REGIONAL ROADMAP
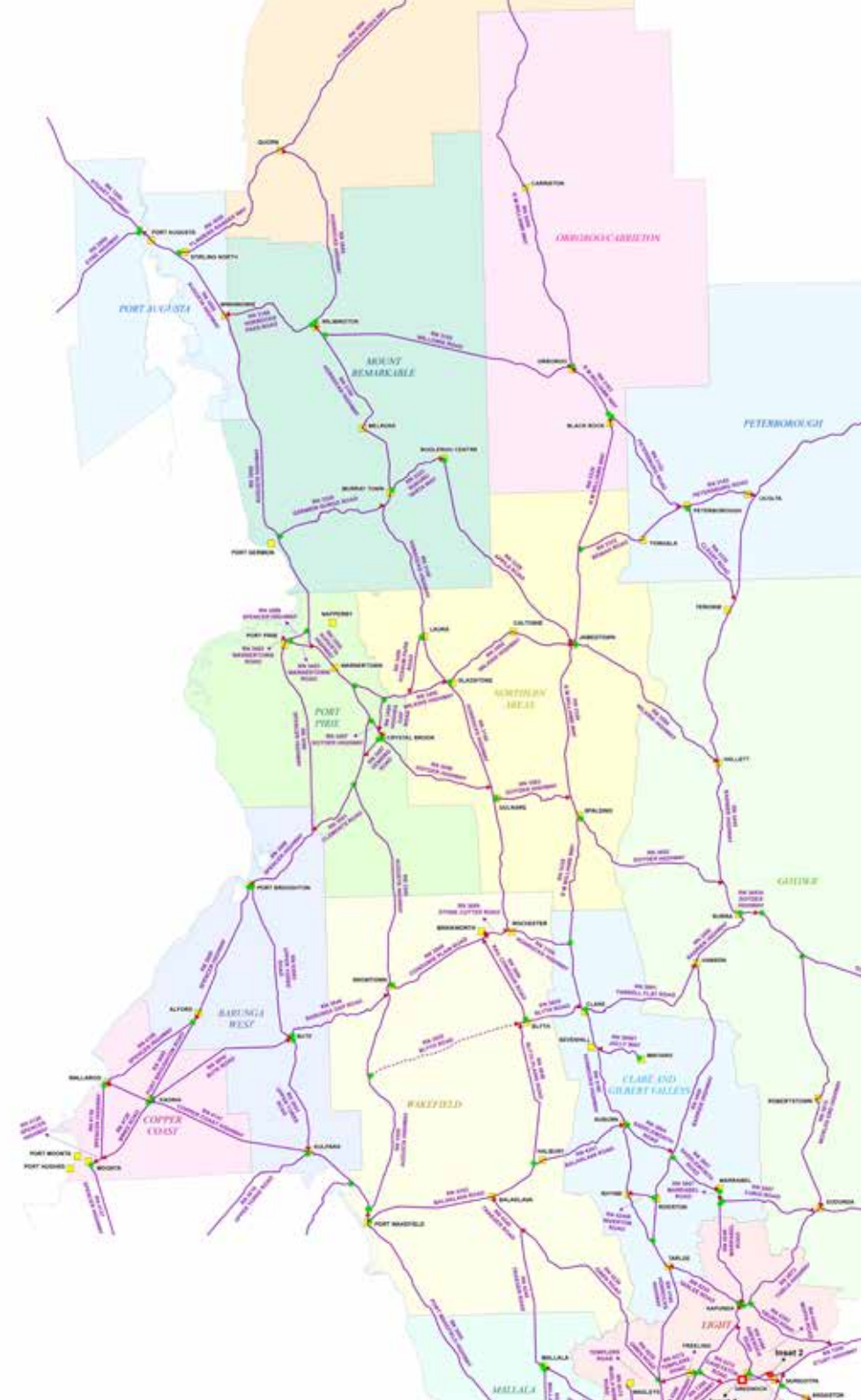## 2018 - 2028

ENGINEERING GROWTH IN THE YORKE AND MID NORTH

The 2018 - 2028 Regional Roadmap is a partnership of.

Regional Development *Australia*
YORKE AND MID NORTH

LEGATUS GROUP

Government of South Australia
Northern and Yorke Natural
Resources Management Board

2018-2028 Regional Roadmap

ENGINEERING GROWTH IN THE YORKE AND MID NORTH

Our roadmap to being the pre-eminent region to live, work, visit and do business in South Australia

FOREWORD

This regional plan signals a new era for collaborative planning and delivering real growth for the Yorke and Mid North region. Three organisations signing on to a single vision, and about to embark on a journey, which will use the unique skills and expertise of each partner, and bring these together for the betterment of the region as a whole.

The vast agricultural landscapes of the Yorke and Mid North are home to numerous industries, businesses and communities, who have built their lives around productive soils and agricultural enterprise. From family farms, to value-adding operations, manufacturing and exporting, the rich soils of the Yorke and Mid North region provide 42% of the State's agricultural grain production.

With farming and productive landscapes at the heart of this region, we look to the theme of organic growth and cultivation to convey our hopes and vision for our economy, our community and our environment.
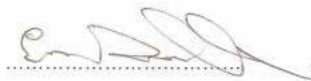
This regional plan is a collaborative approach to supporting this region to be the best it can be. By identifying the growth factors and levers, which support our regional businesses and communities, we can take advantage of existing opportunities and proactively generate new ones. As regional leaders we commit to the active leadership required by our organisations, communities and industries to grow the Yorke and Mid North in a sustainable way.

We collectively endorse this plan and look forward to delivering it in partnership.

Signed,

Bill Vandepeer   Eric Sommerville   Mayor Peter Mattey

1. EXECUTIVE SUMMARY

1.1 A Shared Vision for the Future

The Regional Development Australia Yorke and Mid North (RDAYMN) Regional Roadmap 2018-2028 takes a local, state, and national perspective to building a vision for the region and identifies associated priorities to assist in the engineering growth in the Yorke and Mid North.

The Yorke and Mid North requires a coordinated approach to building the region's infrastructure and economic development opportunities which ensure our communities are innovative, dynamic, connected and sustainable. Regional collaboration and partnerships are central to the growth of a strong region, and RDAYMN plays a significant role in assisting the region with integrated and coordinated planning.

1.2 Our Share Consultation Journey

This regional plan has evolved through many years of gathering intelligence, data, experience and knowledge across the Yorke, Mid North and Southern Flinders regions. Listening to our stakeholders and communities, working with regional industries and business owners, collaboration with all three levels of Government on local initiatives, presented a comprehensive, collaborative regional plan, through which our three organisations speak as one voice. Never has collaboration and working together been more important than it is now, as our region stands on the brink of exciting growth and change. Working together will provide solid foundations on which the region can focus on the important issues, address those things we wish to change, and wholeheartedly provide the leadership and knowledge to our communities to engineer their sustainable growth.

Our journey began with all three Board partners in this plan (Natural Resources – Northern and Yorke, Regional Development Australia Yorke and Mid North and the Legatus Group) agreeing that a shared plan for the region would bring numerous benefits and align all three organisations under a common goal.
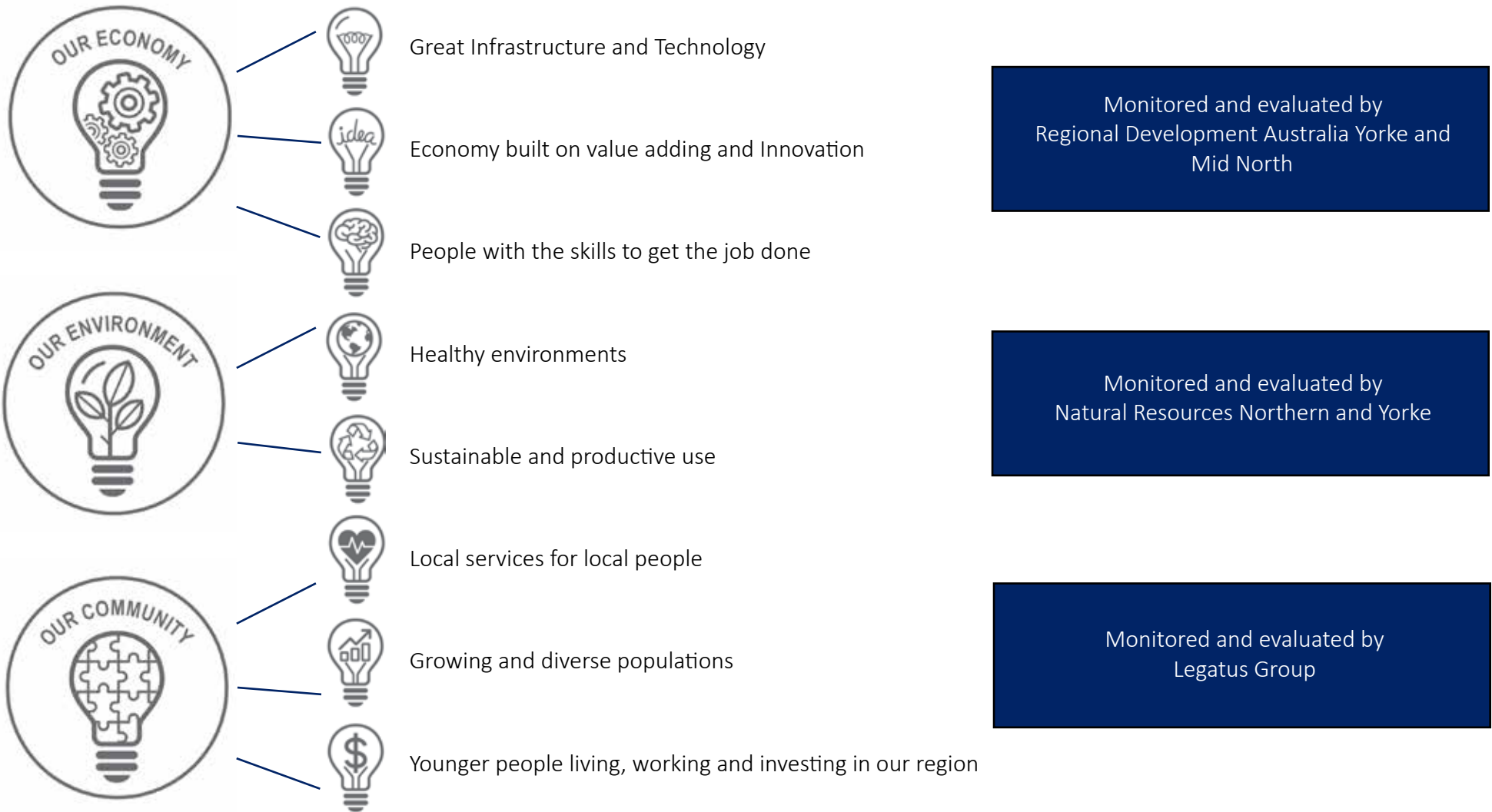
The steps taken to develop this plan included:

- Urban and Regional Planning Solutions (URPS) provided consultation and facilitation of the regional planning process, bringing together a vast array of resources to assist with an initial environmental scan of the region, Legatus Group and Natural Resources Northern and Yorke provided financial assistance to support the consultation process;
- Through a series of workshops stakeholders uncovered key regional issues and proposed solutions for assisting our communities and businesses to grow and thrive;
- The results of the workshops were developed into a report and shared with the three organisations to gauge whether we were 'on the right track', and make changes where necessary.
- This work shaped and structured this regional plan;
- The regional plan was then presented to each organisation's Board for endorsement, and to reignite the commitment to a shared vision for the future;
- Council Strategic Plans and regional priorities were explored and considered;
- The Northern and Yorke Regional Natural Resources Management Plan was examined to ensure synergies;
- Feedback consolidated through RDAYMN and our three Industry Leader Groups and the "Our Skills" Action Plans had been referenced; and
- Other infrastructure documents include, RDAYMN Infrastructure Audit, Legatus Regional Freight Plan and individual Council Asset Management Plans.

1.3 Our Traditional Owners

The Ngadjuri, Narungga, Nukunu and Kuarna and people are the Traditional custodians of the Yorke and Mid North region. We acknowledge and respect the Aboriginal peoples as the State's first peoples and nations and recognise their spiritual, social, cultural and economic practices come from their traditional lands and waters; and they maintain their cultural and heritage beliefs, languages and laws which are of ongoing importance; and acknowledge that the Aboriginal peoples have endured past injustice and dispossession of their traditional lands and waters.

1.4 Regional Focus Areas

OUR ECONOMY

- Great Infrastructure and Technology
- Economy built on value adding and Innovation
- People with the skills to get the job done

Monitored and evaluated by
Regional Development Australia Yorke and Mid North

OUR ENVIRONMENT

- Healthy environments
- Sustainable and productive use

Monitored and evaluated by
Natural Resources Northern and Yorke

OUR COMMUNITY

- Local services for local people
- Growing and diverse populations
- Younger people living, working and investing in our region

Monitored and evaluated by
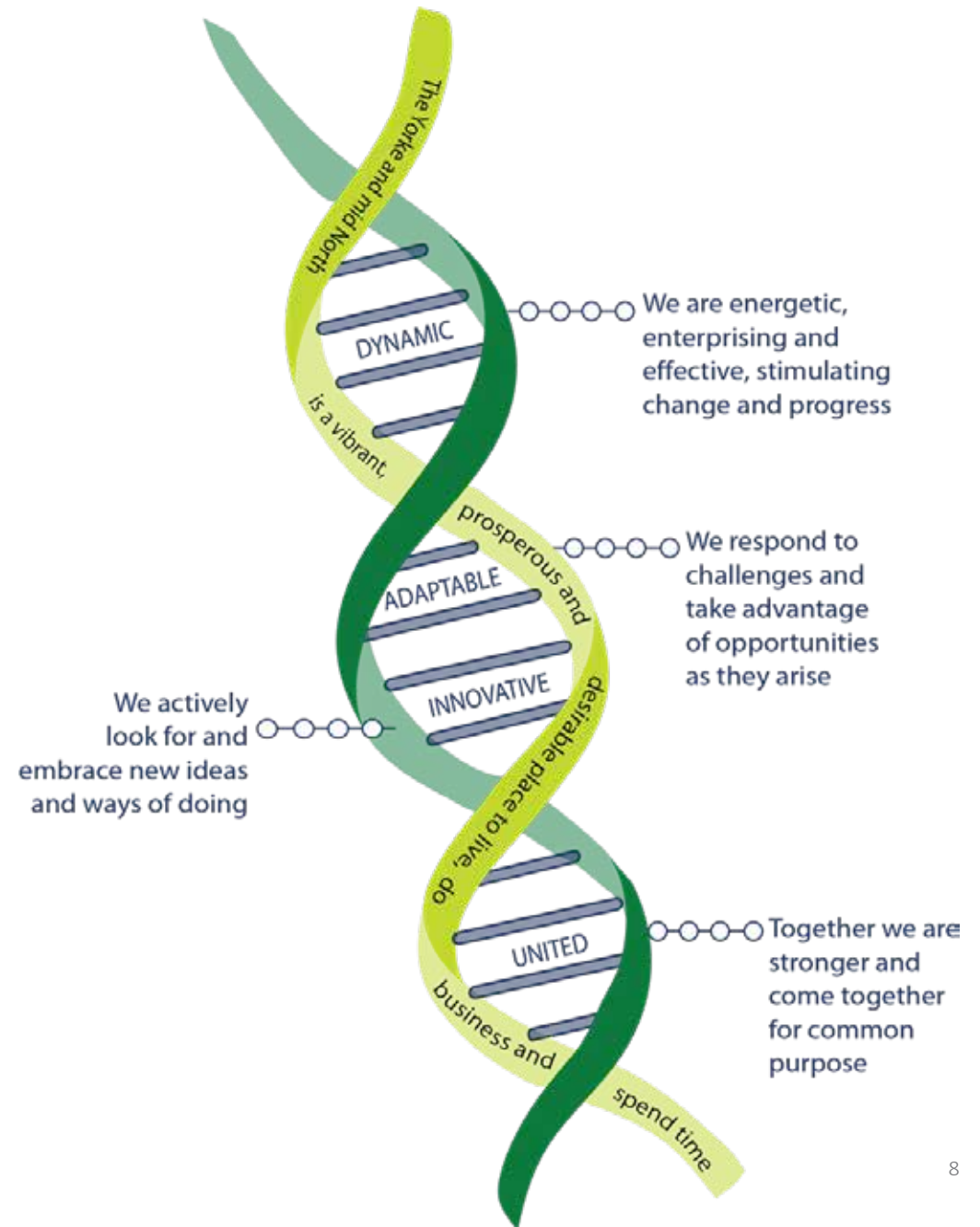Legatus Group

2. OUR VISION

2.1 Regional Identity

The role of regional agencies is to enhance growth and strengthen the community, ensuring long term sustainability of the region.

As a conduit to Federal, State and Local Government, the role of Regional Development Australia, is to be the catalyst to achieve the region's priorities through advocacy, facilitation and funded service delivery.

By partnering with Natural Resources, Northern & Yorke who through all three levels of government have primary responsibility for environmental management, strengthens outcomes achieved in the region.

This Roadmap expresses our region's aspirations for the future and identifies priorities that our region considers will contribute to making this vision a reality.

Achievement of this vision does not reside with one organisation or sector, but rather requires partnership and collaboration with stakeholders in Government, industry, not-for-profits and the community sectors to develop strategies that will 'engineer' this growth.

The Yorke and mid North is a vibrant, prosperous and desirable place to live, do business and spend time

DYNAMIC — We are energetic, enterprising and effective, stimulating change and progress

ADAPTABLE — We respond to challenges and take advantage of opportunities as they arise

INNOVATIVE — We actively look for and embrace new ideas and ways of doing

UNITED — Together we are stronger and come together for common purpose

What do we stand for as a region?

- We actively look for and embrace new ideas and ways of doing things.
- Energetic, enterprising and effective change.
- Responding to challenges and take advantage of opportunities as they arise.
- Together we are stronger and come together for common purpose.
- We are connected to our neighbouring regions and take strength from these relationships.
- We are globally significant as a leading South Australian export region.

Our region's approach to "doing business" and "getting things done" is critical in achieving our vision.

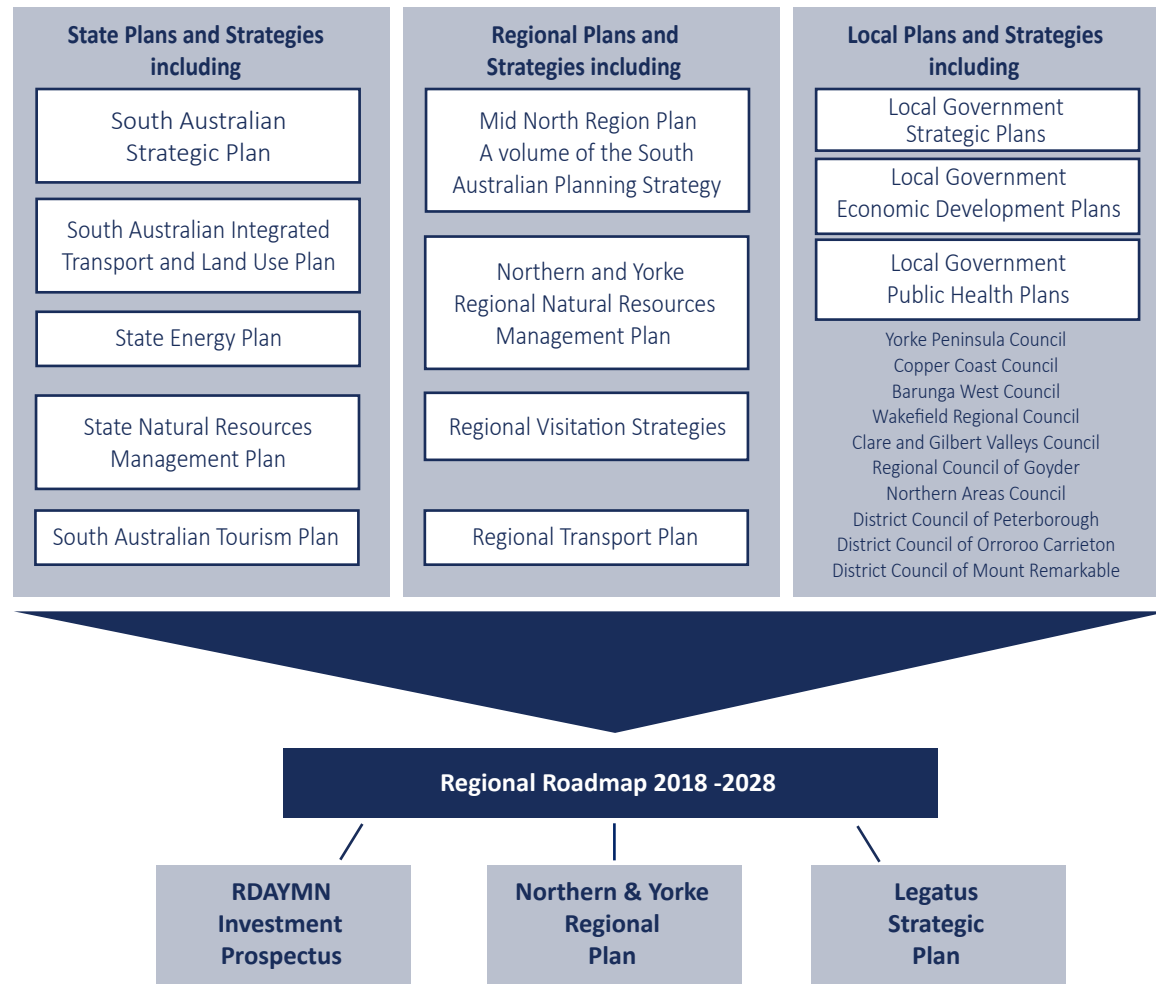| Our approach	What this looks like in practice
We are energetic, enterprising and effective, in stimulating change	Value our local knowledge, capacity and capabilities. Be innovative and look for new and different ways to get things done. Remove barriers that prevent our Region from achieving its vision. Be tenacious and don't give up.
We respond to challenges and take advantage of opportunities as they arise	Embody a 'can do' attitude and bring solutions to the table. Celebrate and promote our successes. Be courageous, take calculated risks and are not afraid to fail. Recognise that one action can have flow on effects and catalyse momentum.
Together we are stronger and come together for common purpose	Be united as a Region and delivery of projects and initiatives through partnership and collaboration. Remain consistent in our messaging within the region and to external audiences. Report on what we can do and are accountable to each other. Be clear about who is doing what and assist each other.
We actively look for and embrace new ideas and ways of doing	We are open to ideas from outside, and use this knowledge and expertise to build local capacity to deliver. We are open to and actively look for new models and approaches to funding and partnerships (eg; including philanthropic and Public / Private Partnerships).

3. CONTEXT & FRAMEWORK

This Regional Plan has been prepared with regard to the broader strategic context of the National, State and Regional levels. The following figure summarises key plans and strategies that are particularly relevant to the Regional Plan for Yorke and Mid North:

State Plans and Strategies including

South Australian Strategic Plan

South Australian Integrated Transport and Land Use Plan

State Energy Plan

State Natural Resources Management Plan

South Australian Tourism Plan

Regional Plans and Strategies including

Mid North Region Plan A volume of the South Australian Planning Strategy

Northern and Yorke Regional Natural Resources Management Plan

Regional Visitation Strategies

Regional Transport Plan

Local Plans and Strategies including

Local Government Strategic Plans

Local Government Economic Development Plans

Local Government Public Health Plans

Yorke Peninsula Council
Copper Coast Council
Barunga West Council
Wakefield Regional Council
Clare and Gilbert Valleys Council
Regional Council of Goyder
Northern Areas Council
District Council of Peterborough
District Council of Orroroo Carrieton
District Council of Mount Remarkable

Regional Roadmap 2018 -2028

RDAYMN Investment Prospectus

Northern & Yorke Regional Plan

Legatus Strategic Plan

4. REGIONAL ANALYSIS

Criteria used to identify the region's Strategic Priorities:

- Acceptability to the community;
- Meets triple bottom line;
- Achievable/realistic;
- Measurable;
- Has a regional focus;
- Provides an economic return, increases the standard of living;
- Stimulates population growth;
- Adds value;
- Does not put anyone at a disadvantage; and
- Is timely and not open ended;

For each Outcome Area the following information is provided:

- Description of why the Outcome Areas are important to the region.
- Measures demonstrate the successful achievement of the outcome.
- Strategic priorities and other opportunities that can contribute to achieving the desired outcome.
- Key data and other information that provides an indication of where we are now in relation to the Outcome Area.

Each Outcome Areas does not stand alone and it is recognised that there are linkages and interrelationships between them all.

4.1 What does success look like?

Success, for the purposes of this plan, can be defined as the shared collective vision we have for the region, being made reality. Building on the strong foundation of the existing industries, social structures and natural assets, the Yorke and Mid North region into the future will be:

Leaders in Technology

We will embrace new and emerging technology, be early adopters and look for ways in which technology can enhance our communities and schools. We will advocate for regions to receive metro-worthy service delivery (eg phone coverage, NBN etc). We will look to technology to increase our capacity to bring our products and services to national and international markets.

Service levels are maintained or grown

Access to high-quality education and educational facilities will be prioritised, to drive skill development and educational opportunities for our children. We will use technology to share educational resources between sub-regions, between schools and areas of the community. We will advocate for the maintenance of existing health care resources across the region, and where there are gaps, look to fill these gaps or provide viable alternatives. We will prioritise high quality health care, aged care and child care, to look after the most vulnerable sections of our communities.

Possess Great infrastructure

We will continue to advocate strongly for investment in our roads and transport systems, as the Yorke and Mid North region is the gateway to the Adelaide Plains, and to the North of the State. We will look at ways to increase the efficiency and effectiveness of intra-regional freight and passenger travel, and pioneer new ways of moving our products and our people to other regions. We will continue to develop our capacity to be a substantial commercial and industrial hub north of Adelaide, and work with national and international investors to develop strategies for attracting business and development. We will continue to develop and deliver high-quality community infrastructure designed to increase the standard of living for our residents, and to attract sporting events and tourism opportunities to the region.

Celebrate a growing and diverse population

We will actively pursue attracting young people and their families to make their homes in our region, to bring with them their businesses and skills, and to provide a quality of life that is unmatched by metropolitan Adelaide. We will provide support and assistance to new families and work towards providing an economic climate in which infrastructure, investment and service provision for ageing populations can be encouraged. We will celebrate our diversity, our multiculturalism and the patch-work of ethnicities and individual stories that make our region like no other.

A 'Can Do' Culture

We will recognise and promote that we are all responsible for driving change within our own communities, and that a positive 'can do' attitude is what will make these changes happen. We will promote our local volunteers, business leaders, community leaders and high achievers, to recognise their success, and to build their capacity to lead our communities into the future. We will invest time and energy in promoting a sense of resilience and community spirit in our young people, recognising that they will be the leaders of tomorrow.

4.2 Regional Trends

Economic

Employment
- Lower employment growth (6.3 %) than for South Australia (7.2 %).
  (Source: Draft Industry Priority Qualifications Yorke and Mid North. 2006 to 2011)

Unemployment
- Unemployment has increased to 9.5% for the region (June 2016) from 4.3% in 2011, higher than the State unemployment of 7.5%

Young people earning or learning
- 78.3% of 15 to 19 years fully engaged in school, work or further education/training compared to 79.8% for South Australia (Source: Health Atlas 2011 data)

Top 3 Industries (by economic contribution)
1. Agriculture, forestry and fishing (26% of GRP)
2. Health care and social assistance (9%)
3. Manufacturing (8%)
- Between 2006 and 2011 the largest growth was in health care and social assistance (as was with SA), and the largest decline was in agriculture, forestry and fishing. (Source: Draft Industry Priority Qualifications Yorke and Mid North)

Top 3 Industries (by employment)
1. Agriculture, forestry and fishing (19% of workforce)
2. Health care and social assistance (15%)
3. Retail trade (13%)

Transport infrastructure

- Five Ports
- National Road links: Adelaide to Perth (National Highway A1), Adelaide to Darwin (National Highway A87), Adelaide to Sydney (Barrier Highway).
- East-west and north-south national standard gauge rail link connected to the state strategic and primary freight routes near Port Augusta and Crystal Brook (Source: RDAYMN Regional Roadmap 2014)

Utilities
- Largest installed renewable energy source of wind farms in South Australia with over $1billion of development approvals for wind farms under consideration in the region.
- No natural gas provision to Yorke Peninsula.
- Lowest broadband penetration and average internet connection speeds of all the South Australian Government Regions
- SA Water (Murray) use: 'non-residential' (58%), including primary and secondary industries, followed by residential (39%) and commercial (3%). (Source: RDAYMN Regional Roadmap 2014)

Social

Population	• 75, 024 people (2016).
	• 4.5% of total State population and 20% of the regional population of SA.
	• Regional growth of 5% from 2006 to 2016.
	• Growth varies greatly between councils with Copper Coast experiencing nearly 25% growth from 2006 to 2016, Peterborough decline of 12% 2006-2016. (Source: ABS 2016 Census).
	• Bulk of the region's population (30,000) lives outside of main service areas in communities of less than 1,000.
Age	• Older population compared to SA, proportionally less 20-34 year olds, more 55-84 year olds. (Source: ABS 2016 Census)
Socio-economic disadvantage	• Higher socio economic disadvantage (938) compared to South Australia (983) (ABS Index of Relative Socio-economic Disadvantage - below 1000 indicates relative disadvantage. 2011 data. (Source: Health Atlas)
Assistance with core activities	• More people require help with core activities (self-care, mobility and/or communication) (7.6%) compared to South Australia (6.0%) (Source: ABS Census 2016)
Psychological distress	• A reduction in adults suffering psychological distress was noted from 2007-8 to 2014-15, reducing the rate of distress to lower than the State level (12.4 %) compared to South Australia (13.7%) which increased over the same time period. (Source: Health Atlas of SA 2014-15 data)
School achievement	• Fewer people (32%) have completed year 12 (or equivalent), compared to South Australia (49 %). (Source: ABS Census 2016)
Level of qualifications	• Smaller proportion of the labour force (44.3%) has Certificate III or higher qualifications compared to South Australia (54.4%). (Source: Draft Industry Priority Qualifications Yorke and Mid North, 2011 data)
Access to health services	• More adults had difficulty accessing health services (37.1%) compared to South Australia (28.5%). (Source: Health Atlas 2010 data)
Volunteering	• More people volunteering (31%) compared to South Australia (21%). (Source: ABS Census 2016)
National Disability Insurance Scheme	• 217% predicted growth in number of participants. (1900 in 2019)
	• 400% predicted growth in funded support demand. ($100m in 2019)

Environmental

Land area
- 34,930 square kilometres.
- 3.5% of the State's land mass. (Source: RDAYMN Regional Roadmap 2014).

Protected Areas
- 480km2 protected in conservation and national parks. (1.4% of land area).

Land Use
- Agriculture and livestock 32,000km2 (92% of land area).

Coastline
- 760km coastline. (Source: RDAYMN Regional Roadmap 2014).

Tourism destinations
- Flinders Ranges and Outback.
- Yorke Peninsula beaches, coastline and national parks.
- Clare Valley Wine Region.
- Heritage. (Source: RDAYMN Regional Roadmap 2014).

Visitor expenditure
- 2013: $538m.
- 2016: $687m.
- 2020 (estimated) $853m (Flinders Ranges and Outback being the largest predicted contributor $452m and Clare Valley the smallest $99m). (Source: Tourism research SATC)

Water resources
- Four main river catchments: Light, Broughton, Wakefield and Willochra.
- The Northern and Yorke Natural Resources Management Board estimates that most of the region's water resources have already reached or are nearing, their sustainable limits. (Source: RDAYMN Regional Roadmap 2014)

Climate Change Projections
- By 2030 predicted increase in temperature of 0.8°C (mid North) and 0.69°C (Yorke Peninsula) in November to April from 1990 levels.
- By 2030 predicted decrease in rainfall of 3.5% (November to April) and 8.7% (May to October) from 1990 levels.
- Sea level rise 0.5 – 1.0 m by 2100.
- Number of days above 35°c will increase from the baseline average of 17 up to 26 by the year 2030 – a 52% increase.
- Increase in the average number of very high fire days to 22 (a 22% increase) and extreme fire days to 1.8 (a 55% increase) by 2050. (Source: Central Local Government Region Integrated Climate Change Vulnerability Assessment – 2030)

4.4 Where are we now?

The Regional Australia Institute (RAI) has developed [In]Sight, a tool which measures a region's competitiveness against 59 measurable themes, including; innovation, demographics, infrastructure and essential services and economic fundamentals. Measured at Local Government Association (LGA) level (providing a rank out of 563) and at RDA level (providing a rank out of 60), the themes and indicators work to capture a snapshot of a region's inherent ability to attract and utilise capital and to maintain or improve prosperity. These scores are then indexed to produce a score which takes into account regional standard deviations.

Shown below is the rank against each of the criteria for the Yorke and Mid North Region:

Yorke and Mid North (RDA Region)

INDICATOR	DESCRIPTION	National Rank (out of 60)
Human Capital	Measures capabilities of the workforce	53
Infrastructure & Essential Services	Infrastructure as a host of economic development	37
Demography	Population data	60
Economic Fundamentals	Quality of the general economic climate	41
Institutional Foundations	Framework of local bodies which hamper or encourage investment	29
Natural Resources	Physical endowment of the region (natural resources and physical attributes)	25
Labour Market Efficiency	Employment rates and participation	50
Technological Readiness	Existing resources and speed in adopting new technologies	54
Business Sophistication	Quality of regional business networks and individual firms' operations and strategies	35
Innovation	Willingness to try new approaches	54

Analysis

The Human Capital ranking of 53 out of 60 is due to the low educational attainment at university level for the majority of people in the Yorke and Mid North workforce, along with a reduced participation rate (when compared to the rest of the State). Increasing the participation rate, or the rate of those in the region earning or learning, will lead to higher levels of productivity and output. This ranking sits alongside the Demographic Ranking of 60 out of 60, which is mainly due to the high level of population in the region aged over 65, and the associated 'senior dependency ratio' (Seniors as a proportion of the workforce) used to define this metric. A higher proportion of seniors within the population can contribute to increased pressure on local services and organisations (for example health care and transport).

The Natural Resources rank of 25 out of 60 is mainly due to the value of the region's agricultural land and its outputs, and the commercial fishing and aquaculture industries. Also relevant to this high score is the average distance to coastal areas and National Parks, whereby access to both of these resources is relatively easy to achieve.

The rank of 54 out of 60 for Technological Readiness measures technological availability both internet and mobile, and also employment and organisations within the region who specialise in Information and Communication Technology or tech-related industries. Patchy internet and mobile service availability continue to cause concern for productivity within the region, and although the fibre-to-the-node broadband rollout has commenced in areas including the Copper Coast, Clare and surrounds, and Port Pirie, availability of fast reliable internet is still intermittent.
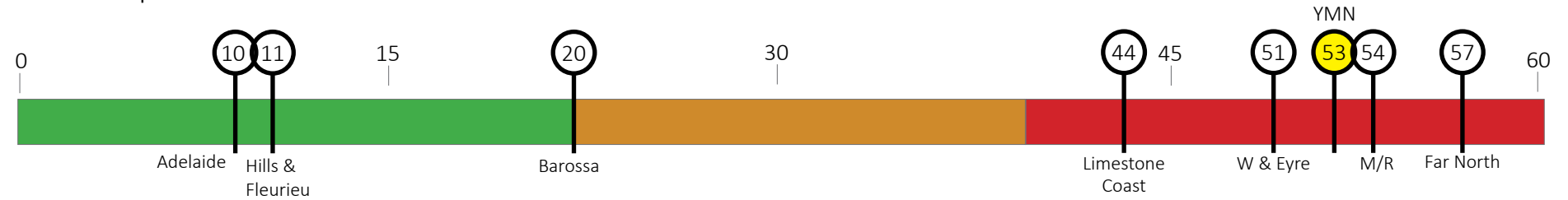
In regards to Infrastructure and Essential Services, Yorke and Mid North ranks 37 out of 60. When using this metric it is important to note that this theme measures both physical infrastructure and its impact, and the ability for infrastructure to provide access to services, including medical and education. For the Yorke and Mid North, access to General Practitioners and Allied Health Services scored well, whereas access to secondary and tertiary infrastructure scored more poorly. For roads and rail, access to these ranked 49 and 51 respectively, reflecting the distance between major Class 1 or 2 roads, and distance to either freight or passenger rail services within the region.

The Business Sophistication score of 35 out of 60 measures access to local finance for small businesses, proportion of those in the workforce who are employed in their own businesses, and number of export/import organisations creating connections and networks outside of the region. The five ports serve to bring regional product to other parts of Australia and the world, and with agriculture as a major employer (which correlates with the high proportion of self-employed workers), this ranking is also influenced by the dominance of a few large employers, including Primo Smallgoods and Nyrstar.
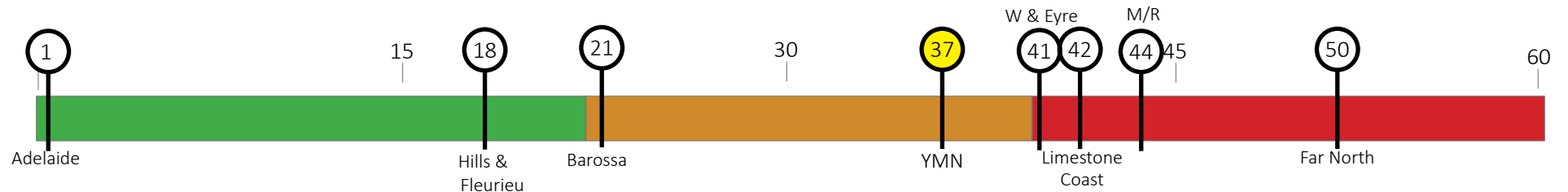
The rankings against each individual theme for each RDA area has been plotted onto a chart to demonstrate where the Yorke and Mid North region sits in relation to the other RDA regions, (Limestone Coast, Adelaide Hills, Coast and Fleurieu, Far North, Barossa, Murraylands and Riverland and Whyalla/Eyre Peninsula). The rankings of each RDA region against each of the key themes is shown in the following charts:
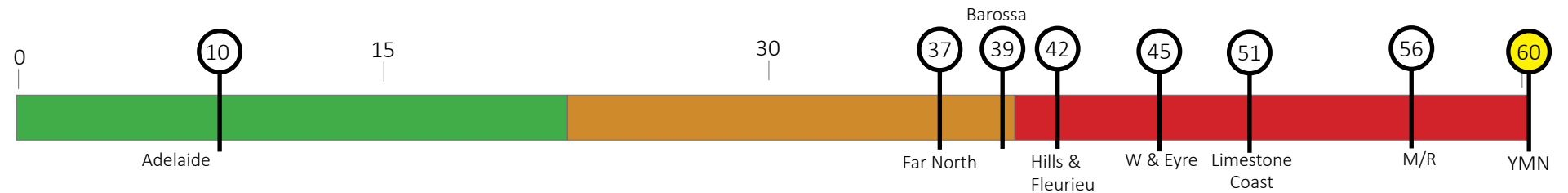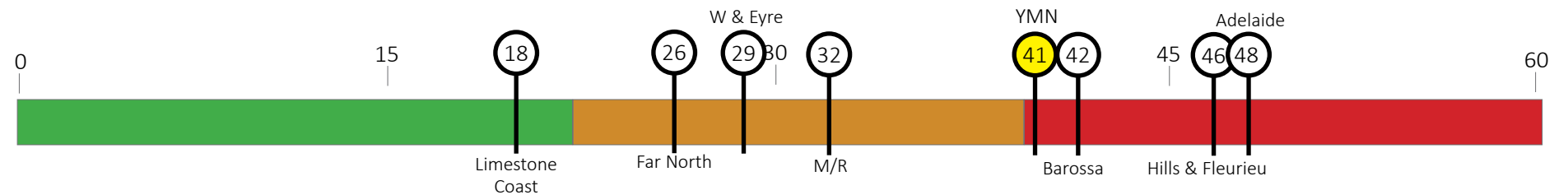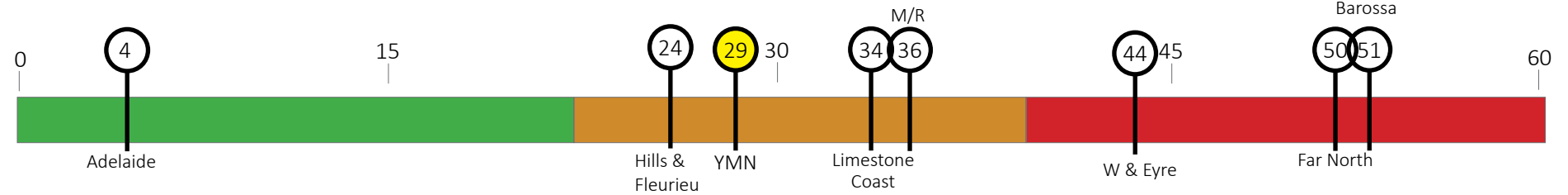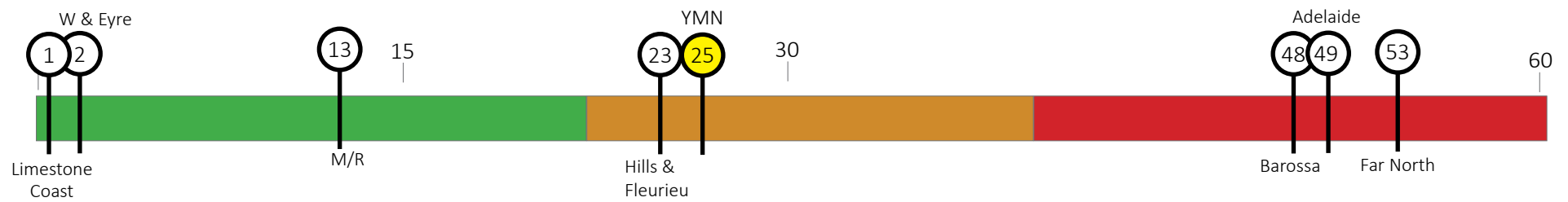
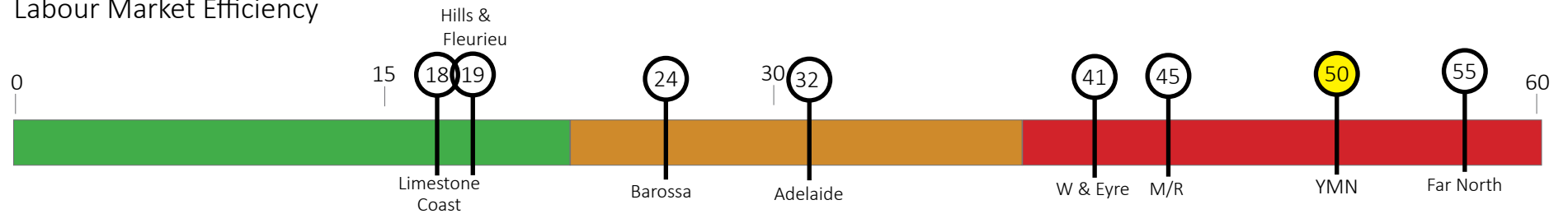## Human Capital

Infrastructure

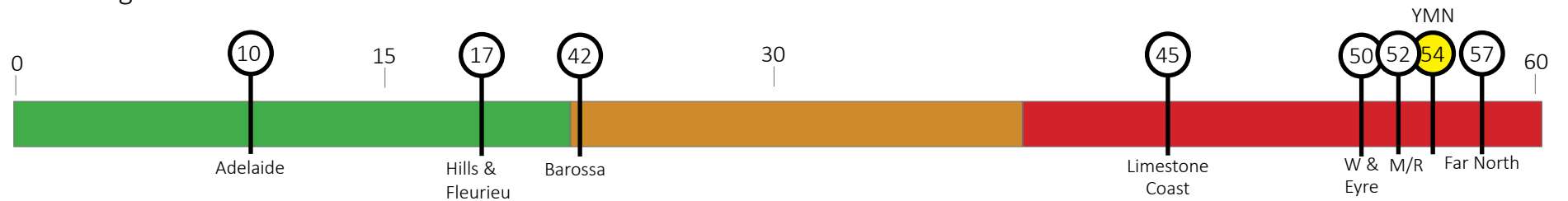## Demography

Economic Fundamentals

Institutional Foundations

0		15	24	29	30	34 36	44 45	50 51	60

4 Adelaide
24 Hills & Fleurieu
29 YMN
34 36 M/R — Limestone Coast
44 W & Eyre
50 51 Barossa — Far North

Natural Resources

1 Limestone Coast
2 W & Eyre
13 M/R
15
23 Hills & Fleurieu
25 YMN
30
48 Barossa
49 Adelaide
53 Far North
60

Labour Market Efficiency

0
15
18 19 Hills & Fleurieu — Limestone Coast
24 Barossa
30 32 Adelaide
41 W & Eyre
45 M/R
50 YMN
55 Far North
60

Technological Readiness

0
10 Adelaide
15
17 Hills & Fleurieu
42 Barossa
30
45 Limestone Coast
50 52 54 57 — W & Eyre, M/R, YMN, Far North
60

Business Sophistication

0 — 7 (Adelaide) — 10 — 11 (W & Eyre) — Hills & Fleurieu — 15 — 29 (Barossa) — 30 — 35 (YMN) — 38 (Limestone Coast) — 45 — 54 (Far North) — 57 (M/R) — 60

Innovation

0 — 6 (Adelaide) — 15 — 28 (Hills & Fleurieu) — 30 — 34 (W & Eyre) — 42 (Barossa) — 53 (Limestone Coast) — 54 (YMN) — 56 (Far North) — 58 (M/R) — 60

The results shown in the above charts demonstrate that for a number of key themes, the Yorke and Mid North region is experiencing comparable conditions with other regional areas, particularly across the themes of Human Capital, Technological Readiness and Labour Market Efficiency. It is pleasing to see that within the South Australian regional comparison that Yorke and Mid North rates well for existing Infrastructure, Business Sophistication and Natural Resources. Benchmarking the region against these themes at a State level produces an effective 'health check' of the current regional conditions, as a basis for forward strategic planning. The 2016 Census data, when overlayed with these themes, tells a consistent story: the Yorke and Mid North faces challenges in the areas of ageing populations, reduced workforce participation and the challenges faced by business operating in a region, where inconsistent mobile and internet coverage and ageing infrastructure (particularly roads) can inhibit investment and productivity.

Top ranking regions

| INDICATOR	Highest Ranking Area	INDICATOR	Highest Ranking Area
Human Capital	Australian Capital Territory	Natural Resources	Limestone Coast
Infrastructure & Essential Services	Adelaide Metro	Labour Market Efficiency	Brisbane City
Demography	Perth	Technological Readiness	Brisbane City
Economic Fundamentals	Pilbara	Business Sophistication	Western Melbourne
Institutional Foundations	Perth	Innovation	Perth

REGIONAL SNAPSHOT - WHERE ARE WE NOW?

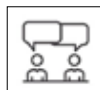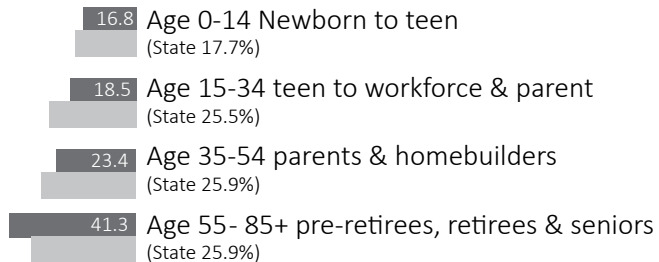## Our People
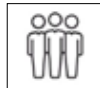
Total population
75, 024 (2016 ABS)
5% growth over last ten years
2% Aboriginal / Torres Strait Islander
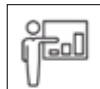
Major growth
Copper Coast Council 23.5%
Clare and Gilbert Valley Council 10.8%

Region age % vs State %

16.8 Age 0-14 Newborn to teen
(State 17.7%)

18.5 Age 15-34 teen to workforce & parent
(State 25.5%)

23.4 Age 35-54 parents & homebuilders
(State 25.9%)

41.3 Age 55- 85+ pre-retirees, retirees & seniors
(State 25.9%)

People needing help with core activities 7.6%
State average of 6.0%

High Volunteering
Nearly 1 in 3 people over 15 years of age volunteer

Our Economy + Infrastructure

Agriculture
Approximately 80% of land is used for agricultural production
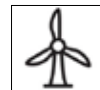15% of GRP = $812m (2016/17)

Roads
Roads are critical to the region

Ports
Five Ports in the region (Port Pirie, Wallarook, Ardrossan, Port Giles and Klein Point)

Wind farms
Approx. 980MW installed (2016)
The region has the largest installed capacity of wind farms in South Australia

Our Environment

District Area
District Area of 34,930km^2
3.5% of States land mass.
800km coastline with Spencer Gulf on the West coast and Gulf St. Vincent on the east.

Household Internet Access 73%
State Average is 81% (up from 64% in 2011). Speed and Security of connection vary greatly.

Mobile Coverage
Some areas have poor or no mobile phone coverage, including Southern Yorke Peninsula, Auburn, Mount Remarkable and West of Hallett.

Areas of Employment
Agriculture 19%
Health Care and Social Services 15%
Retail Trade 13%

Higher Unemployment than the State
Mid North 11.8% and Yorke Peninsula 10.1%.
Lower workforce participation- 55% compared to 62% for the state.

Rainfall
Rainfall ranges from 630mm in Clare to 330mm in Port Wakefield

Climate Projections

Hotter

More Heatwaves

More Rainfall Events

REGIONAL FOCUS 1
Great Infrastructure and Technology

Infrastructure Services

YMN 37

0 — 15 — 30 — 37 — 45 — 60
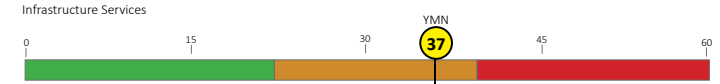
The ability of businesses, industries and communities to thrive in their locations is directly reliant on accessing reliable, built-for-purpose and forward-thinking infrastructure. Technology and technological infrastructure, is changing the way we farm, learn, do business, connect with the world and generate new ideas. Developing and embracing new technologies requires an innovative culture, a supportive business environment and accessible infrastructure that can meet future needs. Primary production is an industry well-placed to adopt and enhance new technologies, as producers aim to value-add to their existing production and to find faster and cheaper ways to access markets. The region's historical reliance on agriculture as a major employer and contributor to Gross Domestic Product (GDP) has transitioned to a more diverse industry spread including, manufacturing, construction, education and training as emerging industries of significance.

Where are we now?

- 73% of households access the internet from home, below the State level of 81%.
- Many larger towns including Kadina, Port Pirie, Jamestown, and Clare now have access to fixed-line NBN.
- Most of the Yorke Peninsula and the western parts of the Mid North has mobile phone coverage (at some level) with 4G in many of these areas. Some areas still have poor or no mobile coverage.
- Wind farms have a generation capacity of 980MW.
- Major road upgrades are completed or in progress.
- Construction of Bowmans Intermodal near Balaklava, linking road and rail transport across Australia.
- Five Ports support the export of mineral products, grain, seed and fertiliser.

What we will do:

- Support the development of community facilities that have flexibility of use, to cater for a range of events and activities.
- Identify and address opportunities for collective solar/grid options.
- Build Business Cases for upgrades to electricity substations and transmission lines.
- Advocate for expanded gas supply lines to service Clare, Bowmans and Port Wakefield.
- Work with local resources to develop long term integrated water planning to support expansion of industry and towns, considering stormwater, wastewater and potable water.
- Support wind farm development and expansion.

Inputs:

- *Key freight and tourist routes maintained at optimal condition.*
- *Development of a new Port Facility.*
- *Infrastructure that meets needs/desired outcomes.*
- *Region-wide access to reliable and affordable broadband.*
- *Development that is climate-ready.*

Outputs:

- *Fit for purpose and safe roads with a reduction in motor-vehicle accidents.*
- *Increase in the proportion of freight transported by rail.*
- *Modern, fit for purpose Port infrastructure.*
- *Continuity of essential service provision (eg; less electricity outages).*
- *An increase in people visiting tourism destinations.*
- *Increase in the generation capacity of wind farms.*
- *100% of the region with access to broadband.*
- *Infrastructure that is designed and constructed taking into consideration projected changes in climate (new, refurbished/ replaced and maintenance of).*

REGIONAL FOCUS 2

An Economy built on value-adding and innovation
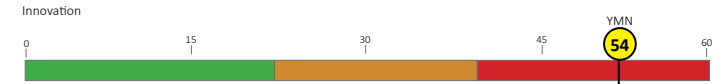
With the existence of a nationally significant agricultural sector, the Yorke and Mid North region contains some of the richest agricultural production land in the country. Whilst some areas of the sector are mature, others are fledgling and require support and investment to thrive. When the spread of agricultural enterprises is plotted onto a map, it is easy to extract the clusters, which form due to factors including environmental opportunity, access to markets and access to labour. With numerous farming enterprises diversifying from the traditional grains and stock outputs, to more sophisticated multi-enterprise concerns, the sector has both diversified in terms of the breadths of inputs and outputs, whilst the size and ownership of farms has consolidated in recent years. Value-adding techniques have shown to drive growth and create expanded markets for agricultural inputs and outputs. Milling flour from grain, processing chick-peas into canned goods, turning lentils into beer, the agricultural sector is seeking new ways to use existing outputs, and to bring diversified products directly to market.

Where are we now?

- YMN derives 26% Gross Regional Product from the sector. (2016 Census)
- Also largest decline in Gross Regional Product share was in agriculture, forestry and fishing.
- 19% of the regional workforce employed by agriculture.
- Agriculture and livestock use of land 32,000km². (approx. 80% of land area).
- Farms are becoming larger, as owners consolidate their landholdings into larger operations, spreading their risk and costs.
- Markets are easier to access than ever before, with the emergence of smaller direct-to-market consultants selling grain directly overseas.
- Climate change is affecting the sector with overall warmer temperatures, competing water use and scarcity of water supply, increased significant events such as fires, storms and floods.

What we will do:

- Work with naturally occurring and established industry clusters to better understand their needs and challenges.
- Map the existing, emerging and opportunity areas for regional agricultural growth.
- Match producers in compatible sectors with a view to encourage value-adding or collaborative production of materials across sectors.
- Advocate for investment in research and development of new production techniques, marketing techniques and value-adding opportunities.
- Champion our local producers and their benefits to the region.
- Establish an Industry Advisory Board to provide intelligence and feedback directly to the RDAYMN Board, along with opportunities for organisations to establish collaborative partnerships for mutual benefit.

Inputs:

- *Establishment of an Agricultural Common Purpose Group designed to highlight opportunities for value adding and innovation across the agricultural sector.*
- *RDAYMN Industry Advisory Board to encourage collaboration and cross-pollination of ideas and opportunities.*

Outputs:

- *A consolidated regional gap analysis of existing, emerging and opportunities for growth in the agricultural sector across the Yorke and Mid North.*
- *Needs analysis conducted on major agricultural enterprises across the region.*
- *An increase in the number of organisations undertaking value adding activities.*

REGIONAL FOCUS 3

People with the skills to get the job done

Human Capital

YMN

0   15   30   45   53   60
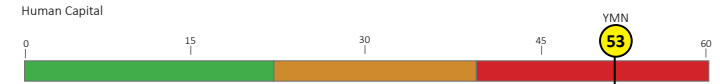
The development of education, knowledge and skills is a key driver for innovation and change. A suitably skilled and productive workforce will provide the 'people-power' to embrace new opportunities, generate economic growth and provide flow-on effects to local communities through the generation and spending of income. People who live in Australia's regions are resourceful, adaptive and collaborative, lending a hand to those in need and 'getting their hands dirty' when work needs to be done. The region stands on the brink of numerous expanding opportunities such as; the rollout of the NDIS, renewable energy initiatives, a revival of the mining sector and a flourishing domestic and international tourism sector. A key growth factor for taking advantage of these opportunities is having the right skill mix and available workforce to fulfill vacancies, within emerging industries. Access to education, particularly tertiary, is key to developing the region's 'human capital' and ensuring those in the community capable of contributing to the region's productivity have a chance to do so.

Where are we now?

- The unemployment rate in the region is on par with the State average (approximately 6.8 percent in December 2017). The region has a "low skills equilibrium"- a low supply of and low demand for skills.
- Lowest Labour Force participation rate of any South Australian government region.
- 36 public and eight privately owned preschool and kindergartens.
- 43 public and ten private primary schools.
- 12 R-12 or area schools, seven high schools and 4 private R-12 or high schools.
- Seven TAFE education facilities.
- No major university in the region.

What we will do:

- Increased support for Aboriginal people and communities to engage in training and employment.
- Support the removal of barriers to enable individuals to access quality training and work-readiness skills.
- Improve the use and promotion of assets and infrastructure in the community that can be utilised for the delivery of training initiatives.
- Increase the number of apprenticeship commencements.
- Respond to the needs of industry, employers, individuals and communities in a flexible and responsive way.
- Build regional capacity and capability through quality leadership programs.
- Strengthen the link between schools and industry to improve the transition of students to the workforce.

Inputs:

- *Establish a regional skills analysis plan, with future projections for emerging industries (e.g. renewable energy, NDIS) to provide a footprint of future skills.*
- *Develop localised skills programs with employers to fill skills gaps and provide pathways to employment.*
- *Deliver career services to people looking for work, to assist with techniques for successful job hunting.*
- *Work with the region's three Industry Leaders Groups to plan and prioritise regional needs.*
- *Fostering entrepreneurial skills and start-ups through establishing a business leaders mentoring program.*
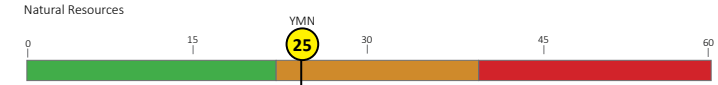
Outputs:

- *An increase in the participation rate.*
- *An decrease in the unemployment rate.*
- *An increase in the number of people studying at Cert IV and Diploma level.*
- *An increase in the number of educational providers in the region, including the local representation of a university.*

REGIONAL FOCUS 4
Healthy Environments

Natural resources support agriculture, viticulture, fishing, and tourism industries across the region. Natural environments provide places for recreation and landscapes that support community wellbeing. This diverse region encompasses the Yorke Peninsula, the Northern Mt Lofty Ranges, the Southern Flinders Ranges together with significant areas of Spencer Gulf and Gulf St Vincent. The wise use and conservation of our natural resources across the region is essential to the sustainability of reliant industries such as; agriculture, animal production, tourism and viticulture. The Northern and Yorke Regional Natural Resources Management Plan's vision comprises three high level goals: Working Together, Healthy Environments and Sustainable Use and this outcome supports and promotes the achievement of this vision.

Where are we now?

- Two percent of the region in protected reserves.
- Environmental Protection Agency (EPA) aquatic system condition monitoring program assessed 11 sites in 2012 and found one in very good condition, three in good condition, five in fair condition and two in poor condition.
- Groundwater status reports for the fracture rock aquifer of the Clare Valley Prescribed Water Resources Area (PWRA) indicate gradual adverse changes.
- 189 flora species and 118 flora species (with conservation rating) in the Northern and Yorke NRM Region.
- Major bushfires at Pinery (2016) and Bangor (2014).
- Natural attractions support tourist activities including; beach visits, fishing, bushwalking and visiting national parks.

What we will do:

- Develop and create new and unique opportunities to experience natural environments, for example, physical adventure, artistic, cultural and culinary experiences.
- Investigate (and where appropriate) progress opportunities for "rewilding".
- Encourage and support best practice by land owners, relating to management of soil, water and biodiversity.
- Encourage opportunities for nature based tourism investments on public land.

Inputs:

- *Implement the Regional Climate Change Adaptation Plan.*
- *Sustainable regional water resource management.*
- *Stormwater management and reuse.*
- *Monitoring condition of natural resources.*
- *Bushfire prevention, preparation, response and recovery.*
- *Targeted Pest plant and animal control.*
- *Ongoing management of fisheries.*

Outputs:

- *Sustainable use of prescribed water resources.*
- *No increase in the number of species of conservation significance.*
- *Increased connectivity and condition of natural habitats.*
- *Increased number of landholders involved in positive natural resource management action.*
- *Reduction in threats to primary production including; pest plants and animals, erosion, acidification and dry land salinity.*

REGIONAL FOCUS 5
Sustainable and productive use

Labour Market Efficiency

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0        15        30        45    YMN   60
                                    50
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 Primary production is the single largest contributor to the Region's economy. Grains, grapes, legumes, livestock, wool and fish are produced for local, national and international markets, with value-adding industries creating a number of complimentary products including food, drinks and garments.

 Sustainable and productive agriculture relies on healthy natural resources, and sustainable management of the Region's natural resources is vital to supporting productive landscapes now and into the future.
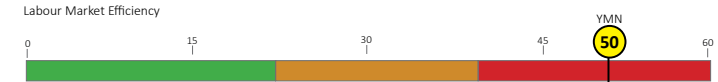
Where are we now?

- Approximately 80% of land use is for primary production.
- In 2015-16 the Region generated
  - > 36% of the State's wheat production.
  - > 52% of the State's barley production.
  - > $448 million grain crop.
  - > $119 million extensive livestock production.
  - > $120 million intensive livestock production.
  - > $24 million wine-grape crop.
- Food and beverage from local production includes olive oil, fruit products, pasta, flour, beer and wine.
- The uptake of no-till farming practices has contributed significantly to the increase of surface cover year round, reducing previous susceptibility of soil to erosion.

What we will do:

- Increase water reuse by industry
- Land-use planning that supports and protects primary production.
- Early adoption of innovative agricultural technology.
- Support research into new plant varieties that are better suited to our changing climate.
- Support innovative practices, training and awareness.
- Build initiatives of our Primary Production Sector.
- Advocate and support value adding industries.

Inputs:

- *Research into new crops and varieties suited to projected climate conditions.*
- *Crop diversification.*
- *Increase regional capacity of landholders to undertake sustainable land management through sharing of information, formal and informal education and provision of advice.*
- *Improved water planning which enables sustainable use of our water resources.*
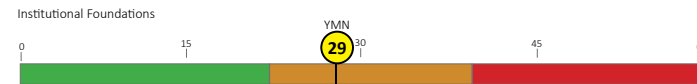
Outputs:

- *Increased volume and diversity of output from primary production.*
- *Reduction in reliance on mains water and groundwater and increased volume of wastewater and stormwater reuse.*
- *Innovative and confident farmers with plans for succession.*

REGIONAL FOCUS 6

Local Services for Local People

The availability and reliability of quality local services plays a large role in attracting, retaining and growing regional populations and communities. Healthcare, education, transport, government services, recreation and retail are all essential services to supply and support thriving communities. By ensuring adequate provision of local services, not only are people supported and attracted to live, work and visit the region, but the economic development of the region is supported by providing localised employment and opportunities for investment and innovation. Great communities are those in which all people have access to the services they need. Often communities must think of innovative approaches to ensure vital services remain accessible and of good quality, and that emerging services are attracted to establish in the region.

Where are we now?

- Councils provide a range of services including roads, libraries, wastewater, Allied Health, sport and recreation facilities and community transport.
- 18 hospitals and health centres in the Region.
- 36 public and eight privately owned preschool and kindergartens.
- 43 public and ten private primary schools.
- 12 R-12 or area schools, seven high schools and four private R-12 or high schools.
- Seven TAFE campuses.

What we will do:

- Develop sound Business Cases for the establishment of new services in the Region with strong advocacy component.
- Cluster government and private services to create regional service hubs that deliver economies of scale and provide a one-stop-shop for the community.
- Provide incentives to support the establishment of new businesses or services or the growth of those existing in the Region.
- Strengthen relationships with universities and regional training organisations to encourage access to education opportunities.

Inputs:

- *Support the financial viability of small businesses and services by sharing staff, skills and resources across organisations.*
- *Encourage the use of local schools to support the growth of quality education services.*
- *Consider new ways to increase service provision eg; development of a regional procurement approach.*
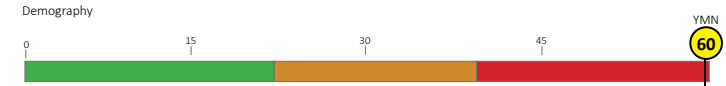
Outputs:

- *Growth in service provision across the region.*
- *Equitable access to quality healthcare and education.*
- *Local businesses employed on local projects.*
- *Population growth.*

REGIONAL FOCUS 7
Growing and diverse populations

Demography

| 0 | 15 | 30 | 45 | YMN 60 |

Vibrant communities are the heart of this region. Whether small or large, vibrant and growing communities drive local character and prosperity. A growing residential and working population is vital to support opportunities for employment, education and investment. Communities are vibrant when they can offer diverse choices in lifestyle options, employment options, social and community opportunities and services. A community that is connected and drives local initiatives creates a point of difference that attracts others to visit, live or work in the region.

Where are we now?

- Regional population has increased by 5% over the last ten years.
- In the last ten years, there have been reductions in the proportion of people aged 0-4 and 25-34 and increases in the proportion of people aged between 45 and 64.
- In the last ten years, the proportion of the population that speaks a language other than English (at home) has increased from 1.9% to 2.5% of the population.
- Nearly one in three people volunteer in the Region.

What we will do:

- Ensure the adequate provision of social infrastructure to support healthy and active communities, including childcare, schools, health services and recreational facilities.
- Provide diverse and sufficient employment opportunities to encourage people to live and work in the region.
- Build on the lifestyle of our communities to retain residents, that travel outside of the region for work.
- Support and celebrate volunteering, community initiatives and opportunities for participation.
- Build on and promote the unique characteristics, identities and offerings of each of our townships and communities.

Inputs:

- Attract people to live and work in the region by promoting;
  Tree-change opportunities.
  Celebrating multiculturalism.
  Encouraging new immigrants, including people of refugee background.
- Support reconciliation initiatives including preparing Reconciliation Action Plans.
- Advocate for changes to legislative requirements to ensure volunteering is easier.

Outputs:

- An increase in people living and/or working in the region.
- An increase in volunteering.
- Increased access to quality childcare, early learning education and schooling.
- Equitable access to affordable health care services.
- Widespread access to diverse recreational, wellbeing and community opportunities.
- Successful community events and activities.
- An active community that drives local initiatives.

REGIONAL FOCUS 8

Younger people living, working and investing in the region

Labour Market Efficiency

0 — 15 — 30 — 45 — **YMN 50** — 60
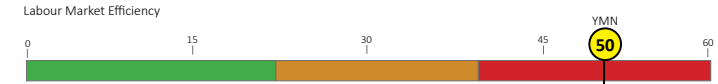
Retaining and attracting young people to the region is essential to ensure an ongoing sustainable population and a workforce for the future. This is especially important in the region, due to its ageing population and a declining birth rate. Young people are our future community leaders and bring new ideas and approaches that can "breathe life" into industries, create new industries and economic directions for the region. It's important to provide a supportive environment of suitable infrastructure, opportunities and lifestyle, that encourages young people to return to or establish themselves in the region, after further education pathways or professional development elsewhere. With a declining birth rate, this supportive environment also needs to attract young couples or families by promoting the region as a great place to start a family.

Where are we now?

- The Region has a lower proportion of younger people (aged between 20 and 44) than the State average.
- The proportion of the population aged between 25 and 34 has decreased in the last ten years.
- The region has a high proportion of single-person households and a smaller proportion of families with three or more people.

What we will do:

- Support the development of a loan program to assist young people to cover the costs of tertiary accommodation, with a repayment discount if they return to the region.
- Increase scholarship programs that encourage young people to return to the region.
- Attract a university to establish a campus in the Region to enable young people to live, work and study locally.
- Provide diverse employment opportunities and career progression of young people in the region, including supporting local industry and encouraging investment.

Inputs:

- *Promote accredited qualified online education opportunities and establish study groups to support local online learners.*
- *Establish local mentors for youth to inspire and encourage participation in education, workforce and community activities.*
- *Extend programs that support students to study or apprentices to train outside of the region, if they return.*
- *Establish local training opportunities to enable young people to live and study in the region.*
- *Create a communication platform to keep young people connected to the region, if they leave.*
- *Attract a private high school to Clare.*

Outputs:

- *An increase in the region's birth rate.*
- *An increase in the number of younger people (aged 20-44) living in the region.*
- *Young people moving, staying or returning to the region to contribute to the local workforce, invest in their communities, or start a family.*
- *An increase in the number of families in the Region.*
- *A diversity of employment opportunities for young people and an environment that support entrepreneurism.*
- *Social infrastructure that supports young families including quality childcare, education and health services, recreational facilities and community networks.*

6. STRATEGIES FOR ENGINEERING GROWTH

To achieve our regional priorities, we will work together in the following ways:

Collaboration: we will work together as regional agencies, promoting communication and information sharing, working to provide intelligence and knowledge both upwards to the State Government and the Federal Government, but also downwards to our stakeholders and businesses. We will approach the achievements of this plan as a collective, recognising that the priority areas are interconnected and will need a combined collaborative approach to be successful.

Responsibility: we will delegate responsibility to individual agencies under this plan, recognising that each partner must play to their key strengths, and will be responsible for taking a leadership role in the delivery of the strategies to achieve outcomes. Each organisation must allocate their own resources/funding towards the achievement of their individual goals, and use their strengths as the basis for their strategies.

Celebrate success: we will work together as a regional Alliance to celebrate the success we have already achieved, and the successes still to some. We will promote and celebrate our businesses and community, to support their achievements individually and as a collective. We will focus on the key competitive advantages of our region and use any opportunity presented to us to celebrate our strengths and achievements. We will actively look for ways to promote our region and our successes, and use any available method or opportunity to celebrate our region.

8. DETAILED REGIONAL PROFILE

1.0 People and Places

1.1   Location
The Yorke and Mid North RDA Region (the Region) covers an area of approximately 34,930 square kilometres, 3.5% of the State's land mass. Located 80km to the north of Adelaide, the region has diverse landscapes from the pristine coastline to rich agricultural land used for cropping, grazing and vineyards and the Southern Flinders Ranges. The Region is bound by 760km of coastline with Spencer Gulf on the West Coast and Gulf St Vincent on the East Coast.

1.2   Population profile
The Yorke and Mid North Region has a total population of 75,024, an increase of over 5% since 2006 (Table 1-1). This represents 4% of the population of South Australia, but nearly 20% of the State's regional population.

Table 1-1 Regional population (2006-2016) (ABS, 2017)

Regional Population (2006)	Regional Population (2011)	Regional Population (2016)	Population Growth (2006 to 2016)
71,346	73,317	75,024	+ 3,678 (+ 5%)

The Region comprises 11 Local Government areas (Table 1-2). Population growth has been variable over the last ten years, with some Local Government areas experiencing decline and some experiencing growth.

Table 1-2 Local government area population (2006-2016) (ABS, 2017)

Local government area	Population (2006)	Population (2011)	Population (2016)	% Population change (2006 to 2016)
Port Pirie Regional Council	17,139	17,332	17,364	1.3%
District Council of the Copper Coast	11,445	12,947	14,139	23.5%
District Council of Yorke Peninsula	11,192	11,025	11,056	-1.2%
Clare and Gilbert Valleys Council	8,144	8,751	9,023	10.8%
Wakefield Regional Council	6,369	6,660	6,801	6.8%
Northern Areas Council	4,649	4,505	4,524	-2.7%
Regional Council of Goyder	4,181	4,163	4,136	-1.1%
District Council of Mount Remarkable	2,843	2,874	2,864	0.7%
District Council of Barunga West	2,544	2,456	2,544	0.0%
District Council of Peterborough	1,904	1,731	1,678	-11.9%
District Council of Orroroo Carrieton	936	873	895	-4.4%

[1] South Australia's regional population is defined as all areas of the State outside the Greater Adelaide area.

The largest centre in the Region is Port Pirie with a 2016 population of 14,007, a slight decline from 2011 (14,044). Other larger towns include Kadina (population of 5,274 in 2016), Moonta (4,839), Clare (4,047) and Wallaroo (4,039).

Towns such as Peterborough, Balaklava, Crystal Brook, Jamestown, Ardrossan, and Maitland are other recognised service hubs, with populations of between 1,000 to 2,000 people.

The 2016 Census Regional Indigenous population was 1,992 (2% of regional population) and has been increasing in the last ten years. This figure is now above the total State average of 2.0%, but less than the South Australian regional average of 4.1%.

A high proportion of the Region's population are located outside of main service centres, in smaller communities of under 1,000 people or rurally based outside of a defined township.

1.2.1 Population projections

DPTI population projections (2016) for the Yorke and Mid North State Government Region (which is the same as the RDA Region), project the Region's population to increase to just over 79,400 by 2031 (see Table 1-3). This figure is considerably lower than the population target of 100,090 by 2036 described for Yorke and Mid North in the Mid North Region Plan (DPLG, 2011).

Table 1-3 Regional population growth (2011-2031) (DPTI, 2016)

| Population projection 30 June 2011	Population projection 30 June 2016	Population projection 30 June 2021	Population projection 30 June 2026	Population projection 30 June 2031
74,400	75,857	77,300	78,392	79,438

1.2.2 An aging population

The Region has a lower proportion of people aged between 20 and 44, and a higher proportion of older people (aged between 55 and 74) than the State average (Figure 1.1).
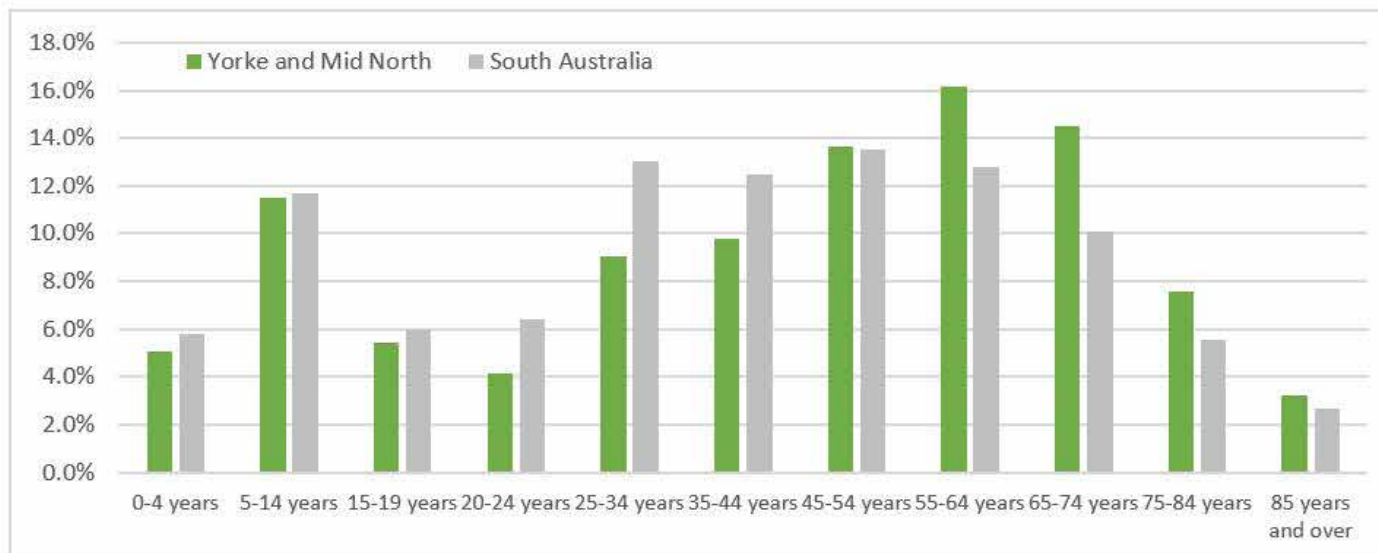
[2] Note that Regional Population from the 2016 Census was 75,024

Figure 1.1 Age profile, Yorke and Mid North and South Australia (2016) (ABS, 2017)

In the last ten years, the proportion of people aged 5 to 24 has remained similar however there have been reductions in the proportion of people aged 0-4 and 25-34 and increases in the proportion of people aged between 45 and 64 (Figure 1 2).
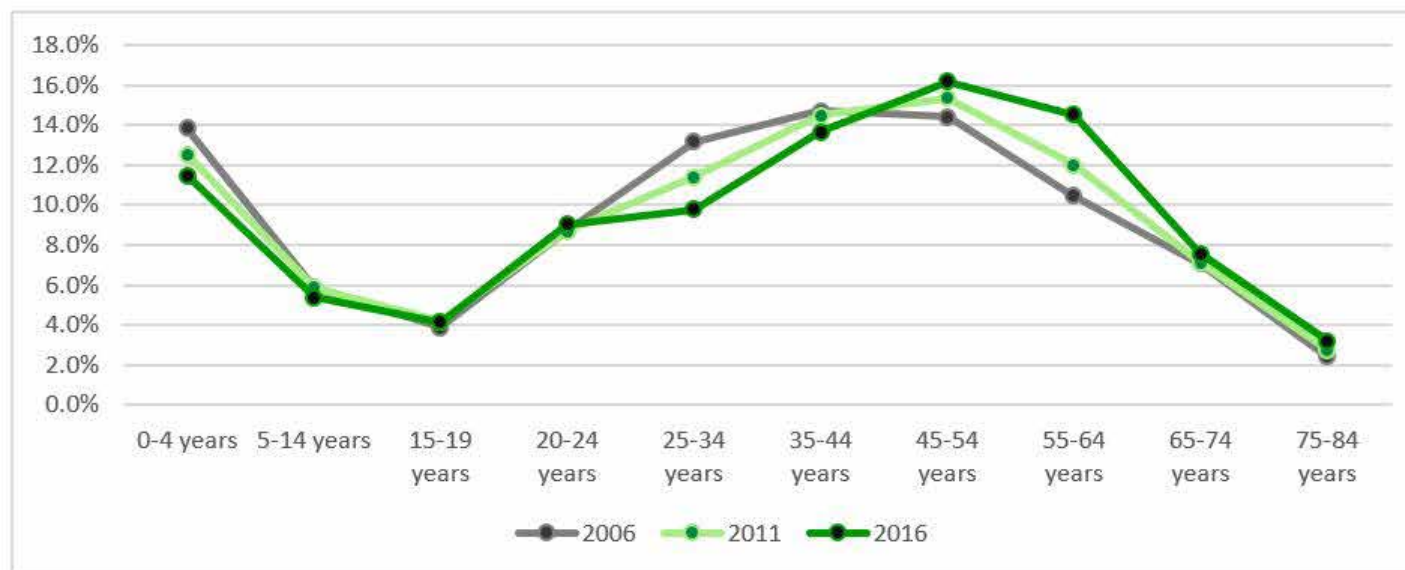

Figure 1.2 Age distribution, Yorke and Mid North Region (2006-2016) (ABS, 2017)

1.2.3 Culturally and linguistically diverse (CALD) communities

In the last 10 years, the proportion of the population that speaks a language other than English at home has increased from 1.9% to 2.5% of the population. The largest increase has been in the Lower North statistical area. The number of different languages spoken at home has increased across the Region, with decreases in the number of people that speak Italian and Greek and increases in Chinese languages and Philippine languages Tagalog and Filipino. Compared to other regional areas of South Australia, there is a slightly lower proportion of people that speak a language other English at home.

1.2.4 Household composition

The average Yorke and Mid North Region household is smaller than those across the State as an average and for regional South Australia (Figure 1 3). The Region has a high proportion of single person households and a smaller proportion of families with three or more people
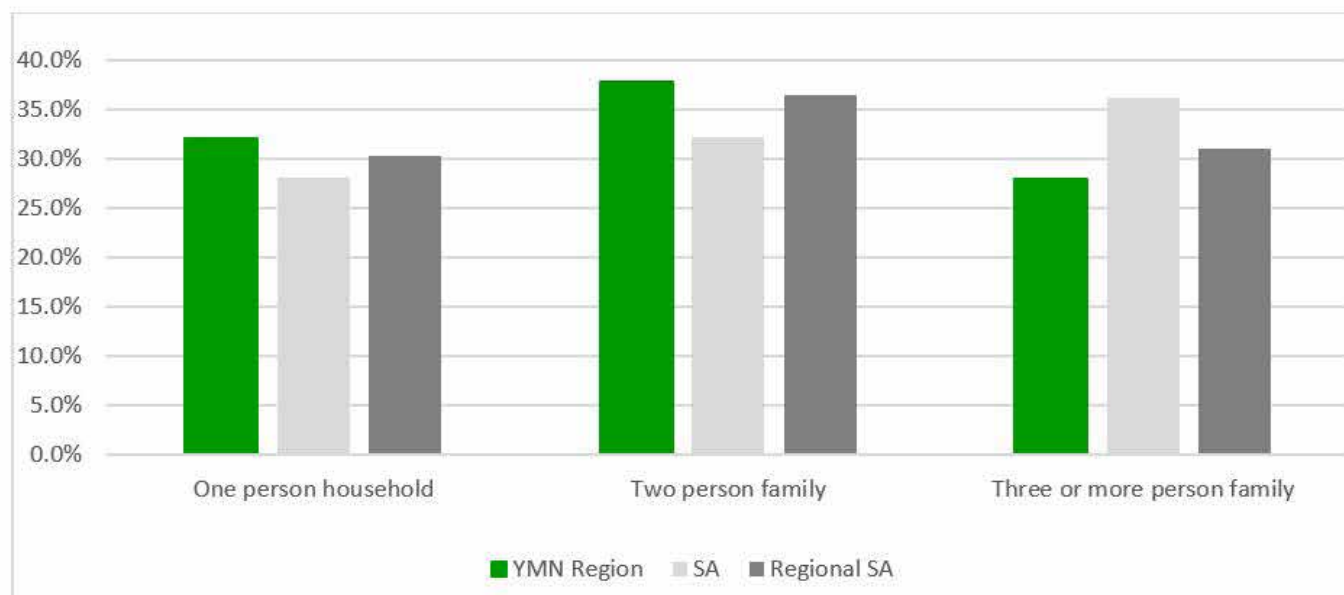
Figure 1.3 2016 household composition (selected household types) (ABS, 2017)

1.2.5 Educational profile

The Region has a significantly lower rate of year 12 completion (32%) compared to the State average of 49% (ABS, 2017).

1.2.6 Employment and labour force participation

Unemployment in the Region has increased, and labour force participation decreased in the last 10 years.
At 55%, labour force participation in June 2016 was lower in the Yorke and Mid North Region than for the State as a whole (62%) and regional South Australia (60%) (PHIDU, 2016). Yorke Peninsula had the lowest participation rate of just under 50%. Unemployment was above the State average in the Mid North (11.8%) and Yorke Peninsula (10.1%).

1.2.7 Household income

Household income has generally increased from 2006 to 2011 (Figure 1 4) , and the proportion of households in the lower brackets has reduced however there remains a much higher proportion of lower income households in the Yorke and Mid North Region compared to the rest of South Australia (Figure 1 5).
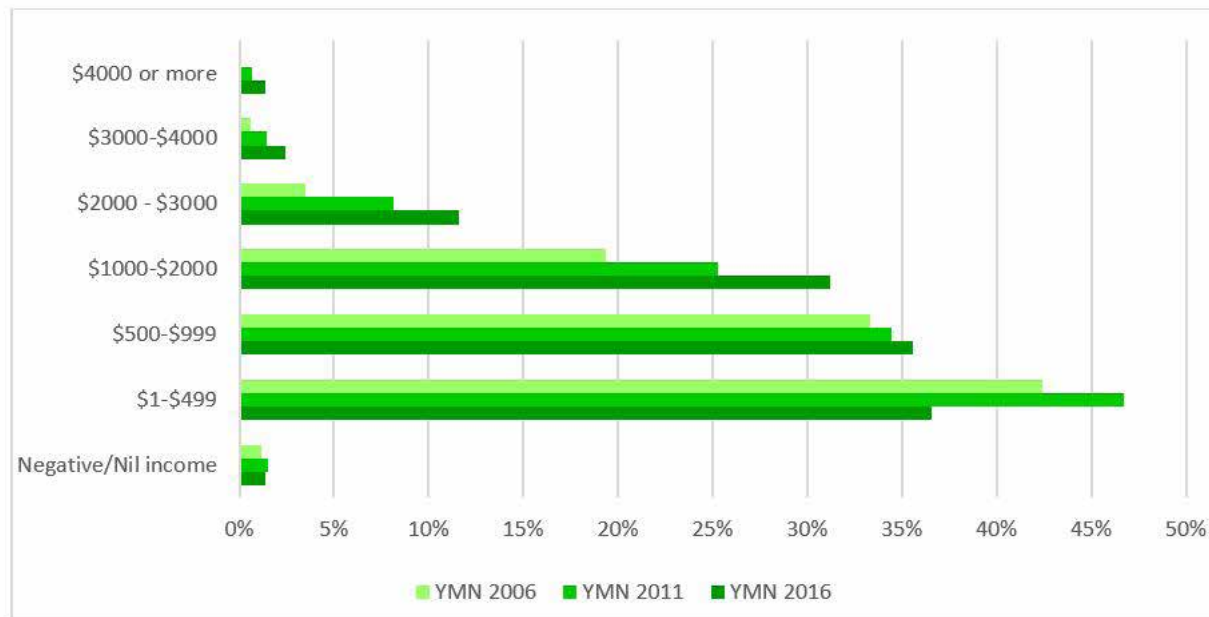
Figure 1.4 Regional household income distribution (2006-2016) (ABS, 2017)
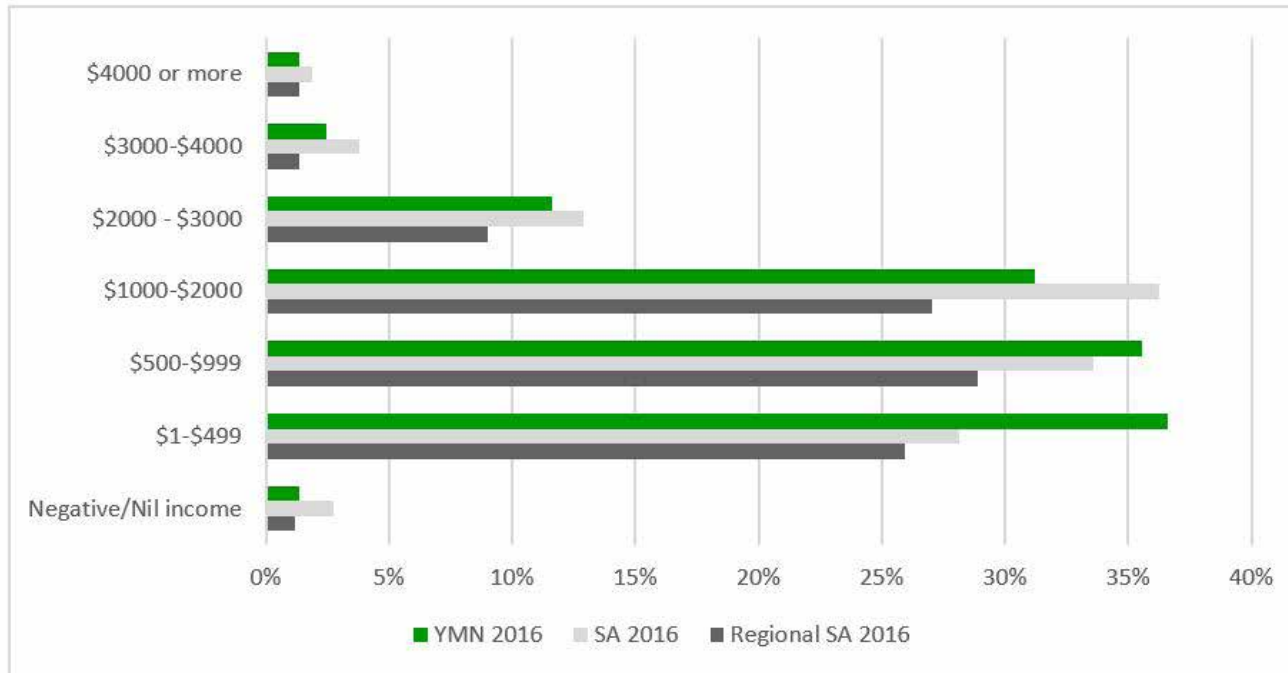
Figure 1.5 Comparison of household income distribution (ABS, 2017)

1.2.8 Motor vehicle ownership

Across the Region, less than 6% of households do not own a motor vehicle, 35% have one motor vehicle and nearly 60% have two or more motor vehicles (ABS, 2017). The level of motor vehicle ownership is higher than the State average, however is similar to the average for regional South Australia.

KEY POINTS

- Low Regional population growth.
- Low, or negative population growth in many councils.
- Higher growth in District Council of Copper Coast and Clare and Gilbert Valleys Council.
- Aging population.
- Low numbers of Culturally and linguistically diverse (CALD) residents.
- Smaller households than other regions.
- Fewer people completed year 12 school level.
- More low income households than other regions.

1.3 Health and social services

More people in the Region require help with core activities (self-care, mobility and/or communication) (7.6%) compared to the South Australian average (6.0%) (ABS, 2017).

Across the Region, all but one of the local government areas have higher rates of fair or poor self-assessed health than the State average. The estimated number of people with fair or poor self-assessed health is highest in Port Pirie, where the rate is one of the highest in South Australia, with more than one in five people reporting fair or poor health. Only Clare and Gilbert Valleys Council has an incidence of fair or poor self-assessed health lower than the State average (PHIDU, 2017).

Community-health based services are provided across the Region by the Yorke and Northern Region Community Health Services – Mid North. Services including Aboriginal Health Clinics, Aged Care, community health nursing, mental health services, physiotherapy and social work are provided at clinics across the region. There are 18 hospitals and health centres in the Region, with the main hub for the area being the Port Pirie Regional Health Service.

KEY POINTS

- More people require assistance with core activities than the State average.
- More people have fair or poor self-assessed health – in Port Pirie more than one in five people.

1.4   Social connection and liveability

A range of sport and recreational activities are enjoyed by residents and visitors to the Region, providing opportunities for community connections to be established and maintained. Informal activities including fishing, boating and sailing (in coastal areas), walking and cycling are popular across the Region. Sports clubs including football, netball, hockey, golf, tennis and bowls are common in many towns and regional sports facilities are located in larger towns, including Port Pirie, Kadina and Clare. Numerous playgrounds, parks and reserves provide opportunities for active and passive recreation. Community Centres, libraries, historic sites and museums, art galleries, theatres and cinemas are located in a number of towns and provide opportunities for residents and visitors to learn and experience a range of art, craft, cultural and historic activities. The Northern Festival Centre in Port Pirie is a multi-purpose arts centre that hosts a range of events attracting residents and visitors from across the Region.

1.4.1 Volunteering

Volunteering rates are an important indicator of community connection. Volunteering rates across the Region are higher than the State average, with nearly one in three people volunteering. The District Council of Orroroo Carrieton has one of the highest rates of volunteering with 43% of people over 16 years of age volunteering (ABS, 2017).

1.5   Natural environment

The Region is reliant on the soil, water, biodiversity and coastal systems that support Regional communities and industries. Good management of natural resources is critical to the future prosperity of the Region. The Northern and Yorke Natural Resources Management Board has responsibilities for natural resources management in the Region and undertake a range of management interventions and education and awareness raising activities. The coastal, agricultural and mountain range landscapes are highly valued by locals and visitors alike.

1.5.1 Water resources

Water resources support primary production and sustain environmental assets including wetlands and lagoons. Regional surface and ground water resources are extracted to support agriculture and viticulture, however these are augmented with River Murray water supplied by SA Water. Surface and groundwater resources in the Clare Valley Prescribed Water Resource Area (PWRA) are managed to ensure sustainable extraction that supports beneficial uses, including viticulture and environmental assets. The 2015 Surface Water Status Report assigned a 'yellow' status to surface water, indicating adverse trends indicating low risk to the resource in the short term (DEWNR, 2016a). The 2014 Groundwater level and salinity status report (DEWNR, 2015) assigned a 'yellow' status for the fracture rock aquifer of the Clare Valley PWRA indicating gradual adverse changes, indicating a low risk to the resource in the medium term.

Environmental Protection Agency (EPA) Aquatic System Condition Monitoring Program assessed 11 sites in 2012 and found one in very good condition, three in good condition, five in fair condition and two in poor condition (EPA, 2012).

1.5.2   Soils

The Region's soils are critical to agriculture, horticulture and viticulture. Soil fertility and productivity varies across the Region, with some areas at risk from water and wind erosion, salinity and acidification. The Northern and Natural Resources Management Board have invested significant resources supporting landholders and farming groups to undertake sustainable land management.

1.5.3   Biodiversity

Biodiversity assets in the Region include native and endemic flora and fauna, ecosystems and communities that exist in inland, coast, estuarine and marine areas. Biodiversity is protected in a number of national and conservation parks including Innes and Mount Remarkable National Parks, which are both popular visitor destinations. Substantial vegetation clearance for agriculture across the Region means that there is little remnant native vegetation cover, particularly on Yorke Peninsula and in the lower parts of the Mid-North. Three ecological communities are listed as critically endangered and 46 flora and fauna species are listed as threatened under the Commonwealth Environment Protection and Biodiversity Conservation Act 1999. The Biological Database of SA indicates there are 189 flora and 118 fauna species with conservation rating in the Northern and Yorke Region (DEWNR, 2016b). The fragmentation and isolation of native vegetation as a result of clearance, pest plants and animals, fire and human disturbance are key threats to the biodiversity of the Region.

1.5.4   Climate and climate change

The Region experiences a Mediterranean climate with mild wet winters and warm to hot dry summers. Annual rainfall ranges from approximately 630mm at Clare to about 330mm at Port Wakefield. Average summer daily maximum temperatures range from over 30°C in northern areas to around 25°C at the southern end of Yorke Peninsula. Average daily winter maximum temperatures range from around 15°C in coastal areas including Warooka and Stenhouse Bay to around 12°C in northern centres, including Yongala and Clare.

The region frequently experiences drought, intense storms and flooding, storm surges and king tides which have damaged agricultural crops, property, infrastructure and coastal, estuarine and marine habitats in coastal areas of the region. Climate change projections suggest an increased in the frequency and severity of these extreme weather events.

Climate projections indicate the Yorke and Mid North Region will be generally hotter and drier. Hot days and extended heatwaves are projected to increase in frequency and intensity, heavy rainfall events are projected to increase in magnitude, particularly in summer and sea level rise and storm surge is projected to increase coastal erosion and inundation.

An Integrated Climate Change Vulnerability Assessment was undertaken for the Central Local Government Region in 2011 (Balston et al, 2011). Key features of the region that were identified to be particularly vulnerable include native flora and fauna, vegetation communities, surface water, groundwater and groundwater dependent ecosystems, commercial fisheries, aquaculture and manufacturing.

KEY POINTS
- Surface and underground water resources in the Clare Valley showing adverse trends, indicating low risk in the short to medium term
- Substantial clearance of native vegetation across Yorke Peninsula and Mid North
- Soils critical for agricultural productivity
- Three ecological communities listed as threatened under the EPBC Act
- Climate projections indicated warmer and drier conditions, with increasing frequency of extreme heat and high intensity rainfall events
- Natural environment, fisheries and manufacturing particularly vulnerable to climate change

2.0   Infrastructure and economy

2.1   Transport

Road, rail and sea transport networks are vital to the Yorke and Mid North Region's economic and social prosperity. Ports, rail and roads support the region's industries including, agriculture, viticulture, fishing, mineral processing and extraction industries and tourism.

Major national highways passing through the region include the Barrier Highway to the west of the region, which is the main route from Adelaide to Broken Hill and Sydney, Port Wakefield Road and the Augusta Highway, which links Adelaide to Perth and Darwin. Main North Road, the Horrocks Highway and RM Williams Way link Adelaide north through Clare and Jamestown to the Flinders Ranges. On the Yorke Peninsula, The Copper Coast, Yorke and St Vincent Highways provide the major links between towns.

Major roads and highways are maintained by the Department of Planning, Transport and Infrastructure (DPTI) and the numerous smaller roads (sealed and unsealed) which traverse the area to link to these major roads are generally maintained by local government.

Rail is primarily used for freight in the Yorke and Mid North Region, with railway lines including the Adelaide – Crystal Brook – Port Augusta line (passing through Port Pirie) with links via Tarcoola to Perth and Darwin, and from Crystal Brook to Broken Hill with links through New South Wales. Rail freight includes grain and hay from across the Region, as well as products from the Nyrstar Plant at Port Pirie.

The development of the Bowman's Intermodal Transport Hub (near Balaklava) included linking the site to the existing rail network, which now enables efficient rail freight from the region to Port Adelaide.

The Ghan and Indian Pacific passenger rail lines use the same rail network, however passengers do not exit or enter these trains in the Region.
There are five ports in the region (described in Table 2-1) operated by Flinders Ports and Viterra.

Table 2.1 Existing Port Facilities

Port	Operation details
Port Pirie	**Operated by Flinders Ports** Primarily used to to import mineral concentrates and other products and export lead and zinc import associated with Nyrstar operations.
Wallaroo	**Operated by Flinders Ports** Main cargo handled include; grains, seed and fertilizer.
Ardrossan	**Operated by Viterra** Used for freight of dolomite and mineral sands.
Port Giles	**Operated by Flinders Ports** Main cargo handled include grains and seed.
Klein Point	**Operated by Flinders Ports** Used to ship limestone for Adelaide Brighton Cement.

There is no major airport in the region, although there are a number of significant aerodromes owned by local governments and private bodies that cater for charter, agricultural services, general aviation and emergency health and other essential services. The largest airport is located at Port Pirie and is owned and operated by Council. There are two runways, an east-west sealed runway of 1043m and a north-south gravel runway of 1069m (Aerodrome Design Pty Ltd, 2012). The runways are suitable for planes with ten or less passengers. There are no regular commercial flights to Port Pirie. There are also several private airstrips located on rural properties.

There is little or no public transport in the Yorke and Mid North Region. There are a number of commercial bus companies which provide passenger and freight transport within and beyond the Region (to Adelaide or Port Augusta). Community transport options including medical and shopping transport are operated in the Region by the Yorke Peninsula Community Transport, Mid North Community Passenger Network and Northern Passenger Transport Network.

2.1.1 Energy supply

The Yorke and Mid North Region is connected to the electricity grid which distributes electricity generated from renewable and non-renewable sources within and outside the Region. The high voltage transmission network is operated by ElectraNet with numerous high voltage substations located across the Region. Lower voltage electricity for customer supply and associated substations are operated by SA Power Networks.

There are two gas turbine power stations in the Region. The Energy Australia operated Hallett Power Station has a current capacity of 203MW and used gas supplied from the Moomba pipeline. GDF SUEZ operates a Synergen Power peak load gas powered generator at Mintaro.

The Region has the largest installed capacity of wind farms in South Australia, with approximately 980MW installed. Wind farms are operational at Wattle Point (91MW), Waterloo (111 MW), Snowtown 1 (100MW), Snowtown 2 (270MW), Clement Gap (57MW), Hallett 1 (Brown Hill) (95MW), Hallett 2 (Hallett Hill) (71MW), Hallett 4 (North Brown Hill) (132MW), Hallett 5 (The Bluff) (53MW).

Natural Gas is delivered into parts of the region via the Moomba to Adelaide gas pipeline system (MAPS) and a lateral servicing Port Pirie that branches off near Whyte Yarcowie. No natural gas is supplied to the Yorke Peninsula.

2.1.2 Water supply

River Murray water supplies residential use in most of the major towns in the Region, as well as significant industrial, agricultural and commercial uses via the SA Water distribution network. Other sources of supply include rainwater for private use and groundwater used predominantly for irrigation with some stock and domestic use. In recent years alternate water supply for irrigation of crops and recreation areas has seen the development of schemes to reuse treated effluent and harvested stormwater.

2.1.3 Information and Communications Technology (ITC)

ICT infrastructure in the Yorke and Mid North Region has improved in recent years. Mobile Phone Coverage Maps indicate that most of the Yorke Peninsula and the western parts of the Mid North has coverage at some level with 4G coverage available in many of these areas. Some areas around the south of Yorke Peninsula, Auburn, Mount Remarkable and west of Hallett still have poor or no mobile coverage.

The rollout of the national broadband network commenced in 2009 with areas around many larger towns now able to access the wireless nbn™ network. Centres of larger towns including, Moonta, Kadina, Wallaroo, Port Pirie, Jamestown, Burra and Clare have access to fixed line nbn™. Construction of the network in additional areas around Balaklava, Price and Saddleworth has recently commenced (nbn™ Co, 2017).

From 2011 to 2016, the proportion of households that accessed the internet from home increased from 64% to 73% (ABS, 2017). The greatest increase in internet access was on Yorke Peninsula. This level of internet access is still well below the State level, where 81% of households access the internet from home, but near the level of 75% for regional households.

2.2 Industry and employment

The following section describes the major industry sectors by their contribution to Gross Regional Product (GRP) and employment as identified from 2015/16 data shown in Table 2-2 (ref Econsearch). Tourism has also been described but not reported as a separate industry by the Australian Bureau of Statistics, however is a significant contributor to the Region.

Table 2.2 Top 6 industries by GRP (EconSearch, 2017)

Industry	GRP ($m)	GRP (%)
Agriculture, Forestry and Fishing	783	26%
Health Care and Social Assistance	272	9%
Ownership of dwellings	241	8%
Manufacturing	198	7%
Construction	186	6%
Retail trade	176	6%

Table 2.3 Top 5 industries by employment (EconSearch, 2017)

Industry	Employment (total jobs)	Employment (% of total jobs
Agriculture, Forestry and Fishing	5,372	19%
Health Care and Social Assistance	4,300	15%
Retail trade	3,643	13%
Manufacturing	2,592	9%
Education and Training	2,154	8%

There has been an increased diversification of employment in the Region in the last ten years. In 2006/7 52% of the people in the Region were employed in the top two industries of agriculture and health care, compared to 34% in 2015/16.

2.2.1 Agriculture and food production

Agriculture is a significant contributor to the Yorke and Mid North economy. There are approximately 3.2 million hectares of land (92% of the Region) used for agricultural activities, producing commodities for both the domestic and export marketplace. These contributed $783 million to (GRP) (26% of the Region's GRP) in 2015/16.

Grain crops contributed about 55% of the 2015/16 agricultural GRP ($448 million) with wheat, barley, lentils, canola and peas most common. According to Primary Industries and Regional SA (PIRSA) crop reports, the region produced 36% of the State's wheat production and 52% of the State's barley production (PIRSA, 2016).

Extensive grazing (predominantly sheep) and intensive livestock (pigs and poultry) contributed $119 million and $120 million respectively to the 2015/16 GRP. Wine grapes contributed $24 million to the 2015/16 GRP. In the Clare and Gilbert Valley, wine was calculated to contribute an additional $32 million to 2015/15 GRP.

There is an extensive array of fresh and value-added foods grown and produced in the region, including:

- Fine meats (saltbush lamb, Dorper lamb, beef, free-range poultry, rabbits, kangaroo, small goods);
- Olives and olive oil;
- Fruit (particularly stone fruits such as cherries, peaches, nectarines and apricots) and fruit products;
- Condiments;
- Free-range eggs;
- Biodynamic grain products;
- Pastas (including non-GM);
- Carob products;
- Shell fish;
- Seafood including ocean, fresh water and aquaculture;
- Boutique beers; and
- Organic vegetables.

The agriculture sector is also the largest employer in the Region, with just over 17% of the Region's workforce directly employed.

2.2.2 Health care and social assistance

The Health and Community Services industry is the region's second largest employer and second highest contributor to GRP. The sector has grown in recent years in terms of both employment and GRP contribution. In 2016 the sector employed 4,300 people, up from 3,828 in 2011.

The Region has a higher proportion of residents requiring assistance with core activities and with fair or poor self-assessed health (refer Section 1.3). Demand for health care and social services is expected to increase in the future.

The introduction of the National Disability Insurance Scheme (NDIS) in the Region from January 2018 is expected to increase demand for disability support services and it is estimated that the current workforce is less than 40% which will be required in the future (NDIS, 2016).

2.2.3 Manufacturing

The manufacturing sector employs 9% of the Regional workforce (2,592 people) and contributes $198 million or 7% of GRP (EconSearch, 2017).

The Yorke and Mid North region is rich in agriculture and marine resources and there are valuable extension opportunities associated with these commodities, including producing agricultural machinery and equipment, transport equipment and human foods and animal food processors.

The region is host to a number of manufacturing companies, the greater percentile being support services for agriculture and mining, in the form of engineering workshops and in general terms, welding/ fabricating services. Food/ meat manufacturers are attracted to the region due to its deep labour pools, location to source and also because of the region's proximity to transport links. Specialist manufacturing also occurs in electronics, pharmaceuticals, wind turbines and shop fittings, adding to the diverse industry base.

Manufacturing in the region includes winemaking, adding value to the production of wine grapes, particularly from Clare Valley.

2.2.4 Retail trade

The retail trade sector employs 13% of the Regional workforce (3,643 people) and contributes $176 million or 6% of GRP (EconSearch, 2017). The number of people employed in retail has increased by about 10% since 2011.

2.2.5 Tourism

Tourism is a significant industry across the Region, with tourist experiences differing between the Yorke Peninsula, the Clare Valley and Southern Flinders Ranges. Tourism SA reports for the Yorke Peninsula tourist region indicate annual average visitor expenditure to be $179 million, with an average of 484,000 overnight visitors to the region, predominantly South Australian visitors. Reports for the Clare Valley tourist area indicate annual average tourist expenditure to be $96 million, with 167,000 overnight visitors, with nearly 40% coming from interstate (South Australian Tourism Commission 2016).

2.2.6 Education and training

Across the Yorke and Mid North Region there are 2,154 people employed in the education and training sector, 8% of the total workforce. A variety of public and private education and training facilities exist including 36 public and eight privately owned preschool and kindergartens, 43 public and ten private primary schools, 12 R-12 or area schools, seven high schools and four private R-12 or high schools. Seven TAFE campuses exist.

9. REFERENCES & APPENDICES

Yorke and Mid North Regional Roadmap 2014 – RDA Yorke and Mid North

Yorke and Mid North Infrastructure Audit 2017 – RDA Yorke and Mid North

RDAYMN Strategic Prospectus 2017 – RDA Yorke and Mid North

Industry Leaders Groups Action Plan – Yorke and Mid North – RDA Yorke and Mid North/Department of State Development

Health Atlas – Upper Spencer Gulf – RDA Far North, RDA Yorke and Mid North, RDA Whyalla Eyre

Youth Project Report – Mid North Knowledge Partnership

Upper Spencer Gulf Stocks and Flows – Strategic Economic Solutions

Identifying Needs in the Southern Flinders – Department of State Development

Industry Priority Qualifications in the Yorke and Mid North – Training and Skills Commission

Supporting NDIS Transition – Department of State Development

Visitor Economy in Yorke and Mid North – South Australian Tourism Commission

Yorke and Mid North Workforce Wizard Report – Department of State Development

The Common Purpose – Advancing the Economic and Social Development of Upper Spencer Gulf – SA Centre for Economic Studies