

Naracoorte Lucindale Council

*Economic Development Plan*

2017 - 2019

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## Abbreviations

DEWNR	Department of Environment Water and Natural Resources
DPTI	Department of Planning, Transport and Infrastructure
NLBTA	Naracoorte Lucindale Business and Tourism Association
NLC	Naracoorte Lucindale Council
NRLE	Naracoorte Regional Livestock Exchange
PIRSA	Primary Industry Research of South Australia
RDA	Regional Development Australia
LCLGA	Limestone Coast Local Government Association
RAI	Regional Australia Insititue

# EXECUTIVE SUMMARY

The purpose of this document is to provide elected members with information that will help guide and support Naracoorte Lucindale Council's plans and investment decisions that are fundamental to encouraging and enhancing economic opportunities for the district.

Work towards the Economic Development Plan for the Naracoorte Lucindal Council is framed by four of the 2016-2026 Council Strategic Plan's fundamental objectives;

*Prosperous Community*

*Harmony and Culture*

*Liveable Neighbourhoods*

*Healthy Landscapes*

The Economic Development Plan sits under the council's Strategic Plan and is informed by and supports the objectives of a number of the Council's existing plans, such as NRLE Strategic Plan, Open Space Strategy. It also supports a number of other State and Regional Government plans.



Figure 1 How the Economic Development Plan will fit in with Existing Strategies and Plan

The plan outlines that growth and prosperity in the district will come from a combination of economic drivers:

*Expansion of the local economy to meet growing needs, economic diversification*  
*Changes in Agriculture Activity*  
*Growth of Tourism*  
*Manufacturing and industry expansion*

The key to achieving these economic development goals will be understanding a range of factors, such as;

*Local retail business*  
*Improved IT connectivity, education*  
*Migration, labour force, retirees*  
*Infrastructure, manufacturing*  
*Inter-regional relationships in the broader Limestone Coast*



There are opportunities for the district to prosper, while fostering a harmonious culture and encourage a liveable district. This can be done by focusing on a limited set of objectives to create a larger scale action plan.

Council needs to understand the role it can play in facilitating economic development<sup>1</sup>, particularly in relation to its investment in infrastructure<sup>2</sup> that helps create an environment and atmosphere that attracts people to want

to live and work in the district. This can take the form of improved roads or footpaths. It also includes ensuring there are modern learning and recreation facilities that allows community members to actively participate in the best opportunities that a modern western democracy has to offer to a range of age groups. It also includes Council understanding the needs and challenges of existing business and funding initiatives to support their endeavours. Further details are outlined in the body of the plan.

This plan has been updated from the original 2014-2016 version, taking advantage of updates from the 2016 census. Council's focus has changed slightly to take advantage of current opportunities and to help maximise development and prosperity in the district and region.

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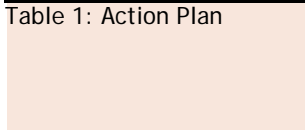
<sup>1</sup> Lambe, Will *Small Towns, Big Ideas* p.3.

<sup>2</sup> For discussion on the value of investing in infrastructure see Alicia Munnell 1990; Standard & Poors online report 2013: <http://www.infrastructureviews.com/2013/09/24/infrastructure-is-key-to-regional-economic-development-and-global-competitiveness/#sthash.TZ1dcoOD.dpuf>; ECONOMIC DEVELOPMENT AND INFRASTRUCTURE COMMITTEE July 2013 p.1-2

ACTION PLAN		
COUNCIL OBJECTIVE	KEY AIM	OUTCOME
Prosperous Community	A new focus on the region's premium food and wine to create opportunities for export and marketing opportunities	-Lift farm profitability through value adding opportunities for farm gate produce and better farm management by supporting the red meat cluster project
	Increased promotion of the NLC region through marketing	-Support of regional branding project and investment prospectus -Work with the region to promote the region's natural assets -Tourism development; increased business in retail and hospitality -Publish tourism development prospectus -Work with state and federal government to ensure understanding of opportunities and challenges of district and region
	Focus on improving key community facilities	-Library development, conferencing and public facilities
	Leverage the Naracoorte Caves to world class attraction	-Invest in the University of Adelaide partnership to build science tourism hub -Enhance town infrastructure with tourism focus with the Caves Connection Project
	Increase number of events, with proper promotion	-Promote growth in retail, hospitality
	Strive for enhanced engagement with business community through the NLBTA with RDA support	-Promote, educate, train local businesses in retail, tourism and electronic media to diversification and foster growth
	Enhance recreation in community such as community garden and market opportunities	-Vibrant sense of community, promote healthy eating and activities
Liveable Neighbourhoods	Protect and enhance open space in Naracoorte	-Promote sense of pride amongst community, increase use of public areas for all citizens
	Engagement of urban planning	-Enhance the look and feel of towns through improved signage
	Develop think tank to share ideas, thoughts and pitch to Council	-Enhanced sense of community, opportunities to network, promote community development on a public scale
Harmony and Culture	Improve town access and safety for those with impaired mobility and other disabilities	Safe community for all visitors and citizens, including the encouragement of retirees moving to the district
	Work with Limestone Coast region, including RDA and others regionally	Promotion of the district on an entire scale, increase tourism spend and brand recognition
Healthy Landscapes	Encourage the facilitation of further aged care development	-Encourage retirees to settle in the region, contributing to economic growth

	Sustainable and healthy agricultural practices and industry	-Productive industry that continues to service the whole region, including contributing to employment, retail and services
	Ensure safe and beautiful open parks, including walking and cycling trails for citizens and tourists	-Promote healthy living, including exercise, and attract and retain visitors to the region

Table 1: Action Plan



# BACKGROUND

## The Naracoorte Lucindale Council

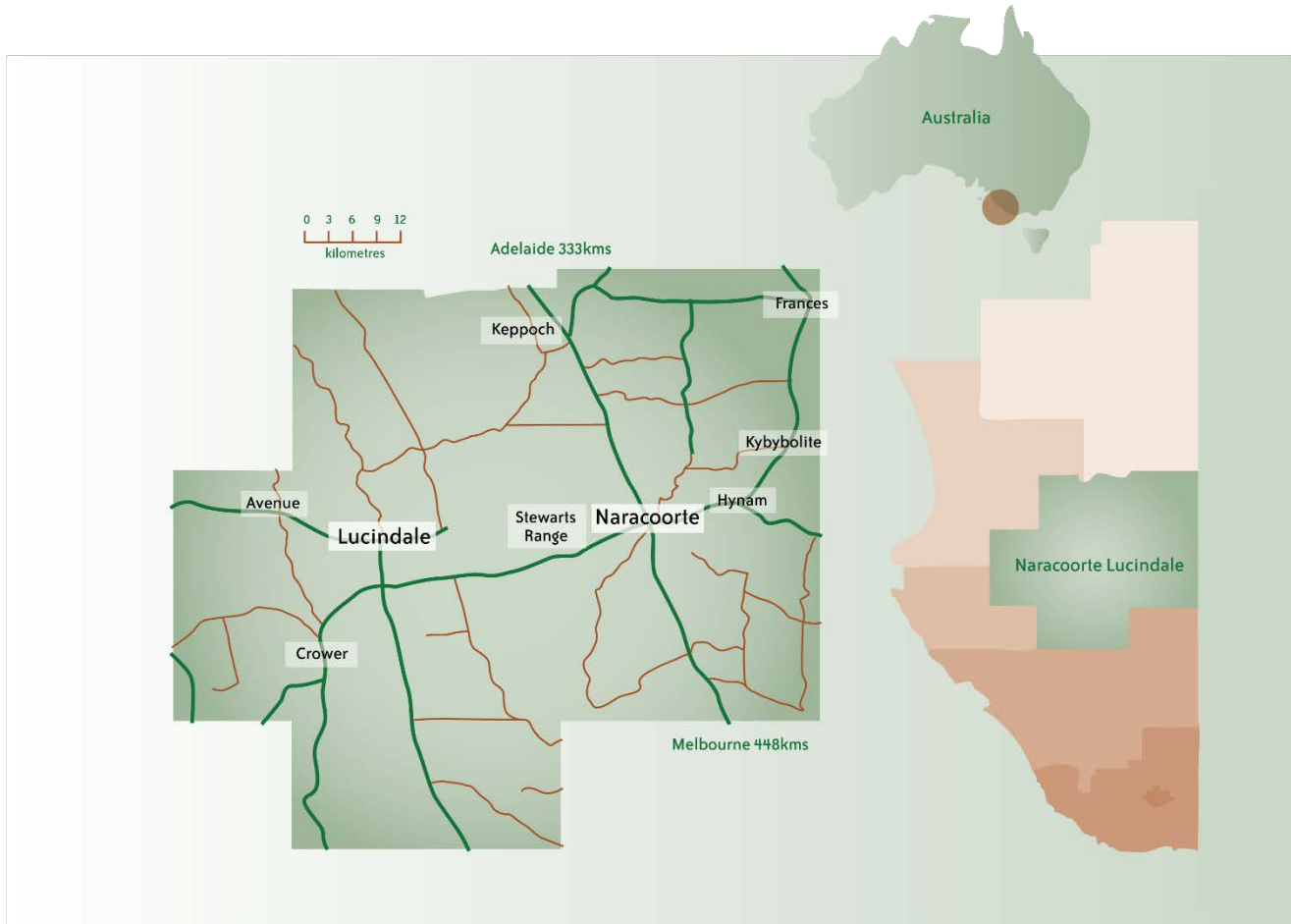


Figure 2 - Naracoorte Lucindale Map

### *Cultural & Historical background*

The Naracoorte Lucindale Council is approximately 300 kilometres from Adelaide and 450 kilometres from Melbourne. It encompasses an area of 4,520 square kilometres, sitting in the middle of the Limestone Coast region.

The district's main service centre, Naracoorte, is a regional hub offering a broad range of retail, commercial, community and health services and education facilities. The district also contains the smaller communities of Lucindale, Hynam, Kybybolite and Frances. Other local communities are Keppoch, The Gap, Cadgee, Binnun, Lochaber, Wild Dog Valley, Stewart Range, Hynam, Mount Light, Laurie Park, Moyhall, Koppamurra, Bool Lagoon, Struan, Joanna, Wrattontully, Spence, Woolumbool, Avenue Range, Coles, Conmurra and Fox.

The district is characterised by a mediterranean climate with a reliable rainfall. There are large tracts of prime agricultural land and accessible underground water. It is home to a thriving and vibrant rural economy; featuring beef and dairy cattle, sheep for both wool and meat, and cereal growing.



Two large enterprises; Teys Australia beef processor and Mini Jumbuk wool manufacturing centre value add to the primary produce with grain storage facilities supporting the cereal growing industry. Naracoorte Lucindale Council is central to some of Australia’s best wine producing areas with all of the Wrattobully and part of the Padthaway and Coonawarra wine regions within the district. It also is home to several successful small seed processors and distributors, as well as some horticultural production.

There is a strong tourism industry in the Council area supported by the Visitor Information Centre in Naracoorte. Natural features of international significance in the district are the World Heritage listed Naracoorte Caves and the Bool Lagoon Game Reserve and Hacks Lagoon Conservation Park. The principal town is Naracoorte with another four small towns spread across the district.

Country of Birth	Count	% of Overseas Born Population
Afghanistan	223	19.7%
England	176	15.6%
New Zealand	141	12.5%
Philippines	135	11.9%
Pakistan	45	4.0%
China	39	3.5%
Laos	31	2.7%
Thailand	31	2.7%
Scotland	30	2.7%
Vietnam	29	2.6%

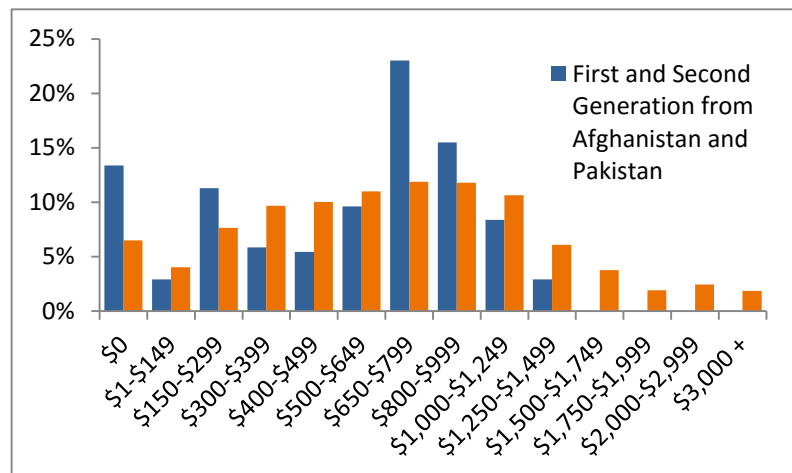
In 2016 the Council had approximately 8,291 residents with an average age of 40. The district population over the past ten years tends to fluctuate up or down by less than 1% but since 2011 it has grown by 2.2%. The township of Naracoorte has grown by 6.1% but the area outside has declined by 7%.

1.6% of the district’s population are indigenous and over 80% of the population was born in Australia. Of recent arrivals 31% Afghanistan, 20% Philippines, 11.1% New Zealand, 6.8% Pakistan and 4.2% China. Since 1966 migrants were coming from England and Europe, whereas today their birth countries are predominantly Asian.

The age profile of migrants is helping to counter the aging profile that dominates in Naracoorte as it does across the total

Australian population. Where most young people are exiting country areas to study and work in the cities, migrants are doing the opposite and thereby helping to fill what would otherwise be a severe labour shortage.

Migrants are also contributing in important ways to the overall prosperity of the community. ABS data indicates that the incomes among migrants is very much within the average income range for the broader community indicating how important the migrant community is for the general prosperity and growth of the township of Naracoorte and the broader district. These ABS statistic essentially indicate that without the migrant community having decided to make



Naracoorte their home then the sustainability of the town would be in jeopardy and, most likely, the town would be in decline eventually becoming unviable.

<i>Helpful Stats and Information</i>	
Population (Australian Bureau of Statistics total population 2016)	8,291
Area	4,520.1 km sq area
Length of constructed road network	1,614 km
Rateable properties (July 2017)	6,147
NLC's Total Rateable Capital Value (as at 17 June 2016)	\$2.097 billion
NLC's Total operating expenditure 2017-2018	\$17.5million
NLC's Total Capital expenditure 2017-2018	\$9.1 million
Development approvals 2017-2018	182
Total value of development approvals June 2017	\$16.0million
State Electorate	MacKillop
Federal Electorate	Barker

Table 2: Key Statistics and Information for the Naracoorte Lucindale Council district

Gross regional product for the district was \$484 million in 2002 and then from 2003 to 2007 it dipped to \$417 million, then rose over the following 8 years to \$549 million by 2016. Year on year for the last 16 years NLC has made up between 2.2% to 2.6% of the state gross product. Since 2012 it has remained relatively stable with incremental rises across all areas excluding tourism.

Employment has remained at stable levels with the unemployment level remain at 3.4% between 2006 and 2011. Over the past five years it has fluctuated between 3.4% and 4.8%. In 2011, over half the eligible workforce had no formal qualifications.

## Competitive Position

In June 2013 the Regional Australia Institute (RAI) launched its [In]Sight - Australia's Regional Competitiveness Index, essentially to address the gap in reliable and accessible information that was available to guide and inform policy and investment decision for regional Australia.

The approach and analysis is built on the approaches and experiences used internationally to assess competitiveness at a regional and national level. The opportunities that can be gained from [In]Sight is to understand the strengths and weakness of local government areas and regions and where Council can focus its investments to increase the prosperity of a region.

[In]Sight has been developed using ten themes (see Figure 3), three of which capture the outcomes commonly sought from regional development (blue), five of which capture the known drivers of growth from within regions (orange) and two aspects which are fixed but essential to understanding the competitive position of any region (purple).

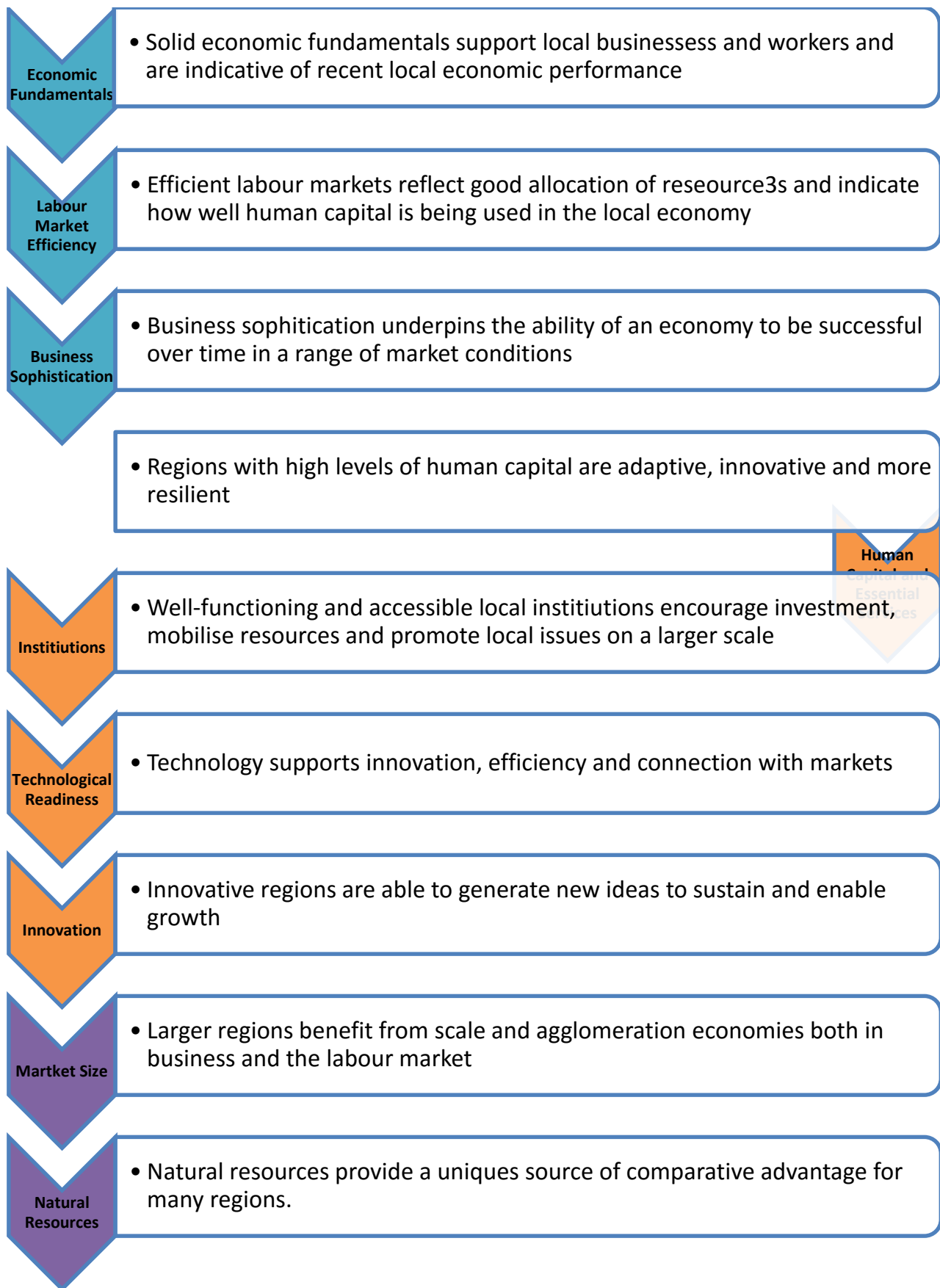


Figure 3. Ten Themes of Competitiveness/Insight/Regional Development Institute, Australia

Below, table 3 shows where the Naracoorte Lucindale Council sits in relation to the Nation's 563 Council districts across the eleven themes of competitiveness in Regional Australia Institute's [In]Sight tool. In 2015 there were 565 local councils. For a direct comparison, the competitiveness data for one of Naracoorte Lucindale Council's neighbouring Shires, West Wimmera, which is across the border in Victoria, is shown. This gives an indication of the variation of investment in, and policy approaches to the regions by the two states. The data for Regional Development Australia - Limestone Coast, which includes the Naracoorte Lucindale Council, indicates where the region sits in relation to Australia 60 RDA regions. In 2015 there were 55 RDA regions.

The rankings for all three areas from the original 2015 ranking exercise is also shown to track changes overtime. Tracking change is somewhat muddled because the Regional Australia Institute has made a number of changes to its data collection categories and increased the range of criteria that make up each category. In 2015 there were fifty six (56) criteria, there are now sixty nine (69) and one new theme. The change of the criteria has made some significant changes to the ranking which ordinarily one would not expect to see over such a short period of time. For example Business Sophistication included exports in 2015, in 2017 this has been removed significantly changing the ranking of NLC. Natural Resources include a category called Net Primary Productivity, in 2017 this has changed to Agriculture (people employed). The criteria changes suggest a more accurate picture of where communities sit on the Competitiveness spectrum.

Themes of Competitiveness	West Wimmera		Naracoorte Lucindale		Limestone Coast RDA	
	RANKINGS		RANKINGS		RANKINGS	
	2015	2017	2015	2017	2015	2017
Institutional Foundation	110	104	511	381	33	34
Infrastructure & Essential Services	399	329	399	389	42	42
Economic Fundamentals	530	246	371	329	5	18
Business Sophistication	391	495	149	360	34	38
Research & Development (prev. Innovation)	472	257	480	476	3	58
Natural Resources	403	36	301	180	1	1
Demography (prev. Market Size)	355	557	256	346	40	50
Human Capital	180	267	402	213	44	44
Labour Market Efficiency	60	37	81	97	17	18
Technological Readiness	452	444	280	310	46	45
Business Dynamo (New in 2017)	0	360	0	253	0	52

Table 3: Comparison of the Competitiveness of the district ranked against 563 Councils (first & middle columns) & 60 Regional Development Australia Regions (end columns)

More detail of each of the [In]Sight *Ten Themes of Competitiveness* is shown in Appendix 1 and discussed in the later sections of the Plan. What the data shows is that our regional market is not driven or dependent upon the government sector. One can conclude that there has been a lack of interest by both the State and Federal Government in the value of the region. This is surprising when the region comes at the top of the RDA ranking for natural resources, suggesting there is a opportunity for significant growth across a number of sectors. Ranking in the top 5% of Economic

Fundamentals and Innovation across the 55 RDA regions confirms that something positive has been going on in the region despite the lack of attention from the State and Federal Government.

The detailed information behind each of the themes shows the constraints on economic growth within the Naracoorte Lucindale Council area. This is primarily in the area of Human Capital where there are more challenges in accessing (and therefore the participation rates are corresponding low) tertiary education and the poor performance at the early childhood level. The district is also challenged because of the low levels of research and development and low numbers of people with post-tertiary qualifications. This can be a self-perpetuating issue because if there is little pressure on youth to get tertiary qualifications to gain employment then it can be difficult to develop a culture that creates an ongoing drive to undertake tertiary education before looking for employment. Additional issues, such as the cost of degrees and associated living costs that are incurred in the process are also inhibitors to youth choosing to go away for tertiary education.

Other areas that will continue to be challenges for us moving into the future is around technology and infrastructure. To participate fully in the national and global economy, fast and reliable communication networks are necessary, and the provision of publically available free networks / wifi.

## UNDERSTANDING THE ECONOMY

### THE GLOBAL CONTEXT

In 2012 the CSIRO released an updated report of the megatrends<sup>3</sup> that will impact our future. It is worthwhile to understand what these are as the indicative time frame for a megatrend is the same duration as that of Council's Strategic Plan. Some of the trends already underpin some of the directions that Council is and needs to move in. The six inter-related trends are described in an extract taken from the CSIRO report.

1. **More from Less:** The earth has *limited supplies* of natural mineral, energy, water and food resources essential for human survival and maintaining lifestyles. Data are revealing many of these resources are being depleted at often alarming rates. At the same time population growth and economic growth are placing upward pressure on demand. The more from less megatrend explores how companies, governments and communities will discover new ways of ensuring quality of life for current and future generations within the confines of the natural world's limited resources. Science, technology, business processes, government policy, lifestyle patterns and cultural norms will all play a role.
2. **Going, going, gone?** Many of the world's natural habitats, plant species and animal species are in decline or at *risk of extinction*. The actions taken by human beings in the coming decades will set the scene for global biodiversity over coming millennia. The going, going ...gone? Megatrend explores the perilous situation of the world's ecological habitats and biodiversity. This megatrend also captures the issue of greenhouse gas emissions and climate change. Much in the natural world, that humans value and depend upon, is at risk of being lost forever. However, there is a positive story and a potentially bright future. The megatrend is purposefully posed as a question. Whilst the state of biodiversity is in decline and the pressure is rising so too is the human response.

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<sup>3</sup> A megatrend is a significant shift in environmental, economic and social conditions that will play out over the coming decades. The indicative timeframe for the analysis is 20 years. CSIRO, *Our Future World*

3. **Silk Highway:** Coming decades will see the world economy shift from west to east and north to south. Rapid income *growth in Asia* and, to a lesser extent, South America and Africa will see billions of people transition out of poverty and into the middle income classes. The powerhouses of the new world economy are China and India. This economic shift will build new export markets, trade relations, business models and cultural ties for Australia. Tourists, funds and ideas will increasingly flow out of Asian countries and into Australia's economy and society. We are stepping into the Asian Century.
4. **Forever young:** The *ageing population* is an asset. Australia and many other countries that make up the Organisation for Economic Cooperation and Development (OECD) have an ageing population. Elderly citizens provide a wealth of skills, knowledge, wisdom and mentorship. Nevertheless, there are some challenges associated with an ageing population and associated demographic trends. Two of these challenges include Australia's widening retirement savings gap and rapidly escalating healthcare expenditure. This will change people's lifestyles, the services they demand and the structure and function of the labour market.
5. **Virtually here:** This megatrend explores what might happen in a world of increased connectivity where individuals, communities, governments and businesses are immersed into the virtual world to a much greater extent than ever before. We are increasingly moving online to connect, to deliver and access services, to obtain information and to perform transactions such as shopping and working. Online retail and teleworking in Australia are forecast to grow rapidly with impacts on labour markets, retail models, and city design and transportation systems. Digital media is allowing people to form new connections and selectively access information through multiple channels with subsequent erosion of trust in traditional information sources. The digitally connected world is virtually here.
6. **Great expectations:** This is a consumer, societal, demographic and cultural megatrend. It explores the *rising demand for experiences* over products and the rising importance of social relationships. This megatrend also captures the expectation people have for personalised services that meet their unique needs and wants whilst being delivered *en masse*. This megatrend has implications for the Australian retail sector and human service delivery systems of government and private sector organisations. People of the future will have expectations for more personalised, better and faster services. They will seek higher-end experiences due to income growth and the oversupply of mass consumables. Social relationships will hold increased importance given the potential for social media and digital communication burnout and the desire for face-to-face interaction. Conversely, for the billions of impoverished people in the world the expectations are still for the basic necessities of life such as water, food, clothing, shelter and personal security. Many will have great expectations, but many will still have basic expectations.

## THE LOCAL CONTEXT

There are several features of the Naracoorte Lucindale Council area that predispose it towards ongoing growth and development. The district's location, natural environment, food and wine offer great building blocks for ongoing agricultural growth and development of a vibrant tourism sector. Over the past three years the Regional Collaborative project has developed the Limestone Coast Brand and tag line "Unearth our treasures" which businesses in the region can use in promotional materials, as well as creating a focus for marketing tourism for the region.

### Tourism

The Naracoorte Caves National Park is South Australia's only World Heritage Site and preserves Australia's most complete marsupial fossil record for the past 500,000 years. The world heritage caves is the region's main tourist attraction. Visitors also tend to spend time at Naracoorte's swimming lake, and stay at the nearby caravan park which provides an ideal family holiday option with many families returning annually. There has been an increasing number of 'grey nomads' and the town has been used as stop-off points for touring car and other clubs. Visitors also benefit from the town's services and other attractions such as the Sheep's Back Museum, Bool Lagoon Game Reserve and Hacks Lagoon Conservation Park. These natural areas are recognised under the Ramsar Convention on wetlands as a Wetland of International Significance.

The Council area hosts the following major annual events, which are also tourism drivers: Taste the Limestone Coast Festival (February), Frances Folk Gathering (February), the South East Field Days (March) and the Naracoorte Swap Meet (May).

*Opportunities still exist for the tourist that is focused on outdoor experiences coupled with a high quality eating experience and accommodation options to cater for the more high end traveller, including the promotion of the area's premium local food and wine. Opportunities also exist for attracting more events with high calibre promotion and marketing.*

### Agriculture

The district is a prime agricultural area with livestock production, cropping and small seeds, viticulture and some horticulture. It is expected there will continue to be consolidation of properties with a slow decline in the number of families living on-farm. Productivity is likely to increase and contract services will be required although it is anticipated that there will continue to be ongoing mechanisation and efficiency improvement in the sector. Naracoorte will continue to host a range of agri-support businesses servicing an area considerably larger than the district. These agri businesses along with the health services, supermarkets and other retail options available in Naracoorte enable it to draw a customer/client base that is considerably larger than the district population.

*Opportunities to support agriculture further by encouraging better strategic and business management on farm. The district's premium food and wine create opportunities for export and marketing to destinations in high need of our clean green product.*

*Consider becoming a focal centre for new technology in farming - digital, robotics etc. Is this a viable option?*

## Viticulture

The district supports three wine regions; parts of the Wrattenbully, Padthaway and a small part of Coonawarra, but also many vineyards in other areas of the Naracoorte Lucindale Council. The high labour required for vineyard work brings in many backpackers and migrant workers. Wrattenbully had a growth of vineyards developed from 1994 to 1998, with almost 50 grapegrowers, and close to 20 wine producers in the district. Vineyards are starting to mature with promise of unique characteristics of the Wrattenbully fruit. There is just one cellar door in the district, but it does not open on weekends. Most of the local hotels stock local wine, and more of this should be encouraged.

*Opportunities exist for promotion of the relatively young wine region, encouraging wineries to open cellar doors to attract and retain Naracoorte Cave tourists to the district. There is an opportunity to support the establishment of one central cellar door that promotes all vineyards, wineries and to 'tell the story' of the Wrattenbully geographical indicator. A project the Wrattenbully Wine Association has commenced and which council has supported through its business entrepreneur and innovations grant programme*

## Meat Processing

Teys Australia, beef processor, produces some of Australia's most consistent quality beef, and employes 400 people. The plant can process up to 735 head per day, producing products that are sold both into the domestic and export markets; this is supported to some degree by the local livestock exchange although a significant portion of the volume of sales through the exchange are for restocking purposes.

*Continue to support the Red Meat Cluster project so that there are initiatives in the livestock sector that can add value across the whole value chain. Export of small seeds and technology in agriculture.*

## Wool manufacturing

Historically the Limestone Coast region was a substantive wool producer, with Naracoorte as a hub for distribution and brokering. More recently the move has been to prime lamb rather than wool production but the recent recovery of the woolprice may herald a change. The district hosts a manufacturer of luxury woollen bedding products. Mini Jumbuk was built off the sheep's back, and is expanding its production to meet export opportunities. Mini Jumbuk is a large retail business with its manufacturing plant based in the heart of the town.

*Majority of Mini Jumbuk's sales are for export, and opportunities exist for leveraging off Mini Jumbuk's premium brand and establishing Naracoorte on the international map. Opportunities here with tourism as well as other producer of premium products from the region. Manufacturing opportunities based around key commodities produced in the region - wine exists but may be opportunities for things like gluten free barely and premium broadbeans for the asian snack market?*



## Naracoorte Regional Livestock Exchange

Upgrades, ongoing improvements in services and competitive prices has made the Naracoorte Regional Livestock Exchange (NRLE) attractive to sellers and buyers, as one of the State's best facilities. The ten year average is approximately 100,000 cattle and 500,000 sheep and lambs per year. The economic multiplier impact of the NRLE for the district is estimated to be vast. Strategic investment and effective management will ensure the exchange remains competitive across the district, region and state.

*It is important that the Regional Livestock Exchange keep its focus on animal welfare and worker health and safety to maintain the Exchange's good reputation attracting large numbers of stock buyers, sellers and producers entering the town twice a week. The immediate need is for cattle pens to be upgraded and identifying opportunities to lower the cost of waste water treatment. Identify opportunities for higher utilisation of the facilities. There is an opportunity to continue to investigate cost effective treatments of organic and animal waste from NRLE and elsewhere. Investigate leveraging the use of the waste to establish more intensive horticultural activities if suitable water is available.*

## Retail

Naracoorte is an attractive shopping destination because it has a range of supermarkets, specialty food shops, cafes and restaurants, and other retail shops. A range of agriculture based business support services are also available, assisting the town's agricultural based customers. Food outlets are generally closed on Sundays, meaning tourists and locals are unable to be serviced. T

he current economic and changing media and purchasing environment continues to make it difficult for some specialty shops to keep open, unless they offer a unique range of goods or have an outstanding level of customer service that enables them to remain competitive.

*Building the tourism sector will help to deliver benefits to the retail sector with a greater number of people with the time and inclination to spend time looking and the interest to find gifts and momentos to take home. Opportunity to lead in customer service so Naracoorte retail is the preferred centre for shopping, both discretionary and farm support. Awareness of what they can provide to locals and visitors; good customer service, ability to sight product before purchase. Also, support local retail outlets to understand the threat of internet shopping and other retail challenges.*

## Government Services

The district hosts depots/offices for DEWNR, DPTI and PIRSA, although these services and employee numbers have declined over the past five years. This trend is likely to continue as the SA State government reins in its expenditure and reduces staff numbers. It may also open up new opportunities for local government to come together and provide services that were traditionally provided by the state government. For example the recently established Glenelg Trust has become active in the preservation of the region's environmental heritage.

# ECONOMIC GROWTH – DRIVERS

Key challenges facing the district have directly impacted the agriculture sector with flow-on impacts to retail businesses and agricultural services sector which are not easily influenced by local governments. However there are factors that local government can influence that could bring economic growth to the district. These include investing and encouraging investment in areas that have typically not been a focus of the district.

Capitalising on the natural assets of the district, prosperous community, and resilient people will allow the district to build a strong future together, with a focus on:

- Energy and Manufacturing
- Technology and Connectivity - NBN & University optic fibre cable pass via Naracoorte
- Learning and Development
- Agriculture - value adding
- Retirement and Aged Care
- Tourism
- Retail

Migrants have played an important role in the development of Naracoorte Lucindale district for many decades. They make an important contribution to the seven areas listed above. Council needs to give consideration to the steps it can take to encourage this group to stay and help the district grow. In the current political climate it is likely to be in the form of lobbying state and federal representatives to ensure they fully appreciate the key role migrants play in the regions and the Naracoorte Lucindale district in particular.

## *Actions to encourage migrants to move to and stay in the district*

- Lobbying State and Federal representatives so they understand the critical role migrants have in the district's economy.

## Energy / Manufacturing

Naracoorte Lucindale Council needs to work more closely to support all business, but particularly manufacturing as this sector has the greatest capacity to grow the prosperity of the district. Leverage off the region's investment into researching forestry manufacturing options is possible. In addition, wind energy has potential in the area. One company is currently doing feasibility on the establishment of a wind farm in the district but there are limits with the ability of any energy generator to feed into the grid and there are ongoing discussion around the opportunity for bio-mass energy production. There are two major economic drivers in the district, Teys Australia meat processor and Mini Jumbuk. Council is looking at opportunities for the processing of its organic waste streams to fertilisers. What opportunities are there for increase reuse of existing waste streams in the district or region. There are also opportunities for solar energy production to minimise the risk of downtime during power outages. This is likely to increase with the decommissioning of Victorian and South Australian coal power plants.

Effort must be demonstrated in creating an environment for growth, especially given current demands for agriculture products. The Council will need to continue to support innovation, expansion and growth of employment opportunities. It also needs to work at the regional level to encourage the State government to address the cost of energy, which is the number one challenge to manufacturing and processing sectors.

### *Actions to develop and support the growth of manufacturing in the district*

- Focus needs to be on creating a culture of innovation and continuous improvement
- Continue to facilitate an inventory of what manufacturing potential exists within local businesses
- Provide ability for local manufacturers and other businesses to learn through workshops and guest speakers
- Create opportunities for professional development in areas of business management and product development.
- Gain an understanding of what common business models exist and are successful in the region (eg, high input costs to start locally, employment potential, value adding)
- Facilitate industrial B-double vehicle access to the town to appropriately zoned land to encourage ease of growth in the agricultural and manufacturing sectors

## **Technology and Connectivity**

Naracoorte has benefited relatively early in the roll out of the NBN fibre optic cable and other NBN technologies. The town of Naracoorte has fibre from both NBN and from the University cable that traverses the same route to UniSA in Mount Gambier. In addition, there are several towers in the district that enable families and businesses to have improved connectivity. Those on-farm have the opportunity of connecting via satellite which to date has not been an overwhelmingly positive experience but once the second satellite is online there is hope that this will improve. Lobbying of state and federal governments may be required if it becomes apparent that farm productivity is being seriously impaired because of poor connectivity.

In addition to the NBN cable there is the university cable which can be accessed by other learning institutions, hospitals etc. This is an opportunity that should be further investigated by the Department of Education, the hospital and medical practices. It has the potential to be a great resource for the Naracoorte Community Centre (Public Library) as well.

## **Service Sector - Learning & Development**

The Naracoorte Lucindale district is serviced by three primary schools in Naracoorte, a primary school in Frances, a highschool in Naracoorte, and a Reception to Year 12 school in Lucindale. Aside from those students that go to boarding school there are several busloads of secondary level students travel on a daily basis to independent schools in Mount Gambier. There is an opportunity to stem the tied of students going to independent secondary schools in Mount Gambier and for Naracoorte to expand its independent school (currently at the primary school level) to include secondary level students.

There are limited opportunities to further education, although there are some TAFE offerings and several private, local training providers. Most students wanting to participate in further education

travel to Adelaide, Melbourne, or Hamilton. Naracoorte is home to Limestone Coast Training, which is focused on delivering accredited short courses and industry certificates.

Both TAFE SA and University of SA have a sizeable presence in Mount Gambier, although TAFE SA has changed its delivery model to be less focused on its buildings to a more user based model. In addition, there are a range of other private providers who deliver a number of certificate programs. Education, as well as networking and collaboration is an essential part of growing a community's vibrancy. Some organisations exist, but promotion of more should be encouraged.

With the arrival of the NBN and the earlier installation of the University fibre optic cable, there should be greater opportunity and easier access to online learning for both school children and those engaged in tertiary education. The ARC Linkage Project on Naracoorte Caves with the University of Adelaide is an opportunity to generate greater interest in science and technology learning.

An upgraded community resource centre (library) will provide an opportunity to extend the informal learning opportunities to a range of ages such as the Little Bang Discovery, computing for Seniors, author events, exam supervision, and general internet access.

### *Actions to further education and development in the district*

- Ensure library is a civil learning centre where students and young adults can access information about furthering education, local providers that can take on apprentices. This facility would also allow access to Massive Open Online Courses (MOOCs) and sit for exams and advanced qualifications without leaving the district
- Strive for the delivery of high quality secondary and advanced education within the district and region
- Encourage employers to offer professional development opportunities to young employees, such as gaining certificates
- Facilitate ways that experienced professionals can convene to discuss and propose ideas to Council, such as a think tank forum once a year
- Support and acknowledge volunteer groups
- Lobby for high speed internet connection for learning and business available in the region
- Educate citizens on the increasing trend of moving to a virtual world, to ensure they stay connected and efficient with business systems and lifestyle choices
- Encourage citizens to get involved in social service to ensure those suffering in the community are not being forgotten. Efforts to support not for profit community organisations would be a benefit to many

### **Agriculture - value adding**

Opportunities exist for agricultural value adding in the district which will not only satisfy tourists and visitors, but also help with developing the economy and marketing of the region.

### *Actions to encourage agricultural value adding in the district*

- Encourage the development of wineries to open cellar doors, or one central cellar door to promote the whole Wrattenbully region
- Continue to support the Red Meat Cluster to develop programmes to increase farm productivity.
- Assist specialist boutique food products and small business to access new markets including foreign markets (with help from Austrade, RDA, DMITRE etc)
- Play a role in facilitating/coordinating producer initiatives at a regional level - development of committees and networking to brainstorm ideas
- Enhancement of NRLE - especially in the way of promotion Australia wide to attract stock and buyers
- Leverage off the clean and green image the district portrays to international markets - encourage niche markets and organic production
- Enable small produce business to grow, without introduction of major competitors (eg, price-driven supermarkets, chains)
- Create a medium for backyard growers to share homegrown produce, in turn enhancing a sense of community and promoting healthy eating
- Ensure roads are satisfactory for large vehicles in peak busy times such as harvest and vintage
- Promote the use of the Limestone Coast brand
- Encourage business to be active on social media to raise the profile of their business, the district and the region.

### **Retirees and Aged Care**

The changing demographic of the nation and the ageing profile of the population, the township of Naracoorte has increasingly become an attractive location for people to retire. The district is serviced by a hospital, medical centre and a number of allied health services such as physiotherapy and podiatry. The town also has a range of services, sporting and social clubs as well as retail and other services making it relatively easy to live. It is also small enough to generate a strong sense of community as well as being a safe place.

### *Actions to increase the attraction of the town to retirees*

- Continue to support Longridge Aged Care and the in-home care service providers including the expanded opportunities under the NDIS.
- Drive development of the look and feel of Naracoorte as a town that is attractive to retirees
- Library upgraded along with a more community centre feel
- Trucks to move out of main street to make it feel safer and be more amenable to outdoor café style town centre
- Recreation activities and retail services available 7 days a week
- Market Naracoorte and district as being an ideal place to retire

### **Science Tourism**

Tourism provides greatest opportunity for the local economy, and the district should not miss out on the prosperity this industry could bring.

Regardless of the validity of the \$12.3 million decline, there has been nine cafes/restaurants, etc. close their doors, but there are three that have opened/process of opening, during the same period.

Despite the loss of tourism income in NLC, over the past few years the Limestone Coast region has experienced a growing number of overseas tourists. These are mostly from Europe, although there is clearly an increase in visitor numbers from China. This is currently being driven by families visiting their children who are studying in Australia.

Naracoorte is in the centre of a very popular touring route from Melbourne to Adelaide; Great Ocean Road, Coonawarra, Coorong, McLaren Vale, Kangaroo Island, Adelaide and Barossa. It is vital to draw these visitors to our district, and encourage them to stay for more than the Naracoorte Caves. The Caves are a pivotal point of interest for tourists, and opportunities exist to capitalise on the food, wine and nature experiences already existing. Maximum economic benefit for the district will come from high end tourism, which services to cater for this market are almost non-existent in Naracoorte. In addition, investment and effort can go into improvement to a range of infrastructure and partnerships opportunities that leverage off the World Heritage status of the Naracoorte fossil site. Regardless of these local government generated opportunities, the existing business sector has to decide if it wants to be a serious player in the food and hospitality sector before any opportunities from tourism can be realised.

Over the past year, council have invested in leveraging the opportunity that comes with having a World Heritage site in the district. It has sought input from the broad community and DEWNR for investment to build the tourism sector. Creating a ten year investment program for council to implement. Council has also signed a partnership with the University of Adelaide to help fund a research project around the World Heritage fossil site, and develop a science tourism focus. NLC, in partnership with Robe Council, is working on a sister city relationship with the Chinese city of Tai'an who also has a World Heritage listed site, in the hope to encourage more Chinese tourist to the district and region.

### *Actions to increase the attraction of the district as a tourist and event destination*

- Improve signage with vibrancy and creativity to make it easier and more interesting to find the Naracoorte Caves and facilities around town
- Support LCLGA and others in the education of tourism providers (LCtraining? TAFESA?)
- Marketing campaign; including investment in digital promotions (social media). Focus on prime location
- Help promote Lucindale Lions South East Field Day site for events
- Encourage local businesses to investigate opening a high end restaurant and high end accommodation
- Enable the development of tourism entrepreneurs to emerge in the district - tours, agri-business opportunities
- Create an 'App for Naracoorte' to bring in tourism numbers, plus assist with finding services
- Promote the district's fantastic experiences on an Australia wide scale - Art Gallery, Sheepsback Museum, Naracoorte Caves, Bool Lagoon, Cockatoo Lake
- Work closely with DEWNR to encourage investment in upgrade of Naracoorte Caves - including upgrade, re-vamp of accommodation facilities
- Plant trees and native vegetation to ensure the district is welcoming and supports ecological habitats and biodiversity for local fauna and flora
- Lobby for the train line to be re-opened for tourism and freight
- Promote events vigorously; within in the district and State/Australia wide (social media, signage, newspapers, TV and radio)
- Support and enhance Visitor Information Centre
- Work regionally to ensure comprehensive range of visitor experiences
- Work with DEWNR to enhance the World Heritage site and provide a better tourist experience.
- Work with University of Adelaide and South Australian Museum to provide science/history learning opportunities for general public;
- Develop proposal for Megafauna Fossil Museum to accommodate fossils.
- Develop proposal for bike/walking trail to Caves from town centre, linked to creek walk out to McMillan Road. Last phase would be to link Caves with a bike trail through to Coonawarra, and Naracoorte to Kingston along the old rail corridor
- Encourage the development of highend accommodation and tour providers
- Encourage greater utilisation of the Limestone Coast brand and for operators to use social media to boost the profile of their businesses and the district
- Encourage tourism providers to be bookable online and listed on the ATDW

### **Retail**

Success of small business on a collective level is vital to the prosperity of the district. Without local shops and service providers, interest and activity in the central business district area will be

lost. The retail sector is one of the areas that is most challenged. Service providers are readily taking up vacated retail space. Retail outlets are critical for the ongoing generation a successful tourism sector.

*Actions to develop and support the retail industry in the district*

- Support local businesses to access grants (provide a free service for grant writing and advice)
- Business and Tourism Association increase role in promoting local business within the town and also within the Limestone Coast
- Business and Tourism Association should provide professional development training to local businesses on the following topics: social media, threat of online business, reinventing their product, customer service, and efficiencies (understanding your consumer)
- Encourage property owners with empty spaces in the retail precinct to support the establishment of new businesses - refer to Vibrant City project by Renewal SA
- Capitalise on the 'shop local' campaign by educating shop owners how to foster growth and how to keep the local customer satisfied and returning to buy their product
- Explore an opportunity to encourage cafes to open on Sunday; perhaps on a roster system and support outside dining (footpaths, public spaces etc)
- Business and Tourism Association could encourage shop owners to stay open on public holidays to attract and satisfy tourists, and locals. For example, Mother's Day (Sunday), ANZAC day, June long weekend etc
- Educate business leaders on the power of online review platforms, such as TripAdvisor; Advise local attractions and businesses to list on the free website to attract more visitors, and encourage businesses to respond to negative comments and feedback
- encourage operators to use social media to boost the profile of their businesses and the district, and hospitality and service business to list on the ATDW



# ECONOMIC GROWTH - CHALLENGES

The district is not unlike any other districts in the Limestone Coast in terms of being confronted by inhibitors to economic growth, such as the difficulty of competing on an international scale for products, the high Australian standard of living (i.e. cost of labour), high power prices or a high Australian dollar. However there are some specific areas that can be considered in order to build resilience against these challenges and the changes in the global context:

## Education Levels and Opportunities

As indicated earlier a major inhibitor to the competitiveness of the district are the relatively low level of post secondary education. This is compounded by the difficulty in accessing educational opportunities. To undertake any trade or university qualification the nearest institutions regionally are located in Mount Gambier. The options available at both the TAFE and UniSA are limited. University qualifications like engineering, law, and medicine require moving out of the region to a capital city or large regional city in one of the eastern states. However, more and more universities are looking at alternative learning experiences for students. For example, Adelaide University has become a member of the International edX Group, an international consortium which is driving new direction in education delivery using the latest technologies and targeted content. To this end they are developing several Massive Open Online Courses (MOOCs).

### *Actions to raise education levels in the district*

- Continue to work with all schools to ensure they have a positive reputation and an excellent student record.
- Work with region through LCLGA's sub-committee, the Economic Development Group, to expand tertiary offerings to keep students in the region
- Take advantage to link into the university fibre optic cable that is currently being installed in the region. This is an invaluable link for all educational activities in Naracoorte.
- Understand the opportunities available for advanced educational opportunities that are available within the region and online including MOOC
- Approach existing independent secondary schools in the region with a proposal to establish Naracoorte campus.
- The redevelopment of the Community Resource Centre / Library ensures the provision of IT to support online / external learning and places to study with good connectivity

## Research and Development

Very little research and development is undertaken in the district let alone the region. There is sporadic paleontology work that is undertaken locally at the Naracoorte Caves as part of the courses offered by Flinders University of SA and some broader scientific investigation that is proposed by the University of Adelaide. From time to time there is research done on the Bentwing Bats that live in the Bat Cave.

Historically there was significant agricultural research undertaken by PIRSA at several locations near Naracoorte (Struan and Kybylote), but this has all but ceased. Aside from remaining

research undertaken at Struan by SARDI the only agricultural based research is undertaken by the MacKillop Farm Management Group. No other formal research takes place in the region. This added to the low levels of post secondary education does create an optimal environment to drive a culture of learning and research and development.

### *Actions to increase research and development in the district*

- Continue to work with region through LCLGA's sub-committee, the Economic Development Group, to build the research and development capacity for key regional industries.
- Take advantage to link into the university fibre optic cable being installed.
- Support research undertaken in the region by the University of Adelaide, Limestone Coast Red Meat Cluster, MFMG, Lucerne Australia and other organisations.

## Infrastructure

There continues to be infrastructure limitations within the district. Much of this relates to adequate roads to carry increasing numbers of road freight and access for B-Double trucks to a range of locations around the district but particularly in Naracoorte. For example, access to Teys Meatworks and the Naracoorte Livestock Regional Exchange remain a challenge. Currently trucks travelling from a westerly direction have to go down the mainstreet of Naracoorte which has proven to be disrupting to retailers, tourists and locals.

Delapidated bridges over SE Drains network require urgent maintenance and investment. The drains and roads are an essential part of the district and region's economic infrastructure. Load limits on bridges are creating increasing challenges to the movement of freight and farm machinery around the district.

### *Actions to improve infrastructure of the district*

- Continue to work through the LCLGA Economic Development Group to complete the Regional Infrastructure Plan and to get funding for major freight and tourist transport routes.
- Investigate the beneficial impacts of council supporting the installation of infrastructure that facilitates transport movement across the district and in Naracoorte, including the installation of bypass routes
- Take advantage to link into the university fibre optic cable and NBN.
- Understand the opportunities available for advanced educational opportunities that are available online including MOOC NBN can help kickstart this
- Work with LCLGA and SENRM Board to address delapidated SE Drains infrastructure

## Communications technologies

Whilst the National Broadband Network is currently being installed in the district. This will help address network connections for businesses and household in urban areas. Until the second

satellite is launched, and hopefully not oversubscribed, there will be ongoing challenges with connectivity, access to the internet and network black-spots for the farming community that should be maximising their investment in machinery, much of which can now track and collect enormous amounts of information to help farmers be more productive.

In addition, the region still suffers from mobile phone black-spots, which need to be addressed by telecommunication providers but which is hampered by costs. The Federal Government has put programs in place to address this issue and the district has had limited success.

#### *Actions to improve Communication Technologies available in the district*

- Work with the NBN to help facilitate the move by users to access to these additional options.
- Where possible work with Federal and State Governments to address mobile phone black spots.
- Understand the opportunities that may be available with the university fibre optic cable and NBN.

### Climate Change and Future demands

Movement into the region is likely to increase as climate change impacts increase and existing agricultural areas become marginal. It may also be driven by changes to State Policy if it moves to encourage growth outside of Adelaide and into the regions. At the outside there could be growth in manufacturing that would drive population growth.

Any future growth in areas identified in the report will put demands on existing infrastructure, water, communication systems, health care and education services. The Council will be required to encourage the community to implement efficient systems and abilities to gain more from less, in terms of minimising waste in business practices and lifestyle patterns.

#### *Actions to understand the impacts of Climate Change on the district*

- Work with the LCLGA, RDA-LC, SENRM and ZONE Committee to ensure there is a comprehensive understanding and management of the risks and impacts of climate changes within the region.
- Work regionally re development of policy to protect the resources of the region from unsustainable exploitation. Eg. Water Allocation Plans that cover the region.
- Work regionally through LCLGA to lobby State and Federal governments

### Coordination and Partnering

Ongoing effort will be required to ensure local government and business work together efficiently and effectively to ensure objectives are met. The council will also need to continue partnering at a regional level to deliver service efficiencies and to influence and effect funding outcomes from both and State and Federal Government.

### *Actions to increase coordination and partnering in the region*

- Work through LCLGA and its sub-committees, RDA-LC to cooperate in the delivery of council services and attract funding and development opportunities to the region.

## *Community Drive*

Given there are key capital areas that are missing in the district growth will be challenging. Fundamental to overcoming these challenges is a willingness to work as a cohesive community and the sheer drive to achieve, regardless of what it takes.

## *Regional Support and Partnerships*

### *Local Government*

LCLGA - role in economic development - central now to role of local governments with support from State's representative body and a close relationship with the Minister for Local Government and Regions. In its close partnership with the State Government support for international trade delegations both incoming and outgoing have key aspect for driving inward investment and identifying export opportunities for regional South Australia.

Council needs to be open to cross boundary collaboration with other councils. This gives us the capacity to have access to opportunities that we do not have if we operate as isolated entities. For example, council might consider that it would be in the district's interest to invest in tourism or event management and partner with a neighbouring council to share in the employment of a suitably skilled person.

### *Regional Development Australia - Limestone Coast*

Since the first version of this plan there has been some fundamental changes with the focus of the RDA - Limestone Coast. Rather than having an agreement with the Limestone Coast Local Government Association the move has been to work with each council under a separate agreement and thereby address the specific needs of each. The content of this agreement with this council has yet to be developed but it may be an opportunity to focus on support to develop a tourism industry. There will be an ongoing need for support with regional development grant applications for key infrastructure such as the replacement or upgrading of key public infrastructure such as the Library, basketball stadium. This council is likely to need support for small businesses as it currently has no professional economic development personnel on staff. The role of the RDA LC is very strategic so it will pursue projects that are understood to be key drivers for the region. These are likely to include things like access to adequate energy to grow existing manufacturing or the provision of air-freight.

# CONCLUSIONS

When regional local governments consider how it helps to build prosperity and encourage economic development then it needs to take a broader view of the strategies that it can employ. Community development strategies are a fundamental aspect of driving economic development.<sup>4</sup> Community development usually includes short-range and long-range strategies, and often is a transformative process.

An example of development that has had positive impacts include the redevelopment of the Tatiara civic centre located in Bordertown which has meant they are more attractive for hosting events than they have in the past.

Examples locally that have provided positive economic benefits to the district has been the community initiated and managed installation of the Naracoorte Swimming lake, then handed it over to Council to manage. Another example is the CT Scan fund raising initiative. Again, community initiated and managed, without direct local government involvement, but which will have positive economic benefits because it will increase the attractiveness of the town of Naracoorte as well as drawing people from outside of the district into the town for appointments. Understanding the future of the livestock industry and careful investment has enhanced the attractiveness of the Naracoorte Regional Livestock Exchange to a wide range of buyers and sellers thereby bring more people into the district to participate in commercial activities.

Research in the United States has shown that dramatic outcomes occur in proactive and future-oriented communities that are prepared to embrace change and assume risk. But they also require to have:

- a shared vision of the future;
- identified assets and opportunities to understand and capitalize on competitive advantages.
- innovative local governance, partnerships and organizations can enhance the capacity for development.
- identify, measure and celebrate short-term successes to sustain support for long-term development.
- a comprehensive package of strategies and tools to use, rather than a piecemeal approach.<sup>5</sup>

None of these can be achieved or maintained without there being open and transparent communications between the local council and the broader community. The vision that is being strived for and how it will be achieved needs to be spelt out in strategic plans, they need to be used to charter the path forward as well as to measure progress that is made as well as manage initiatives that come directly from the community to ensure there isn't hodge prodge development. More critically, having plans for particular projects is critical in the event that external funding becomes available. Even if those plans sit on the shelf for several years, they are invaluable to being able to take advantage of opportunities as they arise.

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<sup>4</sup> UNC School of Government, N.C. Rural Economic Development Center *Small Towns, Big Ideas*, 2008, p.3.

<sup>5</sup> *Small Towns, Big Ideas*, pp.3-9

# APPENDIX 1

Data extracted from Regional Australia Institute - Online [In]Sight Tool

	West Wimmera VIC (LGA)		Naracoorte and Lucindale SA (LGA)		Limestone Coast (RDA)	
	Indicator Value	Rank	Indicator Value	Rank	Indicator Value	Rank
<b>Infrastructure &amp; Essential Services</b>	-	<b>329</b>	-	<b>389</b>	-	<b>42</b>
Access to tertiary education services	2.00%	450	3.40%	187	2.00%	50
Access to technical or further education services	2.40%	250	1.60%	409	3.50%	24
Access to allied health services	11.10%	191	8.20%	421	9.10%	49
Access to GP services	6.44	54	4.63	342	4.4	41
Access to primary education services	24.8	460	34.8	482	43.5	50
Access to secondary education services	10	308	39.3	489	24.4	42
Distance to Airport (replaces Aviation infrastructure)	121.5	427	97.1	376	48.7	42
Distance to Port (replaces Port infrastructure)	178.58	392	174.7	388	131.9	42
Distance to a medical facility (replaces Access to hospital)	41.9	462	8.4	252	7	14
Road infrastructure	8.5	446	4.6	368	3.7	33
Rail infrastructure	45.7	462	69.3	482	81	55
<b>Economic Fundamentals</b>	-	<b>246</b>	-	<b>329</b>	-	<b>18</b>
Wage/labour costs	\$32,889	533	\$35,674	468	\$40,202	57
Business turnover	\$69,334	95	\$67,695	102	\$50,117	4
Number of hours worked	33.7	95	27.6	187	26.3	14
Building approvals - residential	\$404	485	\$879	396	\$1,243.13	48
Building approvals - non-residential	\$729	224	\$222	419	\$692.70	48
Value of industrial buildings	n/a	n/a	\$6,342	244	\$15,738	45
Value of Commercial buildings	n/a	n/a	\$378,090	72	\$383,421	4
<b>Human Capital</b>	-	<b>267</b>	-	<b>213</b>	-	<b>44</b>
University qualification	7.00%	333	6.90%	338	6.70%	56
Technical qualification	20.90%	367	22.40%	288	22.30%	45
High school completion	29.70%	448	35.80%	317	33.50%	54
Early childhood development	6.20%	70	7.80%	124	11.00%	24
Primary School Literacy and Numeracy	440	256	438.3	275	432.8	39
Secondary School literacy & numeracy	541.8	204	546.8	169	539	31
Learning or Earning	94.10%	112	91.90%	217	91.60%	22
Workforce Skill	0.6	131	0.61	125	0.38	30
Adult Learning	2.60%	444	4.60%	272	4.50%	48
<b>Labour Market Efficiency</b>	-	<b>37</b>	-	<b>97</b>	-	<b>18</b>

Unemployment rate	2.60%	36	4.30%	169	n/a	n/a
Youth unemployment	9.00%	165	6.50%	70	n/a	n/a
Participation rate	78.10%	98	78.10%	97	n/a	n/a
Skilled labour	50.20%	47	23.90%	466	n/a	n/a
Welfare dependence	27.20%	257	23.20%	198	n/a	n/a
Long Term Unemployment	5.40%	328	5.60%	347		
<b>Technological Readiness</b>	-	<b>444</b>	-	<b>310</b>	-	<b>45</b>
Internet connections	65.80%	442	72.20%	292	70.60%	48
Employment in technology-related industries	1.60%	477	3.10%	332	2.90%	54
Employment in ICT and electronics	0.20%	398	0.40%	357	0.50%	55
Mobile Coverage	82%	348	96%	231	94%	15
Mobile internet		2 337		2 337		3.1 41
Broadband coverage		4.34 432		4.45 423		5 48
<b>Business Sophistication</b>	-	<b>495</b>	-	<b>360</b>	-	<b>38</b>
Economic diversification		0.12 522		0.31 394		0.49 53
Exporters, importers, wholesalers	0.00%	358	0.26%	85	0.18%	15
Income source ? own business	\$27,671	124	\$23,035	197	\$24,556	15
Access to local finance	4.23%	103	5.79%	53	4.04%	15
<b>Natural Resources</b>	-	<b>36</b>	-	<b>180</b>	-	<b>1</b>
Timber resources	0.00%	134	0.00%	134	0.38%	1
Commercial fishing and aquaculture	0.00%	295	0.08%	173	0.80%	5
Coastal access		121.2 382		77.2 338		35.6 36
National park		14.9 83		38.7 312		25.8 14
Agriculture	45.10%	14	21.50%	154	13.50%	6
Mineral and energy resources	0.30%	328	0.00%	523	0.10%	48
<b>Demography</b>	-	<b>557</b>	-	<b>346</b>	-	<b>50</b>
Population size	4,195	402	8,354	326	64,543	49
Population growth rate	-2.10%	560	0.10%	416	0.26%	55
Population density		0.5 432		1.8 336		3 36
Population turnover	32.40%	88	35.60%	136	36.20%	14
Senior dependency ratio	38.30%	516	25.10%	310	25.40%	34
Young dependency ratio	31.20%	315	30.00%	246	31.00%	37
<b>Institutional Foundations</b>	-	<b>104</b>	-	<b>381</b>	-	<b>34</b>
Volunteer Activity	41.80%	18	33.70%	66	27.70%	4
Community Skills Base	12.10%	301	10.90%	403	10.70%	50
Leadership Capacity	51.40%	49	35.80%	212	34.40%	23
Public Service Workforce	2.70%	311	1.90%	485	1.70%	58
Financial Burden of Local Government	n/a	n/a	n/a	n/a	n/a	n/a
Presence of Major Organisations		3 372		10 181		66 28
Local Economic Development Support		1.4 267		0.6 397		9.9 33
Local Government Discretionary Expenditure	\$1,183	80	\$307	247	\$228	36
<b>Research &amp; Development - Science</b>	-	<b>527</b>	-	<b>476</b>	-	<b>54</b>

Science & Engineering qualified	4.70%	509	5.90%	442	7.20%	53
Research & development managers		0 224		0 224		1.49 47
Registered research service providers		0 564		0 564		2 14
Patent applications		0.44 486		1.04 350		1.2 36
<b>Business Dynamo</b>	<b>-</b>	<b>360</b>	<b>-</b>	<b>253</b>	<b>-</b>	<b>52</b>
Business entries	5.30%	526	6.70%	472	7.00%	58
Owner-Managers	31.40%	34	23.10%	153	18.90%	12
Trademark applications		1.12 523		11.28 91		60.54 19
Knowledge-intensive business services	0.90%	467	2.80%	290	1.90%	55



# APPENDIX 2

## Alignment between NLC Planned Economic Development Outcomes & Other Regional Plans

NLC OUTCOME	LC RDA Regional Priorities <sup>6</sup>	Limestone Coast Regional Plan <sup>7</sup>
Opportunities to support agriculture further by holding the industry as a forefront driver of the economy; develop business	1. Economic Development & Diversification	1. Recognise, protect and restore the region's environmental assets  6. Retain and strengthen the economic potential of the region's primary production land
Tourism development; increased business in retail and hospitality	4. Promotion of the Region 3. Human Capital Development	8. Reinforce the region as a preferred tourist destination  10. Ensure commercial development is well sited and designed to support the role and function of towns
Library development, art gallery promotion, public facilities	2. Infrastructure; 5. Community well-being	5. Protect and build on the regions strategic infrastructure. 3. Identify and protect places of heritage and cultural significance, and desired town character
Work with DEWNR to maintain and enhance facilities	4. Promotion of the Region	1. Recognise, protect and restore the region's environmental assets
Promote growth in retail, hospitality	1. Economic Development & Diversification	10. Ensure commercial development is well sited and designed to support the role and function of towns
Promote, educate, train local businesses in retail and tourism - foster growth	3. Human Capital Development	
Continue enhancement of NLC; vibrancy, prosperous and diverse community	2. Infrastructure 3. Human Capital Development 5. Community Well-being	Principle 1 Recognise, protect and restore the region's environmental assets; 12. Design towns to provide safe, healthy accessible and appealing environments
Vibrant sense of community, promote healthy eating and activities	5. Community well being	12. Design towns to provide safe, healthy accessible and appealing environments 10. Ensure commercial development is well sited and designed to support the role and function of towns
Promote sense of pride amongst community, increase use of public areas for all citizens	5. Community well being;	12. Design towns to provide safe, healthy accessible and appealing environments 11. Strategically plan and manage the growth of towns

<sup>6</sup> RDA - LC Regional Roadmap 2013-16 pp17-18 discusses the five regional priorities with sub-goals outlined.

<sup>7</sup> Limestone Coast Regional Plan: A Volume of the SA Planning Strategy, SA State Govt. August 2011

Enhance the look and feel of town through improved signage	2. Infrastructure	12. Design towns to provide safe, healthy accessible and appealing environments 11. Strategically plan and manage the growth of towns 8. Reinforce the region as a preferred tourist destination
Enhanced sense of community, opportunities to network, promote community development on a public scale	5. Community well being	3: Identify and protect places of heritage and cultural significance, and desired town character; 10. Ensure commercial development is well sited and designed to support the role and function of towns 12. Design towns to provide safe, healthy accessible and appealing environments 11. Strategically plan and manage the growth of towns
Safe community for all visitors and citizens, including the encouragement of retirees moving to the district	4. Promotion of the Region	2: Protect people, property and the environment from exposure to hazards 12. Design towns to provide safe, healthy accessible and appealing environments 11. Strategically plan and manage the growth of towns
Promotion of the district on an entire scale, increase tourism numbers and brand recognition	4. Promotion of the Region 5. Human Capital Development	8. Reinforce the region as a preferred tourist destination
Encourage retirees to settle in the region, contributing to economic growth	4. Promotion of the Region 5. Community well being;	12. Design towns to provide safe, healthy accessible and appealing environments 11. Strategically plan and manage the growth of towns
Productive industry that continues to service the whole region, including contributing to employment, retail and services	5. Economic Development & Diversification 3. Human Capital Development	6. Retain and strengthen the economic potential of the region's primary production land
Promote healthy living, including exercise, and attract and retain visitors to the region	4. Promotion of the Region 5. Community well being;	3: Identify and protect places of heritage and cultural significance, and desired town character

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15. Interviews were held with a range of local business operators in the district as part of the research process.
16. UNC School of Government, N.C. Rural Economic Development Center 'Small Towns BIG IDEAS: Case Studies in Small Town Community Economic Development' W Lambe, December 2008

## Adoption and Amendment History

Date	Authorised By	Minute Reference
August 2019		Next review
28 November 2017	August 2016 completed October 2017	Resolution 142/18
26 August 2014	Council	Resolution 54/15