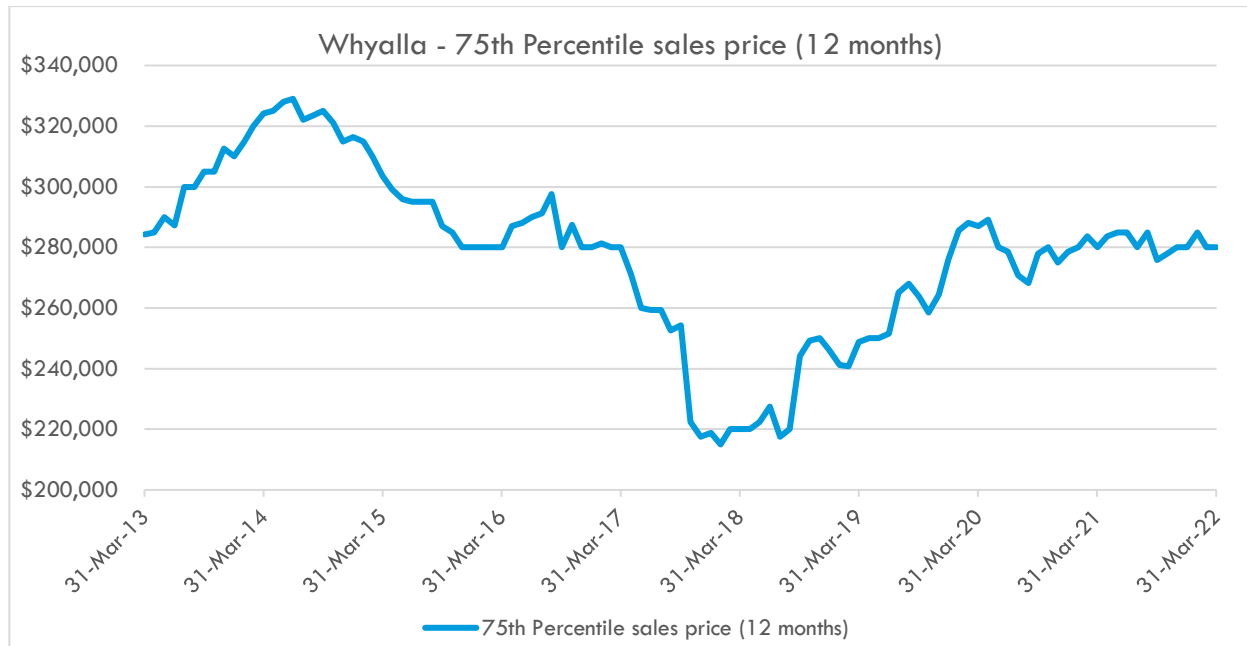
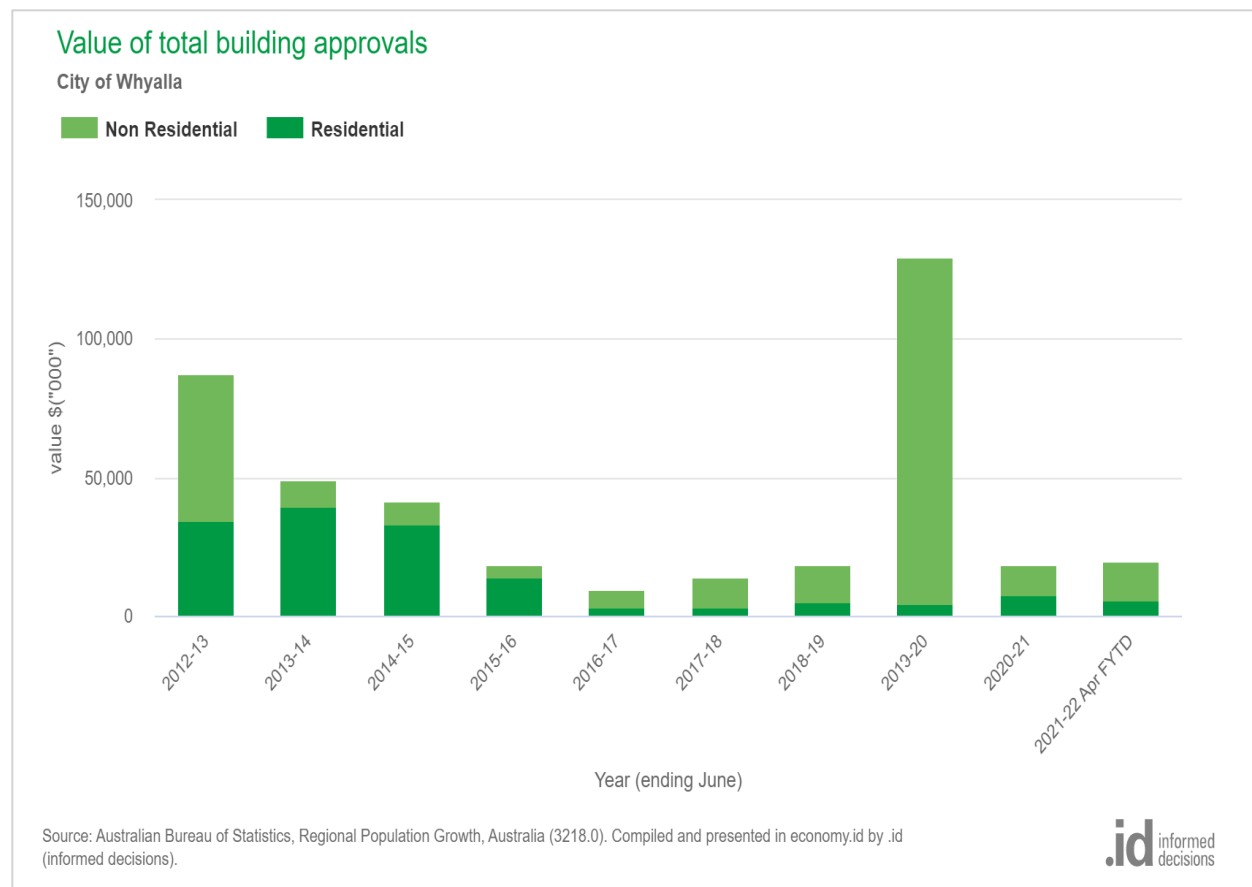


Figure 49 75th percentile sales (12 months) - Whyalla, 2013 to 2022



BUILDING APPROVALS

Figure 50 Value of total building approvals - Whyalla, 2012/13 to 2021/22. Source: Economy ID



The value of total building approvals in Whyalla has been increasing since 2016/17, with a particularly significant spike in 2019/20 (see Figure 50). This was after a decline in the value of approval from 2012/13 and 2016/17, from \$87million to \$6.6million. The steady increase in the value of total building approvals indicates confidence in the market and is driving the LGA's Construction industry, and the steady approval for residential buildings will likely lead to an increase in the quality and quantity of the housing stock in this LGA. This will continue to support the Construction industry in the LGA.

However, data from CoreLogic indicates that the value of residential building in Whyalla is still low, at \$354 per capita²⁴. For context, the highest value of residential building work per capita is in Robe at \$12,503 and the lowest Peterborough at \$7 per capita.

The **Spencer Gulf Cities Housing Report** highlighted that Whyalla has both privately and publicly owned land that is suitably zoned and available for development and would support a range of housing development projects. The City of Whyalla Council identified 10,370 allotments of land available for housing under a variety of government ownerships. However, despite both the strong sales market and the availability of land, land sales have not been strong – this is due to significant wait times and costs for building. The report identified a number of other barriers to building new housing, including: limited number of developers locally, lack of local construction companies, and high infrastructure costs.

EDUCATION AND HEALTH SERVICES

Whyalla has 10 primary and secondary schools, most of which are public²⁵. Whyalla Secondary College – which opened in term 1 of 2022 – replaced the city's three previous public high school campuses and has capacity to educate some 1,500 students²⁶. Outside of the public system is the Catholic R to 12 school, Samaritan College; and the independent R to 10 Christian school, Sunrise Christian School. Whyalla also has a school specialising in education for R to 12 students with disabilities and complex learning needs, the Whyalla Special Education Centre.

The major health facility in Whyalla is the Whyalla Hospital and Health Services facility, with services that include²⁷:

- 24-hour accident and emergency services
- General medical and specialist surgical care
- Anaesthetic, cardiac, obstetric, and neonatal services
- Chemotherapy and renal dialysis services
- Regional cancer resource centre
- Rehabilitation services
- Tele-rehabilitation service
- Integrated mental health services
- Stroke services

Primary health care in Whyalla is delivered through the five major General Practices²⁸ (all of which bulk bill) and a range of allied and community health providers including dentists, orthodontists, chiropractors, physiotherapists, optometrists, and three pharmacies²⁹.

The **Transforming the Upper Spencer Gulf** paper noted Whyalla's (in conjunction with Port Augusta and Port Pirie) role as a health and education service centre and went on to recommend the relocation of Country Health SA to Whyalla to complete the State Government's then investment in the Whyalla Hospital.

²⁴ This is based on June 2020 approval and 2020 estimated residential population figures

²⁵ City of Whyalla. (2022) Education Institutions. <https://www.whyalla.sa.gov.au/our-city/education-and-employment>

²⁶ Department of Education (2022) Whyalla Secondary College. <https://www.education.sa.gov.au/parents-and-families/enrol-school-or-preschool/new-schools-and-major-upgrades/whyalla-secondary-college>

²⁷ SA Health (2022). Whyalla Hospital and Health Service. <https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/services/hospitals/regional+hospitals+and+health+services/funlhn+hospitals+and+health+services/whyalla+hospital+and+health+service/whyalla+hospital+and+health+service>

²⁸ Health Direct. (2022) General Practice Whyalla https://www.healthdirect.gov.au/australian-health-services/results/whyalla-5600/tihcs-ah-11222/general-practice?undefined&pageIndex=1&tab=SITE_VISIT

²⁹ City of Whyalla. (2022) Whyalla Hospital and Health Services <https://www.whyalla.sa.gov.au/our-city/health-services>

ROXBY DOWNS

SUMMARY

- The Roxby Downs LGA's population and working-age population have been declining since 2012, in line with the cancellation of expansion plans for the BHP Billiton mine - Olympic Dam.
- Growth in population in this LGA can be attributed to natural increases and overseas migration, however this growth has not been sufficient to outweigh outwards migration to other parts of Australia.
- In contrast the Indigenous population has grown over the last 10 years, with the proportion of population increasing from 1.6% to 5%, and this includes specific growth in its working-age population from 2016 to 2021.
- It is likely that this loss of population is due not only to changes in the demand in the mine, but also the lack of tertiary education and training systems to support young people to train in place, and the economy and job market's singular reliance on the mining industry. However, there is provision for Years R to 12 education provided in the town, and recently the UniHub opened a local program in partnership with BHP to support access to higher education.
- Local industry is heavily reliant on the mining industry in Roxby Downs, however there is opportunity to increase the benefit of this through greater local expenditure, driven by increased local capabilities.
- The Roxby Downs unemployment rate is extremely low, at below 2%, indicating that there is no spare capacity in this labour market for industry to tap into. As such new employees both for the mine and other industries will need to be brought in either temporarily (FIDO/DIDO) or permanently from elsewhere.
- Importantly, it is noted that Roxby Downs is home to approximately two-thirds of the mine's workforce, indicating attracting and retaining workers in this region is possible.
- While the LGA's population has declined, demand for housing has grown, with the number of rental listings declining substantially and availability among those listings at 2.3%, below the minimum 3% needed in a market. This will impact further recruitment and resettlement in the LGA.
- Further, whilst there is some residential construction activity in the LGA, the value of approvals per capita in the LGA is extremely low, and as such it is unlikely much new housing is being added to this market. Options such as housing workers in the nearby town of Andamooka have been raised to tackle this issue.
- Health services in the LGA are limited, although a local GP practice provides primary health care as well a range of ancillary services such as pathology. Both the local medical service and GP practice supplement their services through visiting specialist and allied health and shared care arrangements.

PIPELINE

Roxby Downs was built to support the Olympic Dam Mine, owned by BHP Billiton, and opened in 1988. The town is located approximately 560km north of Adelaide. As summarised in the [Roxby Downs Economic Growth and Investment Strategy](#) (released January 2019), in 2012, plans were shelved to expand Olympic Dam which would have made it the world's largest open cut mine, whilst also doubling the population of Roxby Downs over a 10 to 15 year period. Despite the forecasted 70 to 100 year life of the mine, the strategy notes the growth potential of Roxby Downs is still considered uncertain.

The Roxby Downs LGA is part of the Far North Regional Development Australia (RDA) region. In the [RDA Far North Region's submission to the Inquiry into how the development of the mining sector can support businesses in regional economies](#) that as of 2018, 10 of the 12 operating mines in South Australia are located in the Far North Region. Further, of the 30 projects in development in the state, more than half are also in the Far North Region.

POPULATION

The population of the Roxby Downs LGA, currently 3,853, has been declining since 2012, with the greatest decrease experienced in 2016 (see Figure 51). This decline in population can be attributed to the LGA's net internal migration which has been consistently negative for the last five years (2016/17 to 2020/21) and has overridden gains from net natural increases (births minus deaths) and net overseas migration (with the exception of 2020/21 when the Australian border was closed due to the COVID-19

pandemic) (see Figure 52). This trend indicates that whilst the region is able to ‘grow its own’ population, it is struggling to retain them. In contrast, as shown in Figure 53, the Indigenous population in Roxby Downs has been growing between 2011 to 2021. The proportion of Indigenous people living in Roxby Downs has grown from 1.6% of the population to 5% - although it is unknown if this growth is from greater migration or natural increases. Unlike many other places, it does not appear that the COVID-19 pandemic has had a particular impact on the LGA’s population.

Figure 51 Annual change in estimated resident population - Roxby Downs, 2007 to 2021. Source: Economy ID

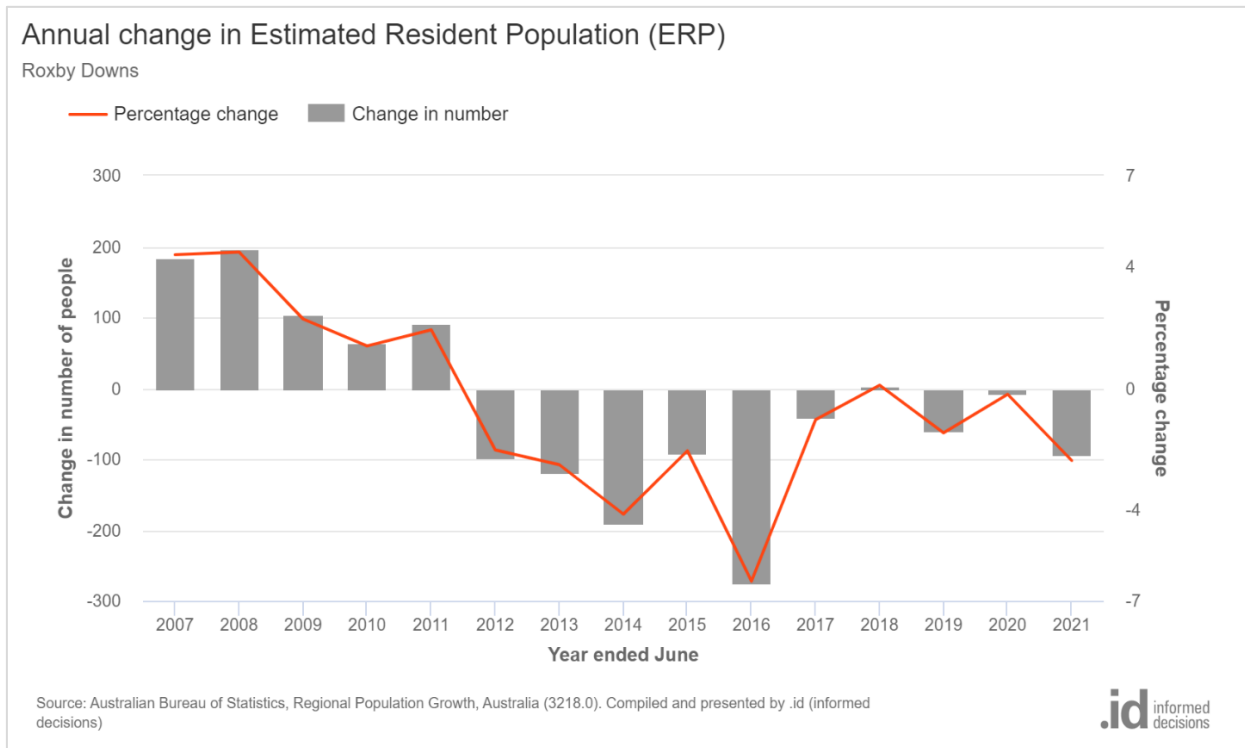


Figure 52 Components of population change - Roxby Downs, 2017 to 2021

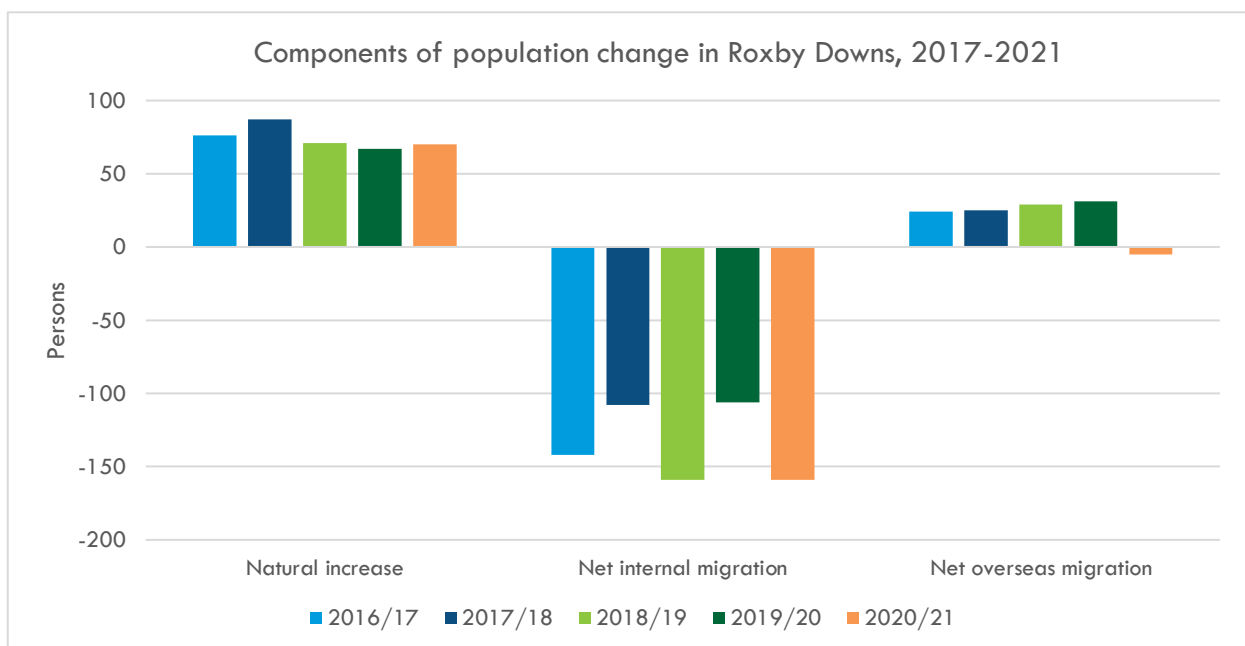
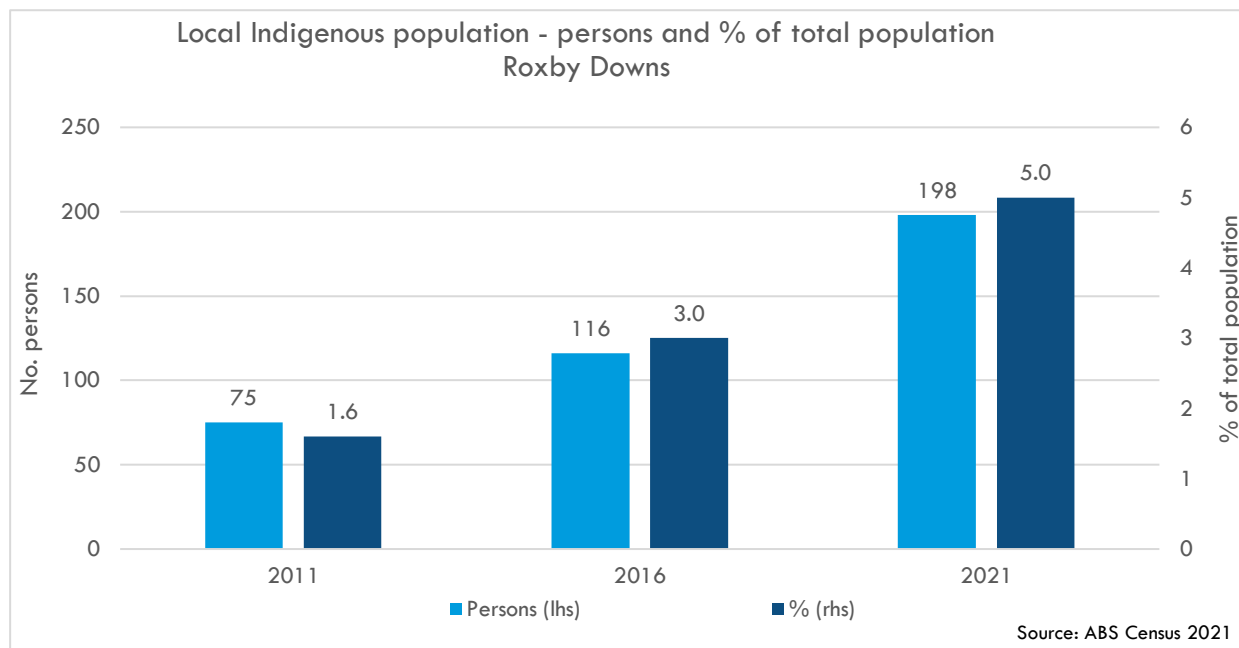


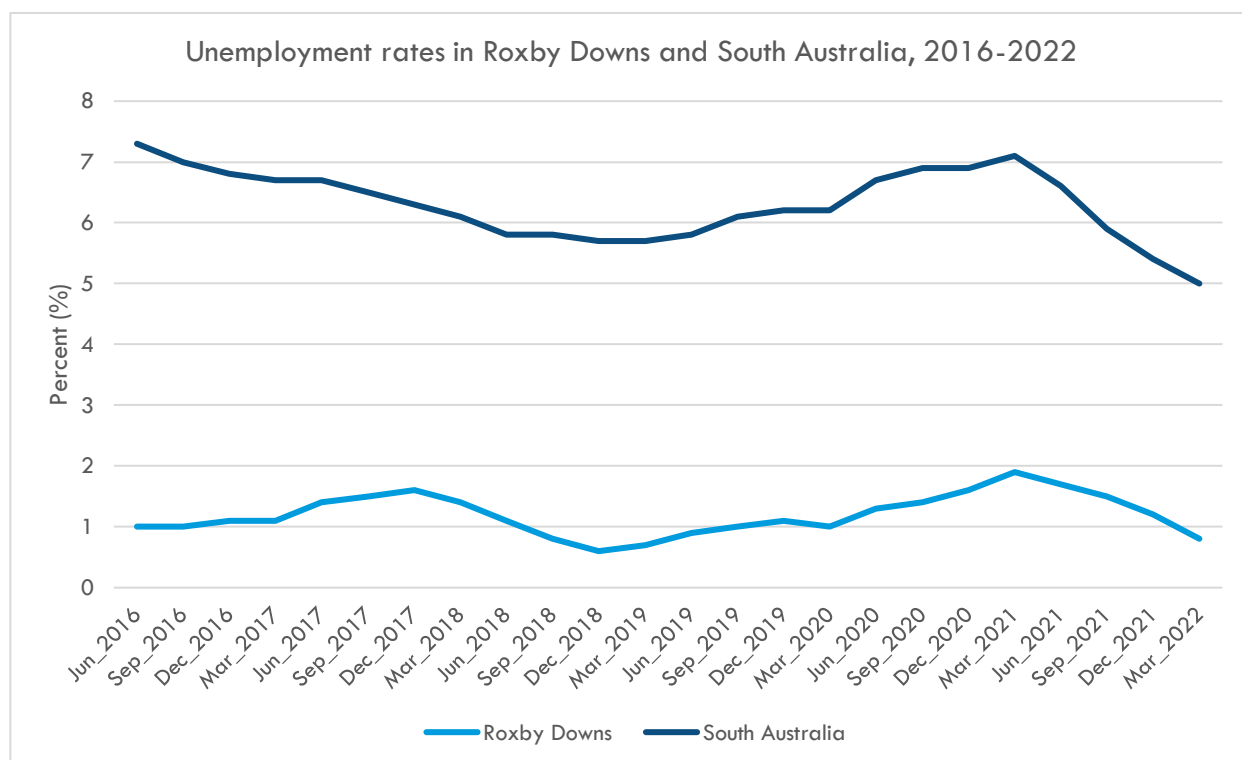
Figure 53 Indigenous population - Roxby Downs, 2011 to 2021



WORKFORCE

UNEMPLOYMENT

Figure 54 Unemployment rate - Roxby Downs and South Australia, 2016 to 2022

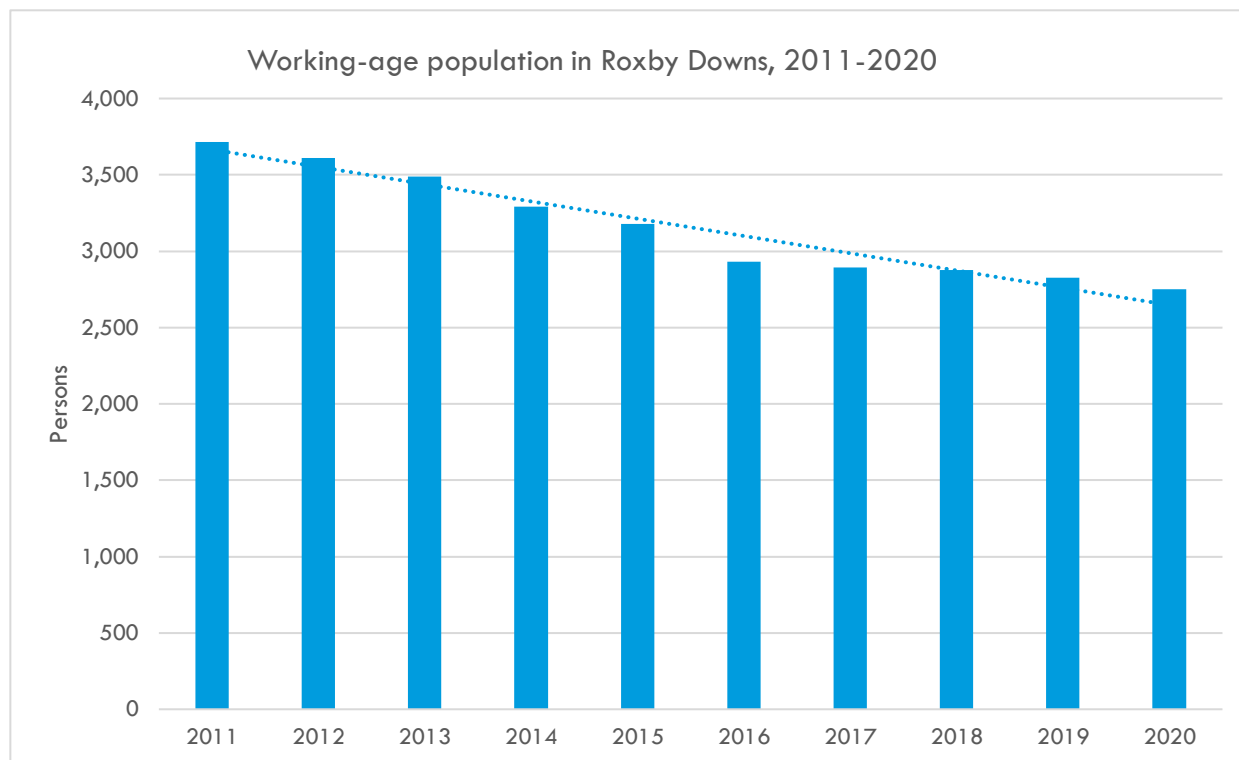


As shown in Figure 54, unemployment in the Roxby Downs LGA has been significantly lower than that of South Australia, having been below 2% over the last five years. This is unsurprising given Roxby Down’s role as a support town for BHP’s Olympic Dam mine. However, changes in the unemployment rate have followed a similar trend as the State rate, including experiencing a peak in early 2021 during the

COVID-19 pandemic. With such a low unemployment rate there is very limited untapped capacity in this labour market and additional employees will likely need to be DIDO or FIFO. This is important as despite the cancellation of the Olympic Dam expansion, growth in production as well as a more pared back plan for further exploration in the mine, will result in the need for an additional 200 to 300 workers over time.

LABOUR FORCE

Figure 55 Working-age population - Roxby Downs, 2011 to 2020



In line with the decline in population in Roxby Downs, there has been a consistent decline in the LGA's working-age population (see Figure 55). This will be due to its net internal migration losses which are likely young people moving away for study and work. This will be impacting on the supply of locals in the Roxby Downs labour market. The **Outback Communities Authority Region Economic Growth and Investment Strategy** notes that the region has very limited campus based access to accredited training and the lack of training and study options in the town mean that migration may be a necessary step for young people in this LGA.

However, in 2021 it was announced that a UniHub Spencer Gulf program would commence in Roxby Downs in partnership with BHP.³⁰ UniHubs provide student support and a space to study a range of tertiary courses, with either UniHub partner universities delivering through the hub, or other tertiary institutions. UniHub provides support degrees in Engineering, Business Administration, Education, Business, Nursing, Psychological Science, Social Work, Education and Digital Media.³¹

The **Far North and Outback Climate Change Adaptation Plan** (released December 2016) also notes that within the next five to 10 years, mining operations will need to adapt to changing and harsher climate conditions. This will happen through greater automation, that in turn will reduce the numbers of worker vulnerable to these conditions. This will require differently skilled workers and subsequent training support.

As for the Indigenous population, it's working-age population has been rising, most significantly over the past four years. Census data shows that it grew from around 70 persons in 2016 to 125 persons in

³⁰ UniHub Spencer Gulf (2021). Growing our own in Roxby Downs. <https://unihubsg.org/2021/10/27/growing-our-own-in-roxby-downs/>

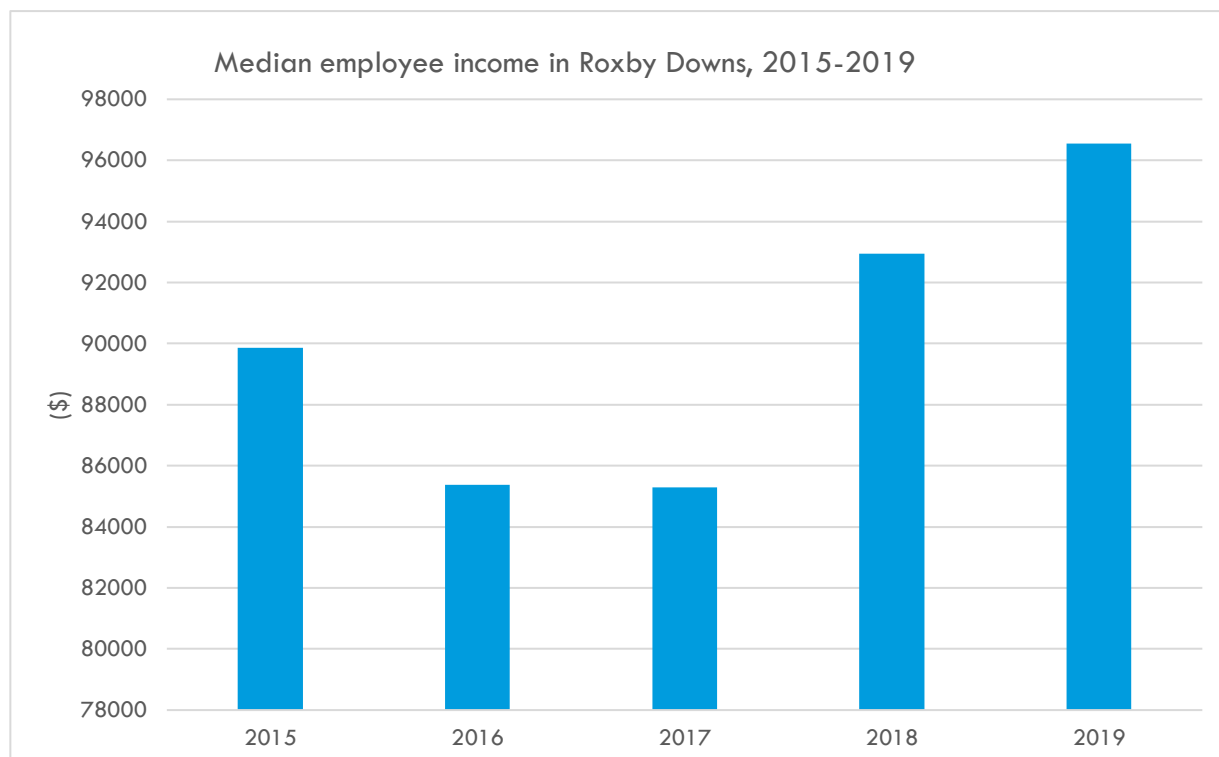
³¹ UniHub Spencer Gulf. (2022). How does the Uni Hub work. <https://unihubsg.org/how-does-it-work/>

2021, or 63% of the local Indigenous population. This may represent an opportunity for Indigenous people to be further engaged in local expansion opportunities.

QUALITY OF WORK

The median income in Roxby Downs in 2019 was \$96,542, significantly higher than the South Australian median income of \$49,888 (see Figure 56). Again, this is in line with the nature of Roxby Downs as the support town for BHP’s Olympic Dam Mine, as well as its significantly lower unemployment rate. This significant median income may be useful in terms of attracting workers to region.

Figure 56 Median employee income - Roxby Downs, 2015 to 2019

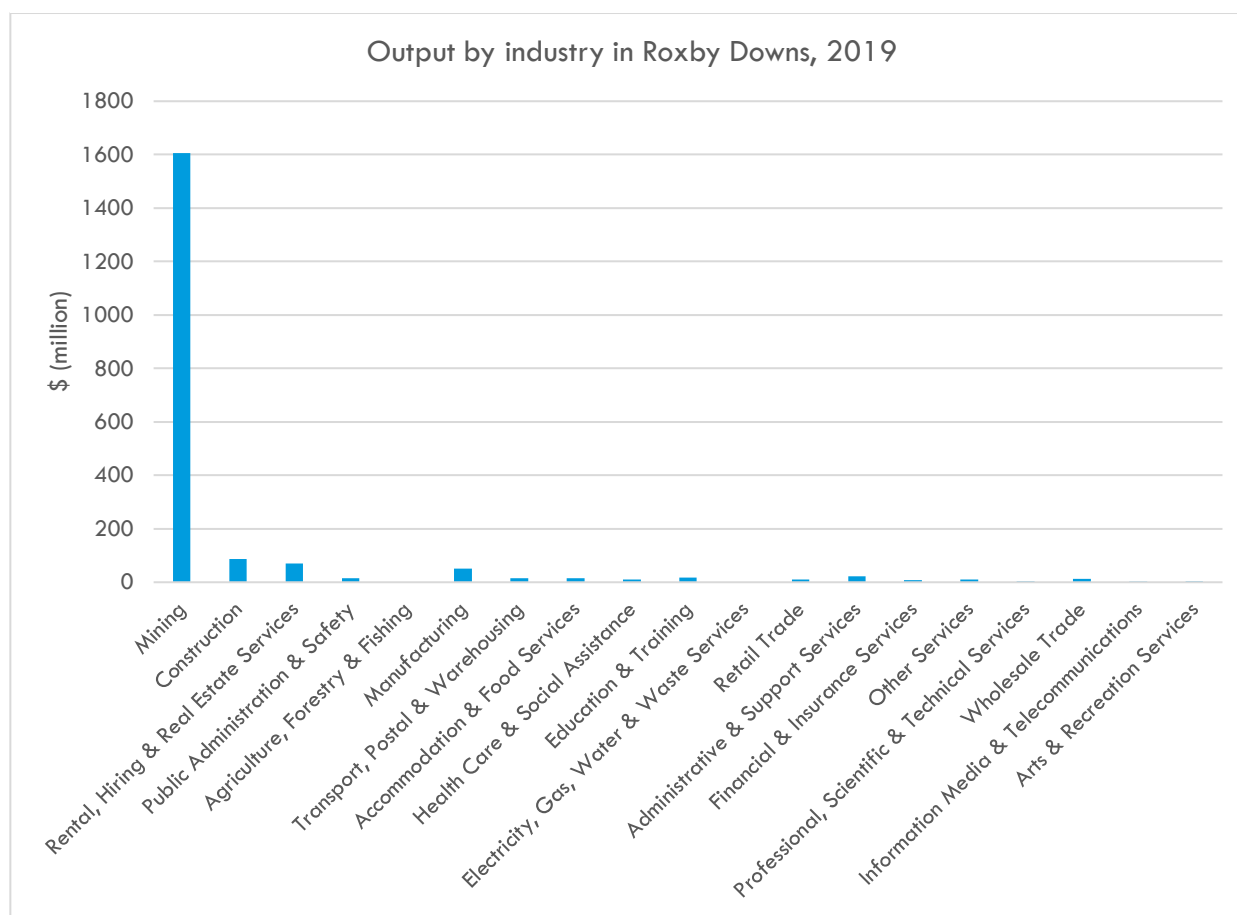


INDUSTRY

ECONOMIC OUTPUT

Roxby Down’s economic output in 2019 was, unsurprisingly, dominated by the mining industry and valued at \$1.6billion which accounted for 82% of economic output in the LGA (see Figure 57). In comparison, the next three highest producing industries – Construction, Rental, Hiring and Real Estate Services, and Manufacturing, combined produced output valued at \$209million, accounting for just 11%.

Figure 57 Output by industry - Roxby Downs, 2019



The **Outback Communities Authority Region Economic Growth and Investment Strategy** (January 2019) highlights the key role of mining in the Far North Region of South Australia (inclusive of Roxby Downs) and that it is undergoing significant change due a slowdown in the resources and mining sector. The majority of the region’s economic activity can be linked either directly or indirectly to mining activities, however a significant proportion of the economic benefits of these activities flow out of the region. The single industry nature of the region’s economy, as well as its remoteness, increases its vulnerability to economic shocks and population changes. This has subsequent flow on affects to the provision of services. However, increased economic activity in the region over the five years will be attributed to mining activities by BHP and OZ Minerals, in relation to their Olympic Dam and Carrapateena assets.

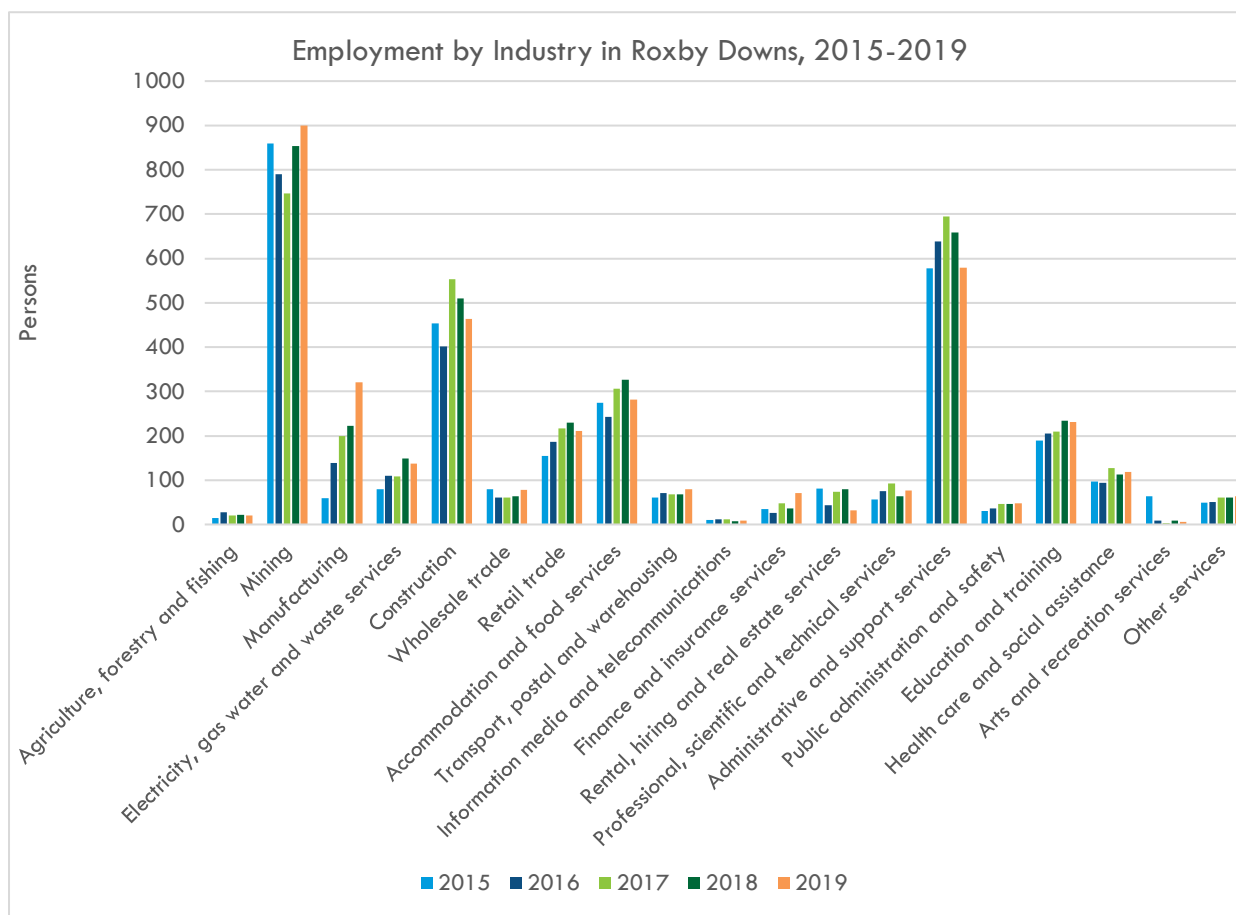
The **Roxby Downs Economic Growth and Investment Strategy** further highlights the Roxby Downs’ regional comparative advantage is reliant on the mining sector and highlights that the Gross Regional Product (GRP) for the Roxby Downs Region (as opposed to LGA) is approximately \$212,000 per workers, and \$128,000 per capita which is significantly higher than the \$62,100 per capita for South Australia. This is reflective of the high value nature and strength of the mining industry in Roxby Downs, and in line with the significantly higher median income in the LGA.

INDUSTRY OF EMPLOYMENT

As seen in Figure 58, industry employment in Roxby Downs is significantly more diverse than industry output with mining accounting for 900 or 24% jobs out of 3,729. The next highest employing industries in 2019 were Administrative and Support Services (16%) and Construction (12%), both of which would likely be providing services to the BHP mine.

While the majority of industries in Roxby Downs now have higher employment in 2019 than in 2015, a large share of different industries’ employment peaked in the intervening years. The industry that has seen the most growth from 2015 to 2019 is Manufacturing (82% or 262 jobs), whilst the Arts and Recreation Services industry declined by 950% or 57 jobs.

Figure 58 Employment by industry - Roxby Downs, 2015 to 2019



The **Roxby Downs Economic Growth and Investment Strategy** notes that the mining industry ‘... displays a high level of employment self-containment, with almost two-thirds... of the mining workforce residing in Roxby Downs.’ The strategy notes the benefit of this to the long-term sustainability of the town, with many other places having significant FIFO and DIDO workforces. The strategy also highlights the contribution of a growing tourism sector in Roxby Downs. The Tourism sector, an amalgamation of food, retail, accommodation, arts, and transport sectors, is estimated to be valued at 1% of the regional output and 4% of jobs, which the strategy notes is higher than some of the sectors in the economy – including Health care and Social Assistance.

BUSINESSES

The total number of businesses in Roxby Downs has remained stable from 2019 to 221, with only a slight decline in 2020 (see Figure 59). The Construction industry has and continues to account for the largest number of businesses in the LGA (23), followed by Rental, Hiring and Real Estate Services (15) (see Figure 60).

The **Roxby Downs Economic Growth and Investment Strategy** notes that there is an opportunity to increase local business by increasing the value of local expenditure by industries. Mining and construction industry spending on goods and services from outside the region are approximately 70% of total expenditure on inputs. The strategy notes the opportunity to divert a greater proportion of this spending into local good and services, with the development of local capabilities. This would build on the strong links the mining industry has with the community and local economy. The strategy also highlights the opportunity to continue developing other, what it calls ‘driver’ industries including Construction, Administrative and Support Services and Manufacturing sectors to diversify the local economy. However, the RDA Far North’s **Jobs for the Future in Regional Areas Submission** also noted that local businesses have at times found it difficult to take advantage of opportunities from the mining sector, as they lack the necessary skills in their staff, as well as an ability to upskill. This furthers the point made in the discussion of the

Roxby Downs labour force, that the region requires greater training support.

Figure 59 Registered businesses - Roxby Downs, 2019 to 2021

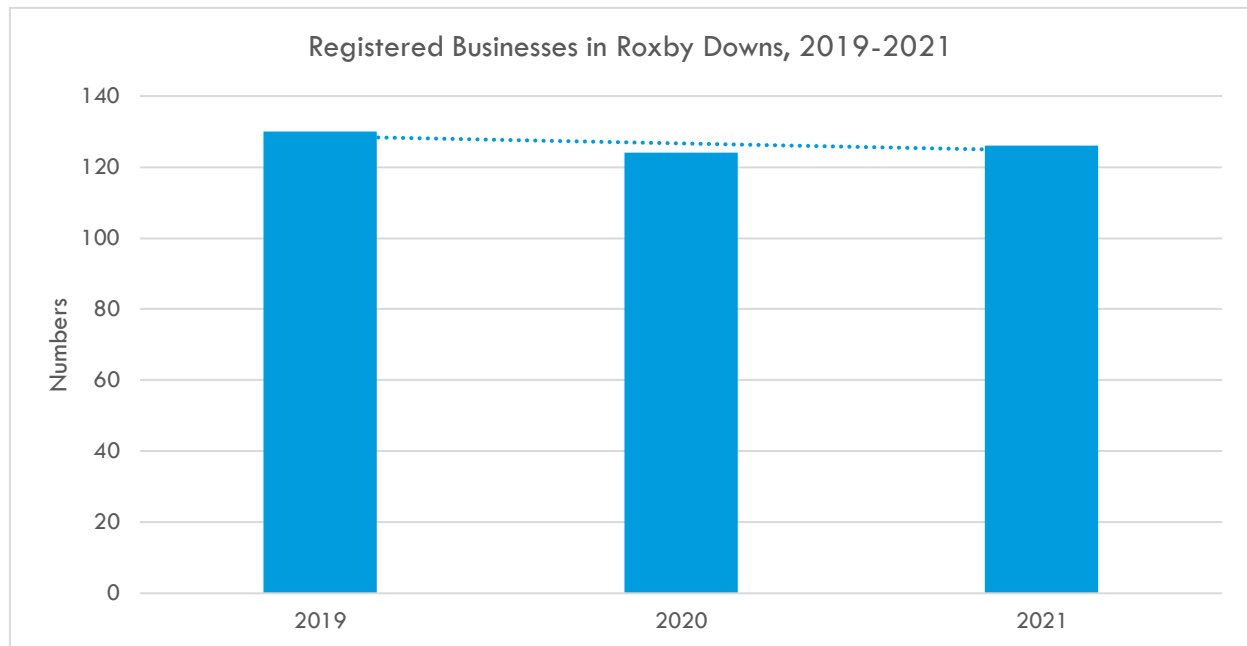
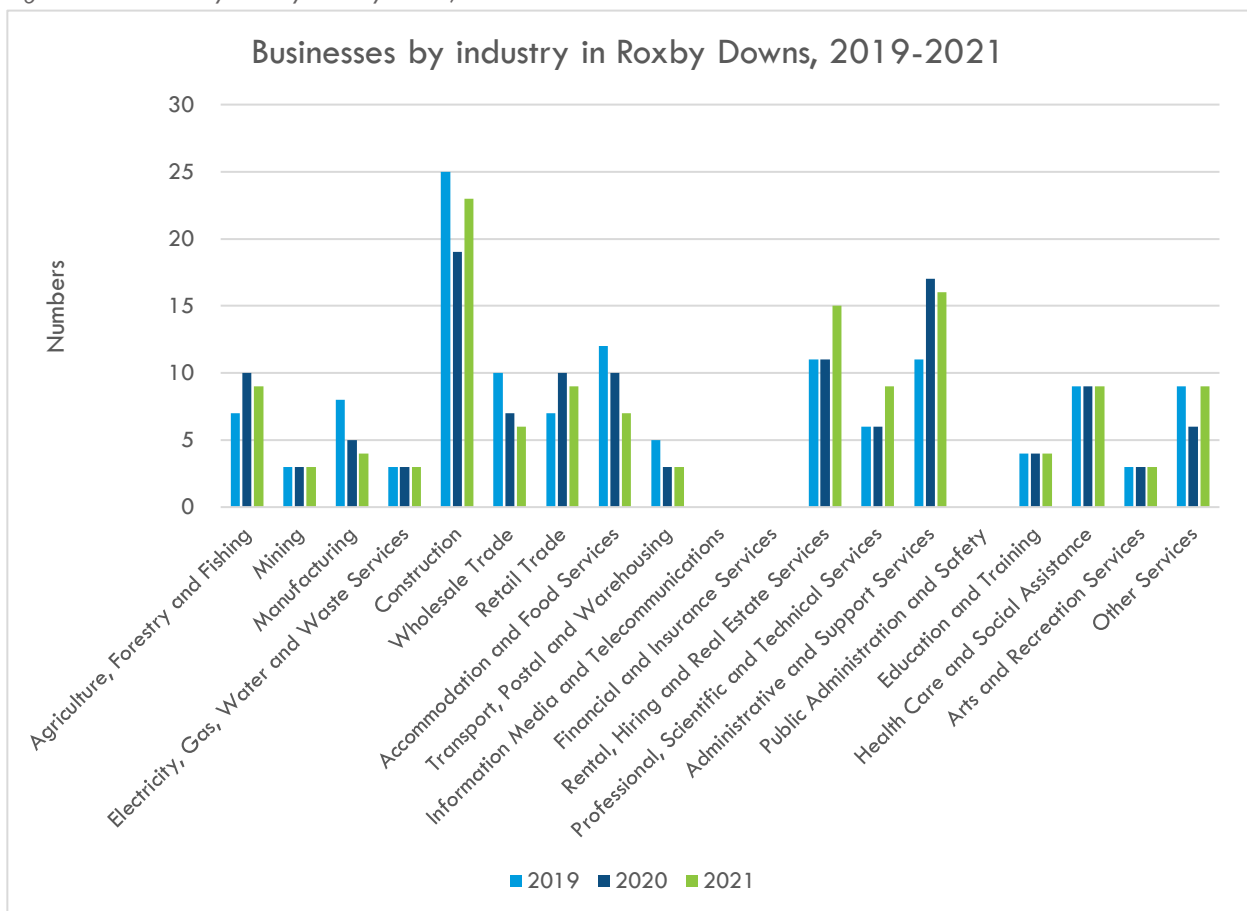


Figure 60 Businesses by industry - Roxby Downs, 2019 to 2021



HOUSING, EDUCATION AND HEALTH

RENTAL AND SALES MARKETS

As shown in Figure 61, the volume of rental properties in Roxby Downs has been on a stark downward trend since a mid-2016. There was period of recovery during early 2019 before declining to less than 200 properties, a low not experienced in the LGA since 2013. With the rise in listings between 2013 and 2016, median asking rents strongly trended downwards, plateauing in late 2016, early 2017 at \$200, before significantly increasing to \$290 in early 2018. The median rental price appears to have plateaued again but this time at a high of \$380.

However, at odds with this 2013 market tightness, is a high vacancy rate of over 16% for the properties in the market, indicating that these high prices were not in line with demand (see Figure 62). The vacancy rate in the LGA has since experienced significant ups and downs, including falling as low as 0.5% in late 2017, in line the growth in median rents. The vacancy rate subsequently recovered, before sharply declining from 9% in early 2020 to its current 2.3%, indicating limited supply in the current rental market.

Figure 61 Rental market (12 months) - Roxby Downs, 2013 to 2022

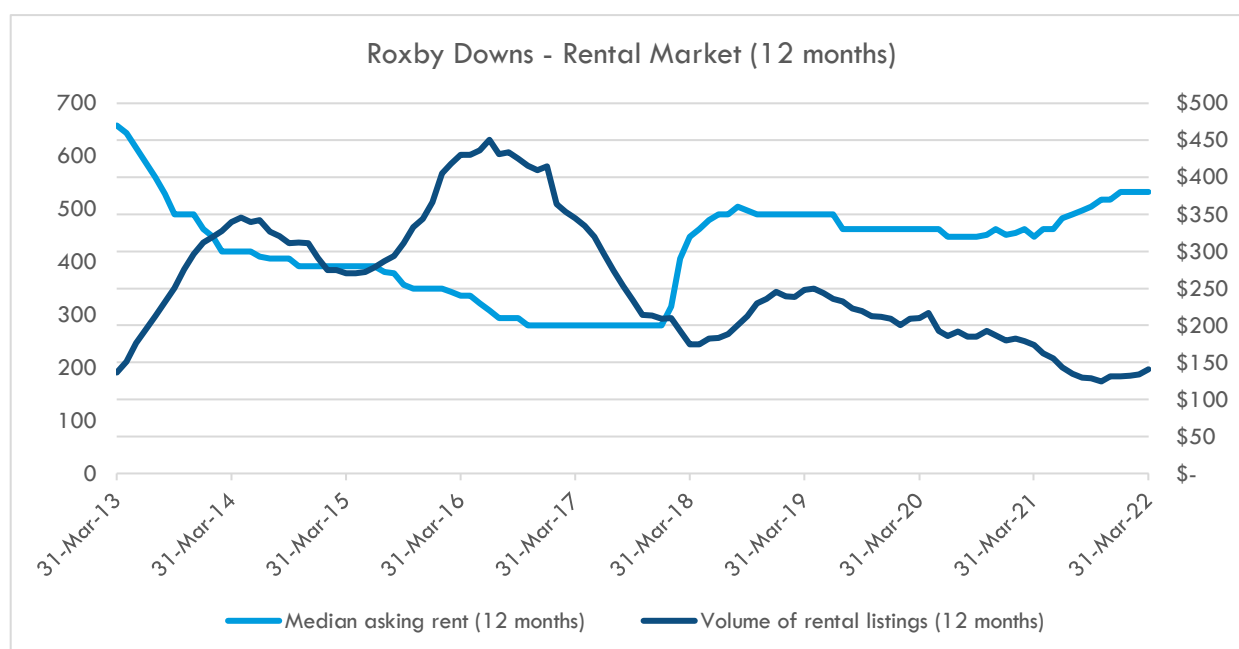
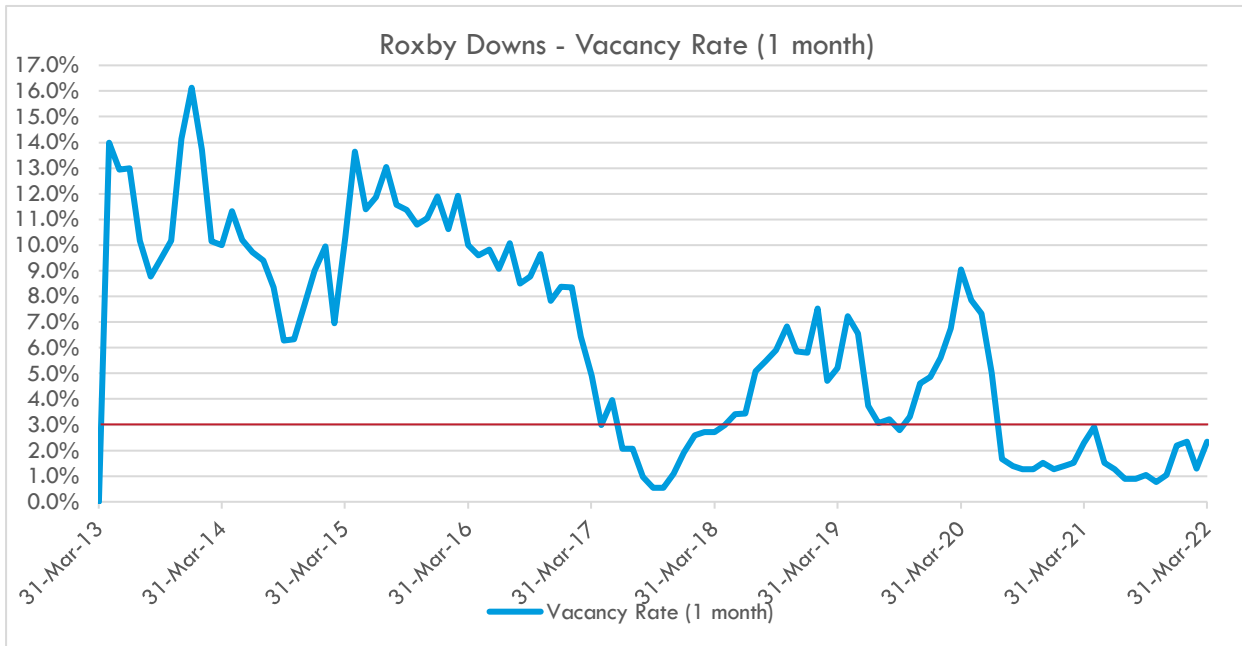


Figure 62 Vacancy rate (1 month) - Roxby Downs, 2013 to 2022



Sales data for this LGA for the decade is not complete and sales volumes are not high, compared to the other LGAs. As seen in Figure 63, in 2013 sales volumes dropped from a decade high of 60 to just 7 sales in early 2016. Dwelling sales volumes then peaked in the region in the first half of 2018 and proceeded to decline to below 20 in mid-2020, before climbing again and plateauing at between 30 and 40 sales. Subsequent to the significant drop in sales volumes was a peak in median sales prices in the second half of 2013. However, after an initial decline, median sales prices have remained relatively steady since 2016, peaking at \$262,500. The 75th percentile sales price, the price of high value properties in the market, has followed a similar trajectory, with some growth during the COVID-19 period (see Figure 64Figure 63).

Noting the *Roxby Downs Economic Growth and Investment Strategy's* point that a large proportion of those employed in the mining industry reside in Roxby Downs, the predicted expansions to mining operations in this region and subsequent increases in residential employment may be limited by the availability of housing. However other options have been noted, such as housing workers in the town of Andamooka instead.

Figure 63 Sales market (12 months) - Roxby Downs, 2013 to 2022

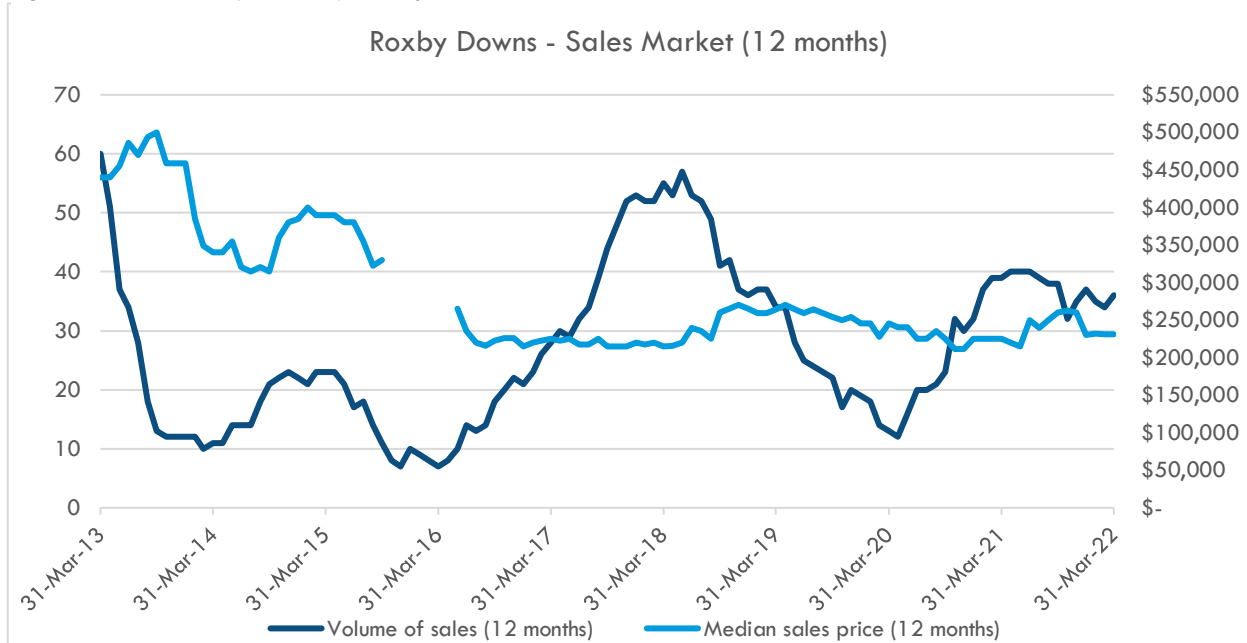
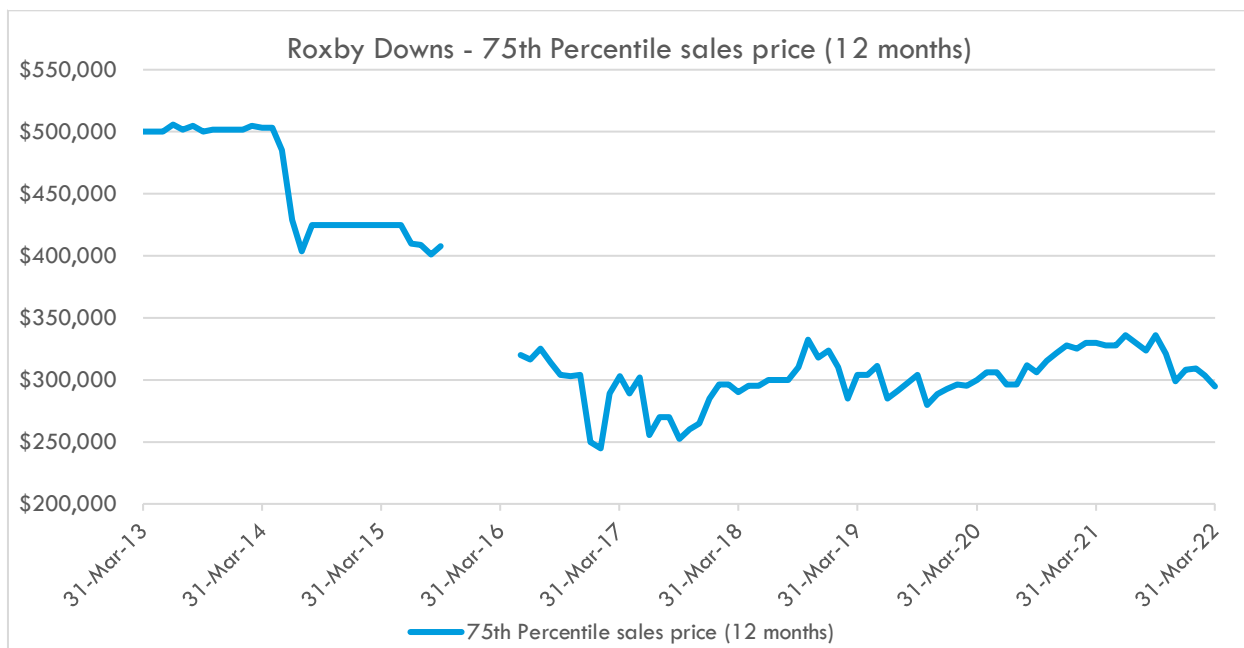


Figure 64 75th percentile sales price (12 months) - Roxby Downs, 2013 to 2022



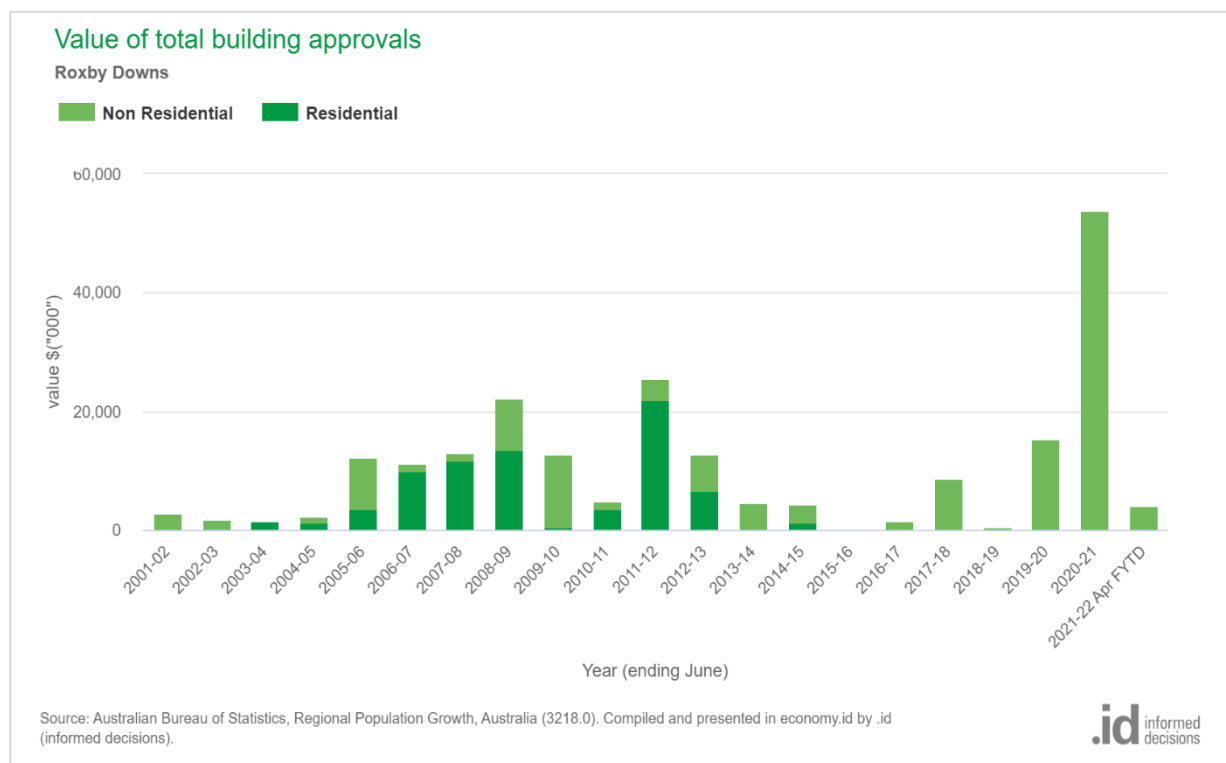
BUILDING APPROVALS

The value of total building approvals in the Roxby Downs LGA in 2020/21 was the highest it has been over the last two decades. However almost all of the value of approvals can be attributed to Non-residential buildings. The value of Residential building approvals has not been higher than Non-Residential building approval since 2012/13 (see Figure 65).

This significant pipeline of approvals for the LGA will continue to drive output, employment, and businesses in the Construction industry. However, noting there is very little value attached to residential building, it is unlikely that any new housing will be added to the LGA's stock. This is supported by data from CoreLogic indicating that the value of residential building in Roxby Downs is very low at \$38 per

capita³². For context, the highest value of residential building work per capita is in Robe at \$12,503 and the lowest Peterborough at \$7 per capita.

Figure 65 Value of total building approvals - Roxby Downs, 2001/2002 to 2021/22. Source: Economy ID



EDUCATION AND HEALTH SERVICES

Roxby Downs is serviced by the Roxby Downs Health Service and the Roxby Downs Doctors Surgery. The health service provides accident and emergency, general medical, and visiting services. Visiting services include:

- dietician
- diabetes educator
- child and youth health clinics
- immunisation
- occupational therapist
- physiotherapist
- podiatrist
- speech pathologist.

Whilst birthing facilities are not available in Roxby Downs, there are shared care arrangements in place and community midwives available. Paediatric and Gynaecological/Obstetric specialists also visit monthly. Mental health services for adults, and children and adolescents are provided by visiting services.³³

The Roxby Downs Doctors Surgery provides a range of care options, including GP services, pathology, ultrasound, allied health, visiting specialists, seven days per week and after hours. Services are provided by both local doctors and doctors and health care professionals in Adelaide³⁴. There is also a local pharmacy available.

³² This is based on June 20201 approval and 2020 estimated residential population figures

³³ SA Health. (2022). Services at Roxby Downs Health Service.

<https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/services/hospitals/regional+hospitals+and+health+services/funlhn+hospitals+and+health+services/roxby+downs+health+service/services+at+roxby+downs+health+service>

³⁴ Roxby Downs Doctors Surgery. (n.d.). Roxby Downs Doctors Surgery. Retrieved October 3, 2022, from <https://www.roxydoctors.com.au/>

There is one school in Roxby Downs, the Roxby Downs Area School which provides Years R to 12 for 560 students. As with the rest of the town, the school was established to support Olympic Dam. It has recently undergone a \$7 million refurbishment to upgrade existing facilities and shares local facilities such as tennis courts with the leisure centre.³⁵

As previously noted in *Outback Communities Authority Region Economic Growth and Investment Strategy*, Roxby Downs students do not have any campus based access to tertiary or VET training in the region. The *Roxby Downs Economic Growth and Investment Strategy* notes the important role Roxby Downs plays as a regional centre, providing core services such as health and education. However, it also notes that the town's isolation and single-industry reliance impedes the delivery of these services. The *Outback Communities Authority Region Economic Growth and Investment Strategy* highlighted the opportunity to overcome this challenge, at least in part through improved ICT networks.

³⁵ Department for Education. (2022). *Roxby Downs Area School*. <https://www.education.sa.gov.au/parents-and-families/find-schools-preschools-other-services/roxby-downs-area-school>