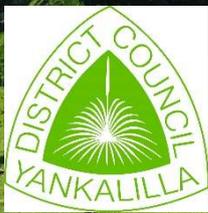




Prosperous By Nature: Economic Development Strategy for The District of Yankalilla 2020-2025

A Framework for Promoting Prosperity

Endorsed November 2020



Prosperous By Nature: Economic Development Strategy for The District of Yankalilla 2020-2025
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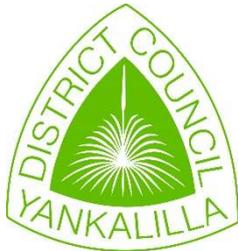


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Executive Summary

A Framework for Promoting Prosperity in The District of Yankalilla

This Economic Development Strategy for the District of Yankalilla provides a five-year planning framework to support the vibrancy, diversity and sustainability of the communities of the Yankalilla district, to 2025 and beyond.

Informed by a well-developed understanding of the district's economic development structure, dynamics and potential, it presents a plan of action, which builds on partnerships and alliances between the District Council of Yankalilla, State and Federal government agencies, regional development bodies, local businesses and the community.

In preparing this strategy, Council engaged with a diversity of government, industry and community stakeholders via a series of industry and community forums and targeted stakeholder consultations. The consultations have been instrumental in helping to establish a vision for the economy of the future and

to guide Council's efforts in promoting and facilitating local economic development. Recognising that Council can help create the conditions for more effective economic partnerships and an environment that enables local entrepreneurship, particularly through promotion, facilitation, information sharing and advocacy, this strategy provides the District of Yankalilla with a roadmap to prosperity.

Designed to effect positive change, the opportunities for action presented in this strategy, when implemented, will help facilitate the resilience, competitiveness and success of local businesses and the capacity of the Yankalilla district community to attract investment, diversify the economy and provide the foundations for the jobs of the future. Strategic, informed and targeted, the themes and actions presented in this strategy have been framed to help realise Council's and the community's economic development objective.

The Yankalilla District's Economic Development Objective

Broadly speaking, 'economic development' refers to the continuous process of growing an area's level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community.

Typically measured in terms of income and employment, economic development is also measured by improvements in education, skills, health, culture, community wellbeing, a sense of place and the environment. Ultimately, it is about improving quality of life or, to capture the concept in a single word, it is about 'prosperity'.

For Council, which has a role to play in promoting, encouraging and enabling economic activity, supporting economic development requires a strategic, informed and targeted approach. To this end, the 'Economic Development Strategy for the District Council of Yankalilla':

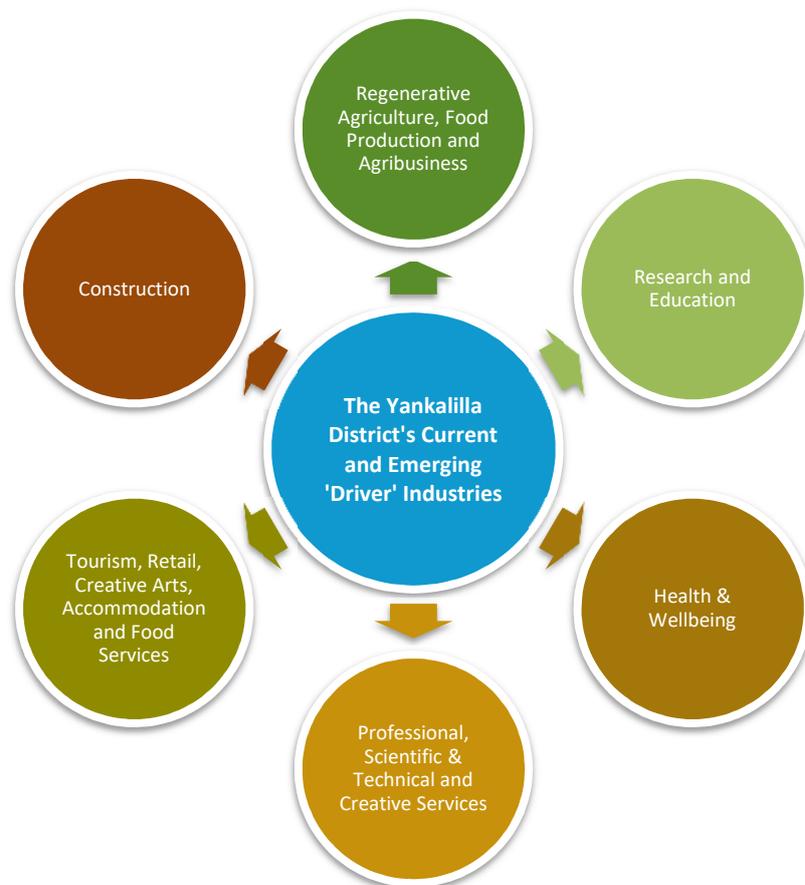
- Establishes a detailed understanding of the Yankalilla district's economic structure and dynamics and relevant regional policy settings which influence and inform a framework for prosperity;
- Articulates economic development issues, challenges and opportunities for the District Council of Yankalilla to consider in its role as a facilitator and promoter of economic development;
- Identifies collaborative partnerships, where Council can engage with other stakeholders on matters concerning local and regional economic development; and
- Provides Council with an informed, actionable and achievable 'roadmap' for economic development to 2025.

The District Council of Yankalilla recognises that it has a vital role to play in the leadership, organisation, delivery and promotion of local economic development. Guided by this strategy, Council is committed to creating the conditions for more effective economic partnerships and enabling innovation and entrepreneurship.

Economic development is about capitalising on comparative advantage. The district's future

prosperity will be underpinned by innovation and value-creation in the area's traditional economic mainstay of agriculture; new investments in industries such as health care, research and education; nature-based tourism and related industries including sport and recreation, retail and the accommodation and food services sector; and opportunities to attract and grow knowledge-intensive activity in the professional services sectors.

The District of Yankalilla's Economic Drivers



A Strategic Focus on the Enablers of Prosperity

The themes and actions presented in this strategy guide Council's efforts on its role as an 'enabler' of economic development.

The opportunities for action focus on the ways in which Council can use its planning and regulatory functions, its resources and its collaborative relationships with other organisations to help stimulate investment, attract new residents, support

the growth of existing businesses and grow the local visitor economy through effective promotion and destination management.

The enablers of economic development refer to the services, infrastructure and support mechanisms required to facilitate positive change. At the local government level, they include:

- Local roads, communications, power and water;
- Appropriately zoned urban and industrial land;
- The urban form and function of the district’s town centres of Cape Jervis, Carrickalinga, Inman Valley, Myponga, Normanville, Second Valley, Wirrina Cove, Yankalilla and other settlements;
- Community services and facilities; and
- Local ‘lifestyle’ attributes such as parks and gardens, cultural and recreational facilities.

At the wider regional level and beyond, the enablers of economic development include those attributes which Council is not directly responsible for, but which it can help influence through its regional economic partnerships and advocacy efforts including, for example:

- Regional transport and communications infrastructure;
- Education infrastructure and workforce skills;
- Research and innovation infrastructure; and
- A supportive regional planning framework.

Collectively, these enablers of economic activity define the district’s economic development potential

and its appeal as a place to visit, work, live and invest in. A focus on how Council can effectively influence the enablers of economic development - either as a lead agent of change or in support of others - underpins this visionary, yet practical and outcomes-oriented Economic Development Strategy.

Regional in scope with a global frame of reference, the ‘Economic Development Strategy for the District of Yankalilla’ articulates and promotes a partnership approach between Council and other stakeholders in government, the non-government sector, the community and industry.

Having regard for the district’s broader policy and planning framework, Council recognises and promotes its role in economic development as being one in which it pro-actively and constructively works with the other stakeholders to promote the district as an attractive destination for people to live, work and play.

This is reflected in the economic development vision and Council’s charter to promote and support the district’s economic development.

A Vision and Charter for Economic Development

The ‘Economic Development Strategy for the District of Yankalilla’ is informed by socio-economic research and analysis and targeted stakeholder consultation.

The strategy themes and actions reflect stakeholder views regarding the district’s key issues, challenges and opportunities, which combined, inform the vision for economic development.

Economic Development Vision for the District of Yankalilla

By 2030, the District of Yankalilla will be a location of choice for innovative and globally-connected ‘smart’ businesses, organisations and people engaged in a diversity of healthy, sustainable knowledge-intensive activities.

The economic development vision is supported by Council’s charter, which articulates its commitment

to promoting, facilitating and co-ordinating local economic development activities.

Council’s Economic Development Charter

The District Council of Yankalilla supports economic development through sound planning, information-sharing and service delivery, to help encourage business to flourish and to cultivate the district’s appeal as a place to live, learn and prosper.

Guided by its economic development charter and the action plan presented in this strategy, the District Council of Yankalilla continuously strives to provide the enabling environment to help facilitate the

competitiveness and success of businesses across all sectors of the local economy. To focus Council’s efforts in this regard, opportunities for action have been identified across three strategic themes.

Economic Development Strategy Themes

This strategy documents opportunities for the District Council of Yankalilla and its partners in government, the non-government sector, industry and the community to address collaboratively, to help facilitate change towards a prosperous future for the Yankalilla district.

To this end, it contains three strategy themes. Opportunities for action have been identified and categorised under the three strategic themes.

These are opportunities that Council and its partners can focus on to help activate and grow the local economy. The opportunities for action are informed by the economic development vision and Council’s economic development charter. Prioritising where Council’s resources can best be directed for the purpose of facilitating and promoting economic development is a key consideration of the ‘Economic Development Strategy for the District of Yankalilla’.

Prosperous By Nature: Economic Development Strategy Themes



Priority Opportunities for Action

Priority projects and activities for implementation are identified based on the application of a broad set of assessment criteria which consider both the anticipated benefits and Council’s capacity to implement the opportunity in question, either as the lead, or in a support role in partnership with other stakeholders.

Some opportunities are focused on *catalyst project planning and development initiatives* which require action combined with a well-planned course of project implementation for the desired outcomes to

be realised over time. Others are focussed on *strategic program implementation* and are initiatives that can be addressed as part of Council’s day-to-day economic development planning and facilitation functions. In a number of cases, these actions seek to build on or continue initiatives already in place.

From the long-list of actions identified, the following twelve are the priorities to be progressed over the first 12 to 24 months of this strategy:

Strategic Program Implementation:

- Allocate Council funding for the appointment of a business liaison officer or similar position in Council, to act as a first point of contact for local businesses and to advise on such matters as business regulations, planning matters and key Council policies (Action 2.1).
- Working in collaboration with the Fleurieu Coast Business Association, establish a quarterly *Fleurieu Coast Business Breakfast Forum* with a program of guest speakers on subjects designed to address topical business interests and local priorities (Action 2.2).
- Collaborate with relevant agencies to facilitate information on and access to State and Federal Government programs which are designed to grow the capacity of new and developing micro and small businesses, including home-based businesses. Provide information and referrals to existing business development and/or mentoring services available through various government programs (Action 2.3).
- Commission a *District of Yankalilla Rural Lands Study* to identify an appropriate balance of zoning to accommodate the needs of the district's key rural land uses including agriculture, industry, biodiversity, tourism, recreation and rural residential, whilst allowing for flexibility and innovation to ensure the potential for future land use conflicts is reduced and to avoid fragmentation of the district's productive farming land (Action 1.7).
- Undertake a survey to identify and prioritise Council-controlled roads in the District Council of Yankalilla requiring upgrades on the basis of safety, conflicting uses (e.g. trucks vs. residents and tourists) and efficiency. Prioritise road upgrades to improve efficiency, reduce the impacts of heavy vehicles and to improve travel times (Action 2.8).

- Commission the preparation of a *District Council of Yankalilla Destination Management Plan* to address matters concerning critical visitor economy infrastructure - signage, roads, telecommunications, visitor accommodation, information and marketing, the (built and natural) environment and governance / regional tourism partnerships (Action 3.5).

Catalyst Project Planning and Development:

- Working in collaboration with the district's farmers, industry bodies, government agencies and the education and training sector, investigate interest in the establishment of a local Agricultural Industry Advisory group to explore the concept of a *District of Yankalilla Regenerative Agriculture and Food Innovation Cluster* (Action 1.1).
- Collaborate with the Agricultural Industry Advisory Group to acquire funding to appoint an *Agribusiness Support Officer* to oversee the development of a *Regenerative Agriculture and Food Innovation Cluster Strategy for The District of Yankalilla* (Action 1.2).
- In consultation with the local community, undertake a land use options study and concept master plan for redevelopment of the Normanville service station site (Action 2.11).
- Commission a Cape Jervis Masterplan to guide development of the jetty precinct and surrounds to revitalise the area by encouraging more activity and expenditure from visitors travelling to and from Kangaroo Island (Action 3.1).
- Prepare a concept plan / tourism master plan for the development of the Myponga Reservoir precinct (Action 3.2).
- Undertake an investigation study into planning and development options for the southern section of the Heysen Trail (Action 3.3).

1. Introduction

1.1 Strategy Purpose and Objectives

This Economic Development Strategy for the District of Yankalilla provides Council with a framework to support the vibrancy, diversity and sustainability of the district of Yankalilla. Informed by a well-developed understanding of the district's economic development structure, dynamics and potential, it delivers a five-year plan of action, which builds on and strengthens partnerships and alliances between Council, government, industry and the community.

'Economic development' refers to the continuous process of growing an area's level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community. While business and industry drives economic activity and employment creation, Council recognises that it has a vital role to play in the leadership, organisation, delivery and promotion of local economic development.

The District Council of Yankalilla is committed to supporting effective economic partnerships that help to enable innovation and entrepreneurship, particularly through brokering, facilitation and information sharing.

Council has engaged with a diversity of the district's key stakeholders to establish a vision and framework for promoting and facilitating economic development activity into the future. In doing so, Council recognises that economic development is ultimately about improving living standards and quality of life, in other words, it is about prosperity.

Economic development is measured by the strength and depth of the Yankalilla district's education and skills base, its workforce capacity and levels of employment, the productive capacity of its local business community, the strength of its institutions to manage change, its natural environment and the community's overall health and well-being.

For the district of Yankalilla, desired economic development outcomes include the growth and retention of existing businesses; new industry development; increased employment; increased visitation (and spend) and the attraction and retention of the district's residents. By articulating Council's role in promoting and facilitating economic development, focusing desired outcomes on Council's activities as an 'enabler' of positive change, this Economic Development Strategy:

- Establishes a detailed understanding of the Yankalilla district's economic structure and dynamics and relevant regional policy settings which influence and inform a framework for prosperity.
- Articulates economic development issues, challenges and opportunities for the District Council of Yankalilla to consider in its role as a facilitator and promoter of economic development.
- Identifies collaborative partnerships, where Council can engage with other stakeholders on matters concerning local and regional economic development.
- Provides Council with an informed, actionable and achievable 'road map' for economic development to 2025.

A framework for promoting prosperity, this strategy provides the District Council of Yankalilla and its economic development partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of the district of Yankalilla to attract new investment, diversify the economy and create the jobs of the future.

1.2 Leveraging Collaborative Pathways to Prosperity

Regional in scope with a global frame of reference, the ‘Economic Development Strategy for the District of Yankalilla’ articulates and promotes a partnership approach between Council and other stakeholders in government, the non-government sector, the community and industry.

This includes RDA Adelaide Hills, Fleurieu & Kangaroo Island, the Department of Primary Industries and Regions and the Southern and Hills Local Government Association.

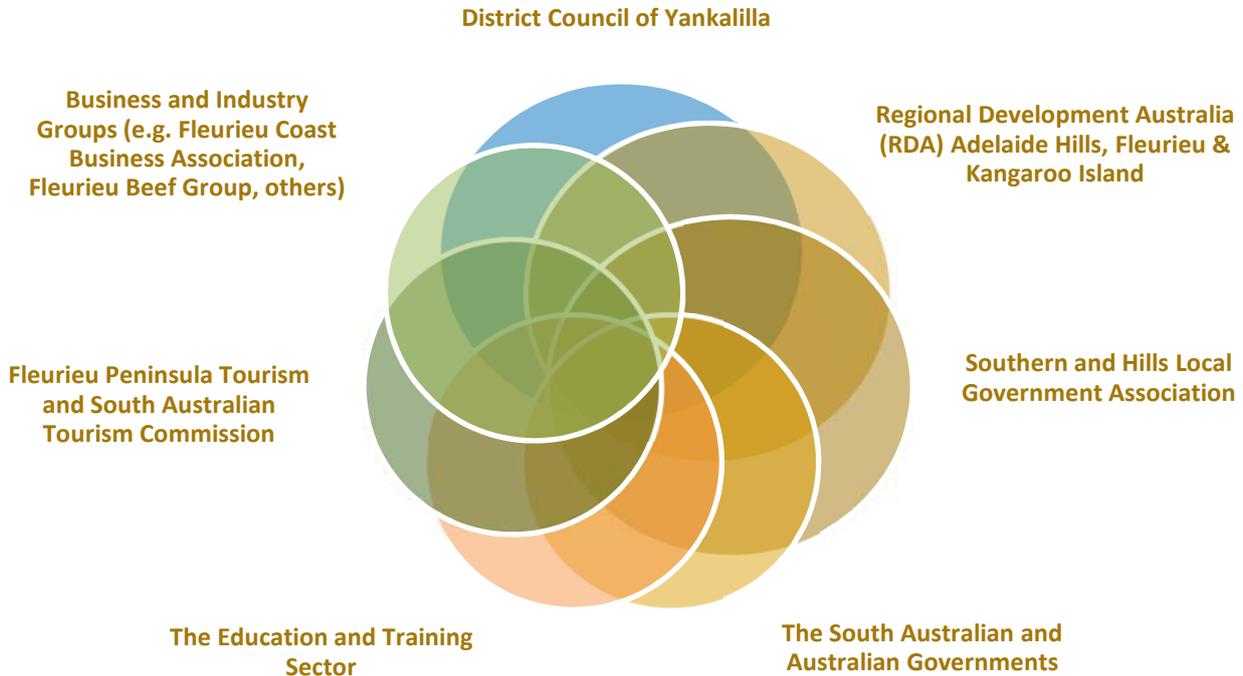
It also involves other important contributors to the district’s economic development including industry peak bodies, the Fleurieu Coast Business Association and the region’s education and training providers.

The ‘Economic Development Strategy for The District of Yankalilla’ acknowledges and embraces the district’s broader policy and planning framework and the region’s priorities as articulated in key policy and planning documents.

It also responds to the many issues, challenges and opportunities raised by the district’s residents and business communities, captured through a series of meetings and forums held throughout the district.

Council recognises and promotes its role in economic development as being one in which it pro-actively and constructively works with the other tiers of government, non-government bodies, industry stakeholders and the community to help promote the Yankalilla District as an attractive destination for people to live, work and play.

Figure 1. The District of Yankalilla’s Economic Development Partners



1.3 A Focus on the Enablers of Economic Development

While business and industry drive economic growth and development, State and Federal Government-sponsored regional development agencies and local government authorities directly influence the enabling environment for prosperity.

The enablers of economic development refer to the services, infrastructure and support mechanisms required to facilitate positive change. At the local government level, they include:

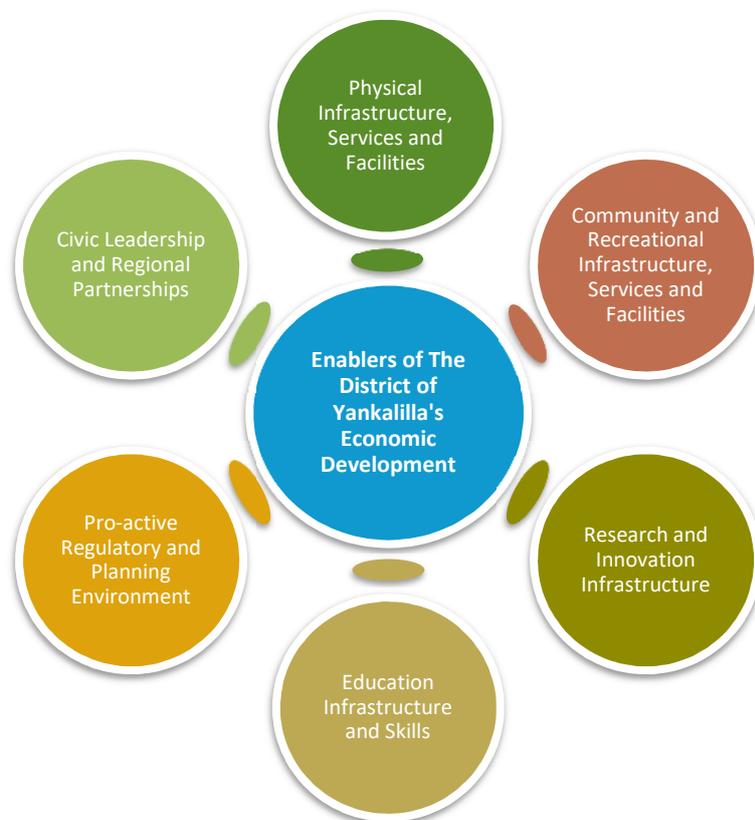
- Local roads, communications, power and water;
- Appropriately zoned urban and industrial land;
- The urban form and function of the district’s town centres of Cape Jervis, Carrickalinga, Inman Valley, Myponga, Normanville, Second Valley, Wirrina Cove, Yankalilla and other settlements;
- Community services and facilities; and
- Local ‘lifestyle’ attributes such as parks and gardens, cultural and recreational facilities.

At the wider regional level and beyond, the enablers of economic development include those attributes which Council is not directly responsible for, but which it can help influence through its regional economic partnerships including, for example:

- Regional transport and communications infrastructure;
- Education infrastructure and workforce skills;
- Research and innovation infrastructure; and
- A supportive regional planning framework.

Collectively, these enablers of economic activity define the Yankalilla district’s economic development potential and its appeal as a place to visit, work, live and invest in. A focus on how Council can effectively influence the enablers of economic development - either as a lead agent of change or in support of others - underpins this visionary, yet practical and outcomes-oriented ‘Economic Development Strategy for the District of Yankalilla’.

Figure 2. The Enablers of the Yankalilla District’s Economic Development



1.4 Council's Economic Development Roles and Functions

Having regard for the enablers of economic development, there are five 'core' areas of economic development activity which underpin Council's role in the implementation of this Economic Development Strategy. These are:

- **Research, Strategic Planning and Place Management** - The District Council of Yankalilla will continue to work to ensure its strategic planning policies and activities respond to the district's economic needs and opportunities. Good 'economic planning' will be defined by:
 - A rigorous approach to research and analysis;
 - Knowledge-sharing;
 - Engagement with State and Federal governments (advocacy);
 - Land use planning; and
 - Strategic project identification and prioritisation.

The District Council of Yankalilla will continue to undertake the studies and research necessary to identify, for example, the district's industrial land capabilities and requirements and it will continue to provide the infrastructure and services necessary to ensure the liveability of the district's towns and settlements.

- **Investment in Local Infrastructure and Services** - Council is committed to nurturing the foundations for prosperity – strategic infrastructure, community services and facilities, services and facilities for visitors (through destination management), access to employment and places where industry can invest and do business. In its role as a facilitator of business activity it will continue to plan for and provide those critical infrastructure items that fall under Council's remit and advocate for those items that fall outside of Council's direct control.

Figure 3. The District Council of Yankalilla's 'Core' Economic Development Activities



- o **Local Business Support** - Local enterprise presents huge potential to take advantage of new investment opportunities and Council understands that economic development requires the support of local businesses to encourage continued investment and employment creation from business and industry already located in the district.

To succeed, local businesses need access to workers with appropriate skills. Council will continue to liaise with business and industry, representative organisations, peak industry bodies and the district’s education and training providers to network ideas and articulate workforce planning priorities that need to be addressed.

- o **Marketing, Promotion and Investment Attraction** - Investment is fundamental to economic development, and access to international, national and regional markets, including visitor markets, is a key determinant of sustainable economic growth. Council will continue to help facilitate private sector investment by promoting what the district has to offer prospective investors, including potential new residents. It will also pro-actively promote the district as a key visitor destination.

Importantly, Council will continue to work hard to attract government investment in the district’s critical strategic infrastructure needs, by identifying local priorities and preparing business cases to inform both Council and other government funding support for key projects.

- o **Economic Development & Tourism Advocacy and Partnerships** - Underpinning the Yankalilla district’s economic development agenda, Council provides a unifying voice for local communities and for local businesses across all sectors of the economy when lobbying State and Federal Governments on key industry or infrastructure issues.

The five core areas of economic development activity described above are interrelated and the initiatives of Council and its partners will often cut across more than one. The strategic themes and actions presented in this strategy reflect these key roles and functions in the context of identified challenges and opportunities to progress the district’s economic development, and Council’s collaborative partnerships with other key stakeholders in addressing positive economic change with an outlook to 2025 and beyond.

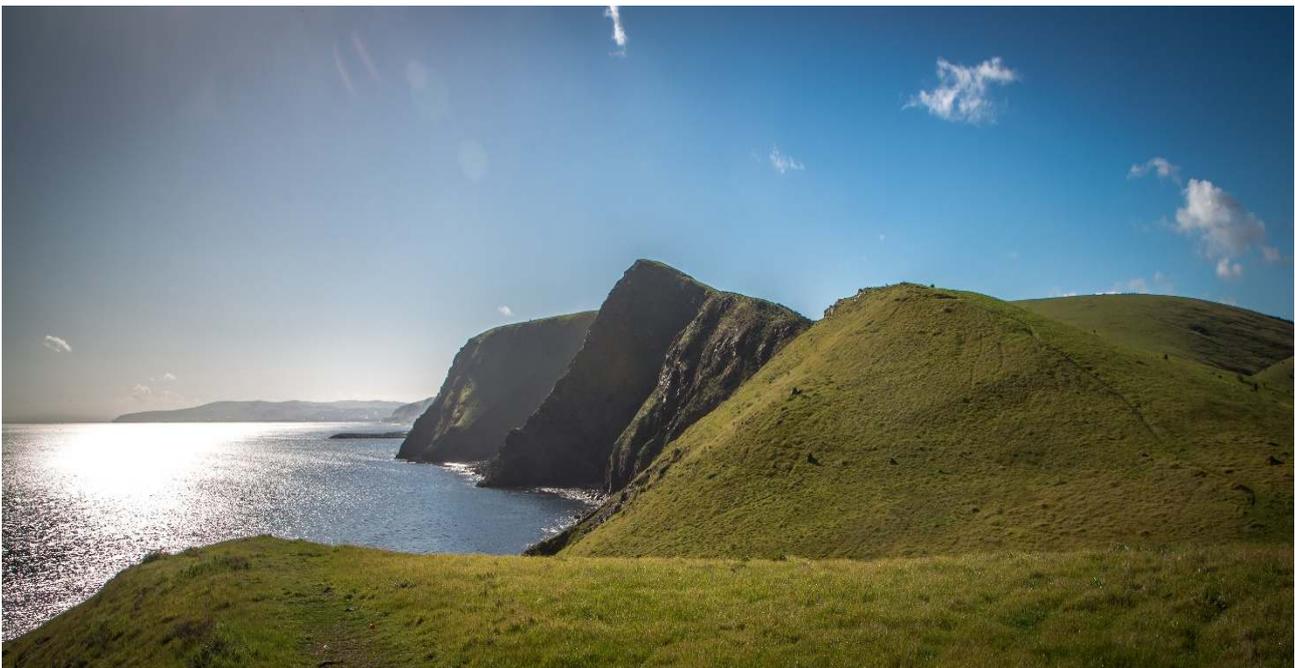


Image: Second Valley (source: Neverest Photography)

2. Informing a Framework for Prosperity

2.1 Population

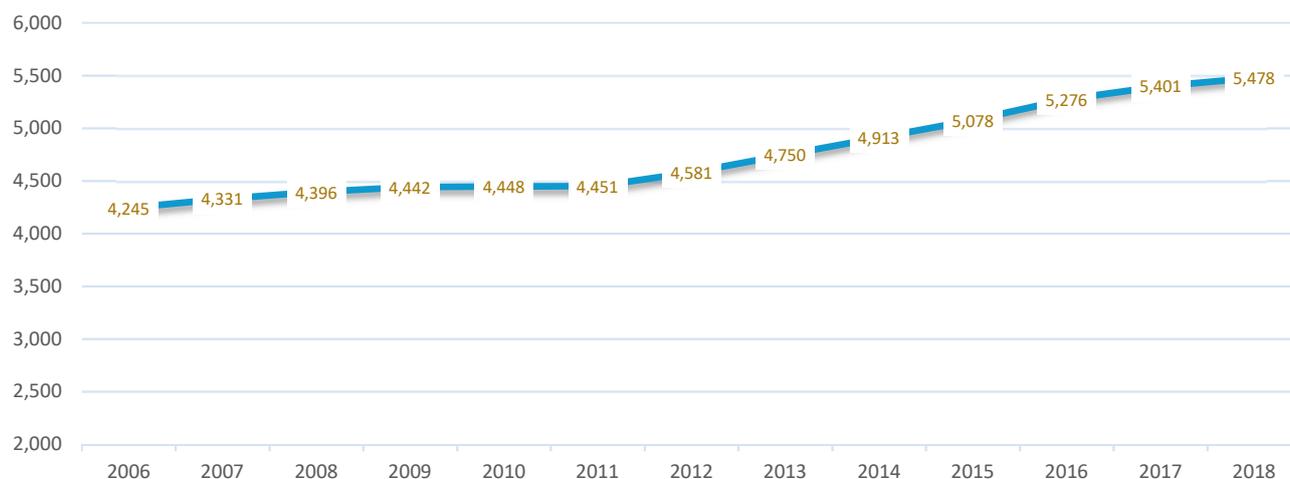
Located 70 kilometres south of the Adelaide central business district (around 1 hour and fifteen minutes' drive), the District Council of Yankalilla, which has a mix of peri-urban and rural communities, has a population of approximately 5,480 (Australian Bureau of Statistics Population Estimates, 2018), which increases to around 16,000 in the holiday season.

Of the district's 3,868 dwellings, 45% are 'unoccupied', reflecting the holiday house profile of the district. Of the 5,529 properties in the area, 63% are residential, 17% are rural and 20% are employment-related.

The strength of the local visitor economy means the district also has a significant seasonal population. This poses challenges for Council's service delivery functions as the local rates base does not reflect the size of the population in the summer months.

The District Council of Yankalilla has experienced a recent spike in population growth, presenting both challenges and opportunities. Between 2013 and 2018, the District Council of Yankalilla's population increased at an average annual rate exceeding 3 per cent; since then, the rate of growth has fallen to less than 2 per cent per annum.

Figure 4. Population, District of Yankalilla, 2006 - 2018



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0) with interpretations by SC Lennon & Associates

The Yankalilla district is included in the wider Adelaide Hills, Fleurieu and Kangaroo Island region. This region is comprised of six local government areas (LGAs) with very different characteristics (e.g. Adelaide Hills vs Kangaroo Island).

According to the *RDA Adelaide Hills, Fleurieu and Kangaroo Island Regional Roadmap 2016-2019*, some key characteristics of the region include:

- A large and fast-growing population in the mainland part of the region, driven by the 30-year Plan for Greater Adelaide.
- Population with a high and growing proportion of older people.
- A high proportion of absent ratepayers in the southern coastal townships.
- Easy access to the Adelaide metropolitan area, particularly from the Adelaide Hills which has high levels of commuting to work and a water

catchment policy that leads to a lack of development opportunity in this area.

- A relatively large labour force but a relatively small regional jobs base as a proportion of the labour force.
- A rising unemployment rate against the state average, masked by a very low unemployment rate in the Adelaide Hills.

2.2 Labour Force

On the economic development front, the Adelaide Hills, Fleurieu and Kangaroo Island region has:

- A relatively diverse economy, with the exception of Kangaroo Island.
- Key wealth-generating industries in agriculture, forestry and fishing, tourism, mineral resources and manufacturing, particularly in food and wine.
- Key service industries linked to population growth are health and community services, retail, building and construction and education and training.
- Business opportunities are mainly in self-employed (micro) to small businesses.
- Business growth is stabilising, particularly for self-employed and small business, but medium to large business numbers continue to decline.

This picture of the wider region requires disaggregation for the Yankalilla District, which exhibits the following characteristics:

- The lowest population base in the region except for Kangaroo Island;
- A healthy population growth rate of 3% per annum since 2011, following a period of little growth;
- Population growth is fuelled by net migration from within South Australia (particularly from the Adelaide metropolitan area) but also supported by net migration from other states and overseas;
- There has been a steady stream of houses being built for over a decade - around 60 to 90 per annum;
- The district of Yankalilla has a median age of 54 compared to 45 for regional South Australia;

- The district has a relatively low number of 'families' (i.e. couples with children);
- It has a relatively lower number of residents aged 15 years and over with tertiary education qualifications who hold a Bachelor Degree or higher (12%) compared to the State average (19%);
- Only 11% of the district's residents who attend an educational institution attend a technical or tertiary institution compared to the State average of 23%; and
- The district has the most affordable housing measured by income to housing cost ratio.

The Yankalilla district's local economy is typified by:

- A labour force participation rate of 48% compared to the regional South Australian average of 54%;
- An unemployment rate of 5.1% compared 6.3% for Regional South Australia, a metropolitan Adelaide rate of 6.0% and a State-wide unemployment rate of 6.1% (source: Department of Education, Skills and Employment, September Quarter 2019); and
- Over one-third of resident workers travel outside the District Council of Yankalilla to other locations for work each day.

2.3 Key Industries

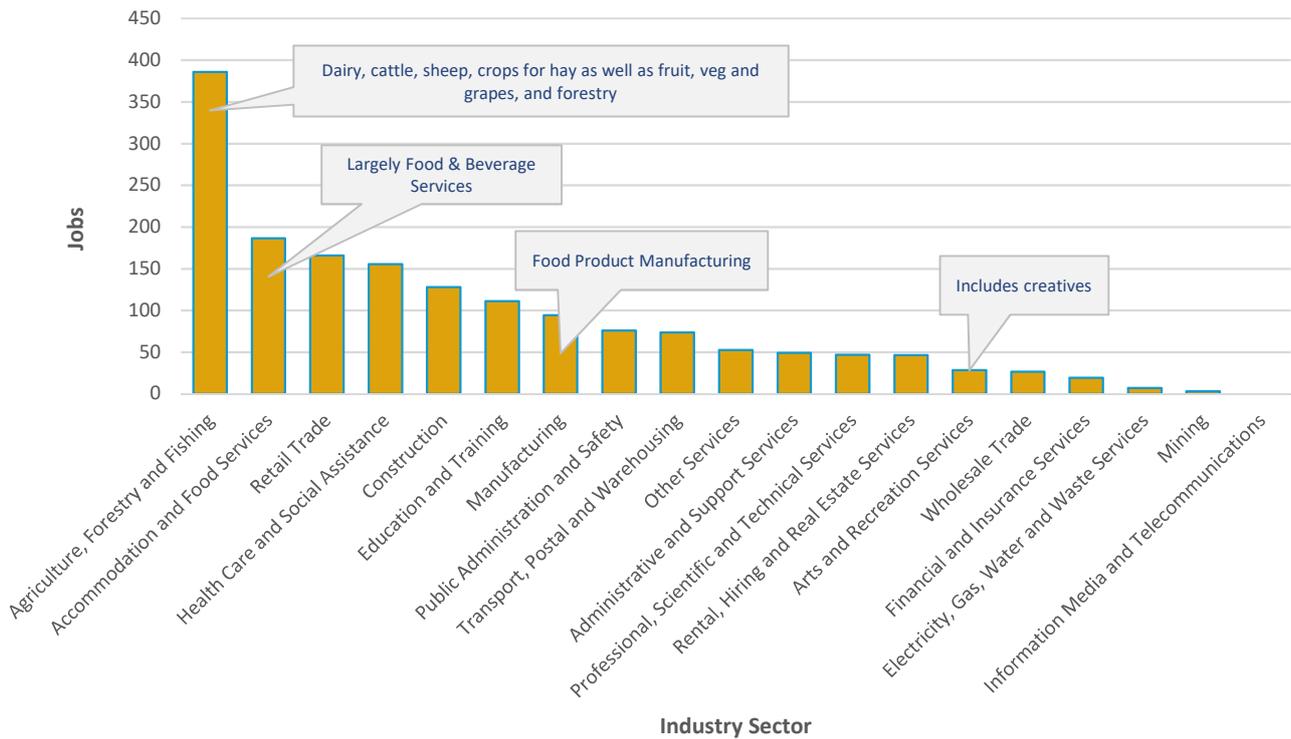
Business and Employment Profile

The district of Yankalilla is home to 521 businesses, with around 70% or 363 classified as 'non-employing' businesses. Anecdotal evidence suggests that many of these are home-based businesses.

Employment by industry sector for Yankalilla is illustrated below. Agriculture, forestry and fishing is the largest sector of employment in the district followed by the accommodation and food services sector, the latter providing an indicator of the importance of the area's visitor economy.

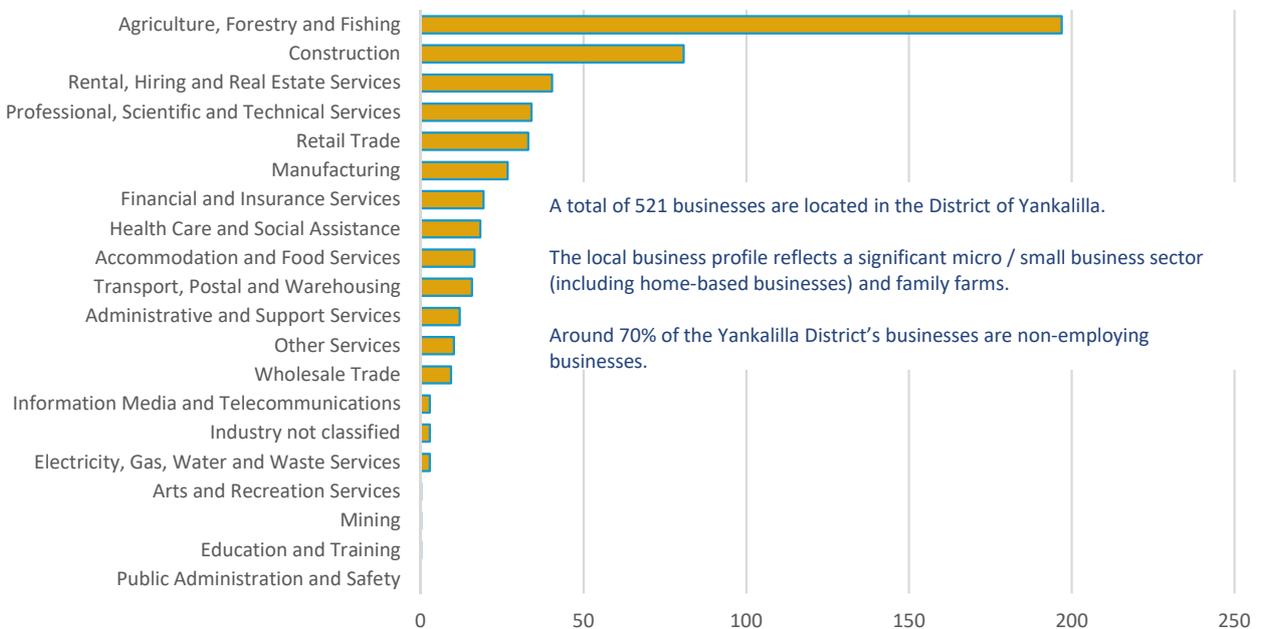
While the Yankalilla district's primary wealth-generating industries are in agriculture, construction and tourism-related activities, the health care and social assistance sector is another significant industry of employment.

Figure 5. Employment by Industry (Jobs by Location), District of Yankalilla, 2017/18



Source: economy.id with interpretations by SC Lennon & Associates

Figure 6. Number of Businesses by Industry, District of Yankalilla, 2018



Source: ABS Counts of Australian Businesses, including Entries and Exits, 2016 to 2018 (Cat. No. 8165.0), with interpretations by SC Lennon & Associates

The district’s manufacturing sector provides for approximately 6% of local jobs and is underpinned by the area’s agricultural and food processing capabilities.

Tourism is a key industry and the Yankalilla District is at the gateway to Kangaroo island, which is a nationally and internationally recognised tourist destination. It offers a full range of outdoor nature-based activities and pursuits, arts and cultural activities and access to world class coastal and natural features. The area’s beaches are amongst some of the best in Australia. The district’s other key sectors of employment include retail trade and the health care and social assistance sector.

Industry Value

In value terms, the Yankalilla district economy is driven by activity in the agriculture, construction, health care and social assistance, rental hiring and real estate, education and training, accommodation and food services and retail trade sectors. As well as

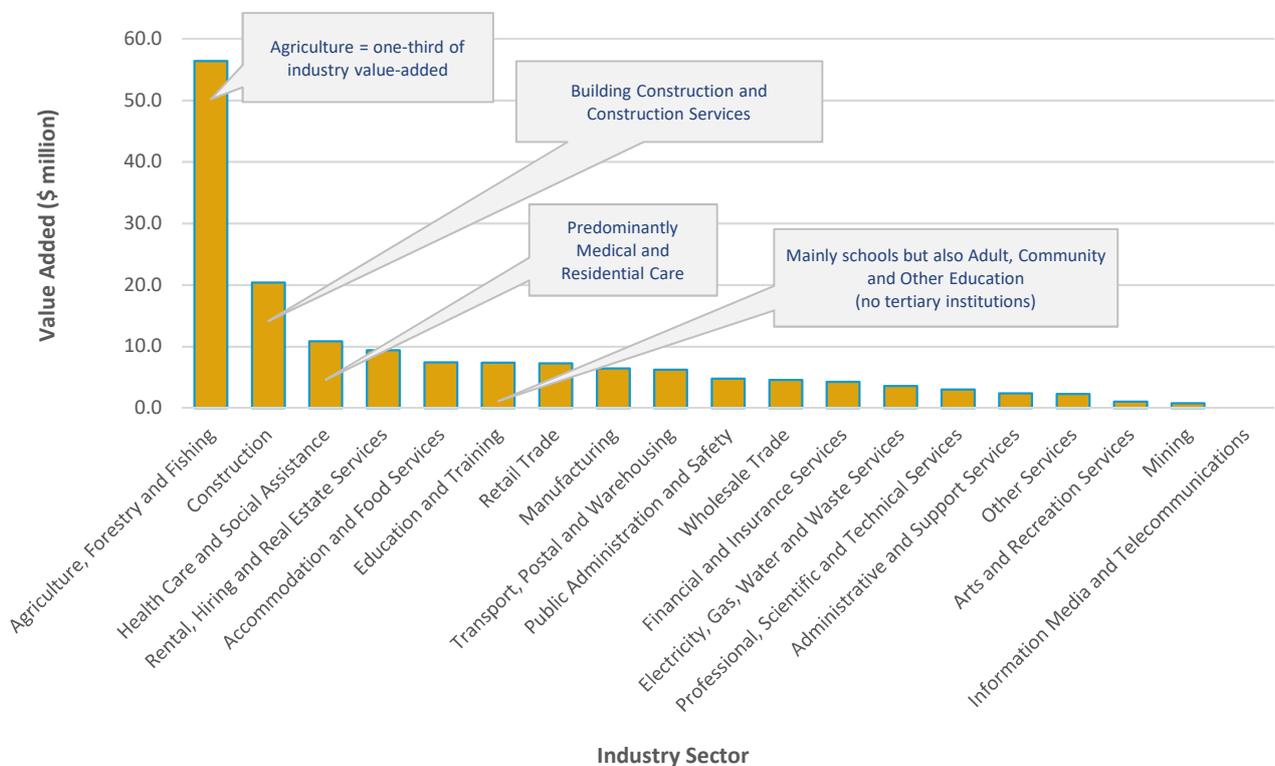
being the area’s largest provider of jobs, the Yankalilla district’s agricultural sector accounts for more than one-third (36%) of total industry value-added, or \$56.4 million. The district is home to forestry activity (State forestry), with the forestry and logging sector accounting for around 16% of all agricultural activity in the district.

The local construction sector generates an estimated \$20.4 million in value-added representing 13% of the Yankalilla District’s total industry value-added.

The health care and social assistance sector, which accounts for approximately 10% of local jobs, generates around \$11 million in value-added to the local economy.

The significance of the district’s visitor economy is evident in the contribution to industry value added made by the accommodation and food services sector and the rental hiring and real estate services sector, which together contribute \$17 million in industry value added or 11% of the total.

Figure 7. Value Added by Industry, District of Yankalilla, 2017/18



Source: economy.id and NIEIR with interpretations by SC Lennon & Associates

The Yankalilla district’s education and training sector accounts for 5% of total industry value added. While there are no tertiary institutions currently located in the area, the district is well-served by local primary and secondary schools as well as community and other education services.

The District’s Employment Capacity

One goal of promoting and facilitating local economic development is to maximise employment opportunities locally, leading to a more sustainable community. ‘Employment capacity’ is a simple way of looking at whether the Yankalilla district could theoretically provide jobs for all its residents if they were to choose to work locally.

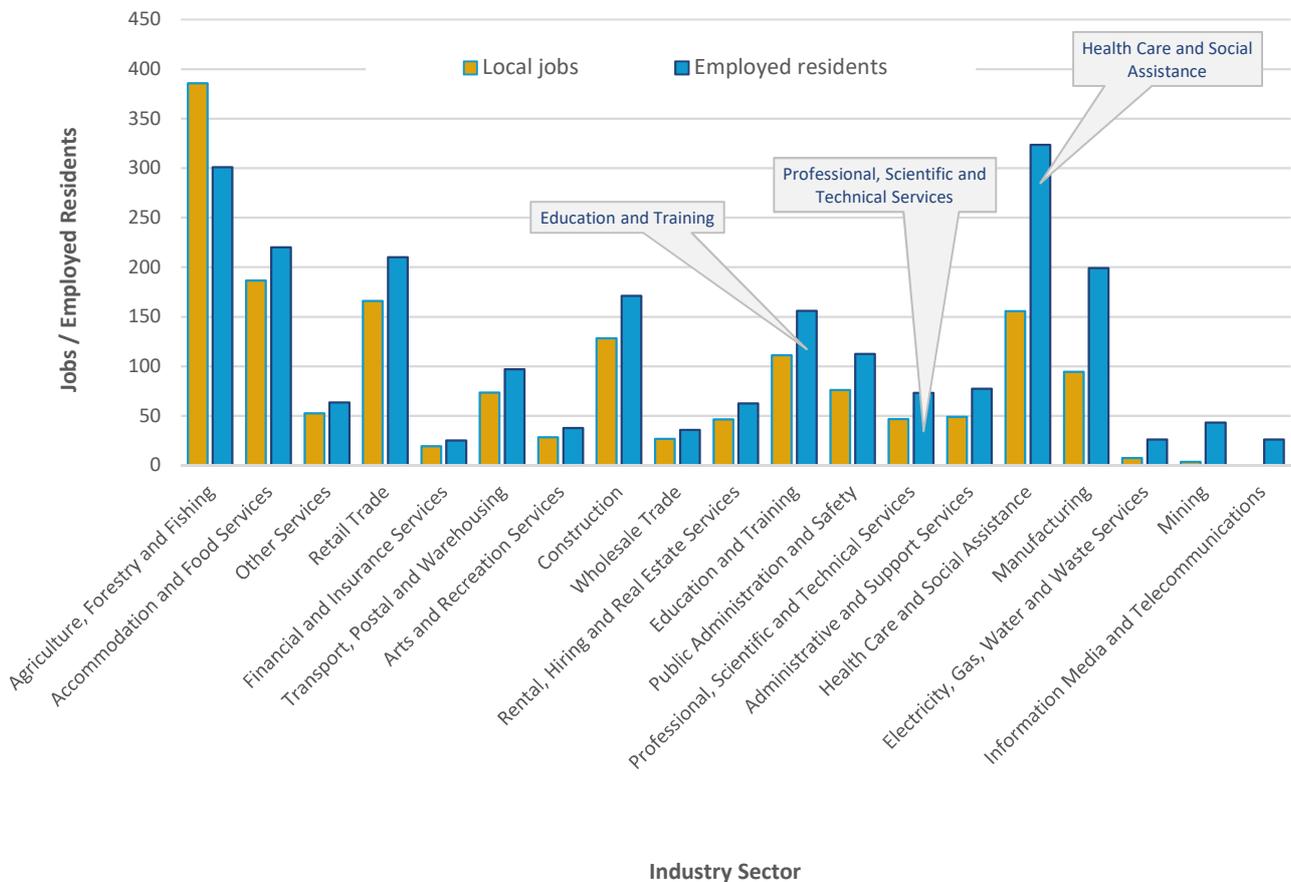
Employment capacity refers to the number of local jobs in an industry, divided by the number of local residents employed (anywhere) in that industry.

A value over 1.0 means there are more jobs available than residents employed in that industry. A number less than 1.0 means there are more residents employed than jobs available in that sector.

This is a theoretical exercise as, even if there are enough jobs provided locally, there will always be some people who choose to commute out of the area.

As illustrated below, the Yankalilla district’s agriculture, forestry and fishing sector is the only industry which provides more jobs locally (in the Yankalilla LGA) than there are local residents who work in that sector. For all other industries, to varying degree, there are more resident workers than there are local jobs in the Yankalilla District, meaning the jobs to resident worker ratios are below 1.0.

Figure 8. Employment Capacity by Industry, District of Yankalilla, 2017/18



Source: economy.id with interpretations by SC Lennon & Associates

Those industries which are close to providing enough jobs locally in line with the number of the district’s resident workers include accommodation and food services (a ratio of local jobs to resident workers of 0.85), other services (0.83), retail trade (0.79) and the financial and insurance services sector (0.77).

As illustrated above, there are a number of sectors which are key industries of employment in the district yet fall short in their capacity to provide employment for locals. This suggests there may be opportunities to fill more local jobs in these industries – tourism-related industries such as accommodation and food services, education and training and the health care and social assistance sector - through concerted workforce planning, investment (people) attraction and skills training initiatives.

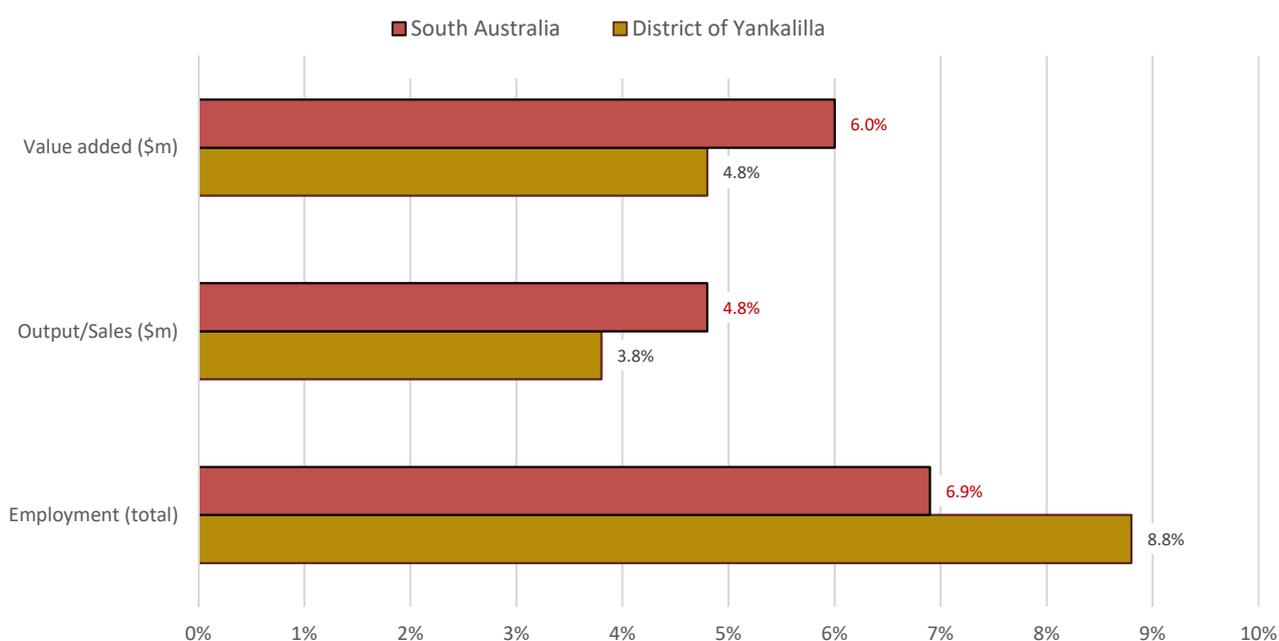
The professional, scientific and technical services sector presents another opportunity to fill local jobs with local people who may otherwise commute to Adelaide for work or business.

The District’s Tourism Profile

The South Australian Tourism Commission reports that South Australia’s visitor economy is at an all-time high, with a value of \$6.8 billion (as at 2018), up over 30 per cent in only 4 years and on track to achieve the State’s \$8.0 billion target by 2020. Nationally, Australia’s tourism industry is performing strongly, with forecast revenue growth of 2% per annum over the next five years (IBISWorld, October 2019). These forecasts must be considered in the context of the recent bushfires and the potential adverse impact on visitor numbers over the foreseeable future.

The value of tourism and hospitality across three key indicators for the Yankalilla district compared to the State average - value-added, output and employment - is illustrated below. The tourism and hospitality sector accounts for a significant 8.8% of total employment in the Yankalilla LGA compared to 6.9% across South Australia. Despite the significance of the tourism industry as a local employer, there is scope to capture more value from tourism spend locally as indicated by the sector’s relative contribution to output and industry value added.

Figure 9. The Contribution of Tourism and Hospitality to Employment, Output and Value Added, District of Yankalilla and South Australia, 2017/18



Source: economy.id and NIEIR with interpretations by SC Lennon & Associates

2.4 Industry Growth and Share

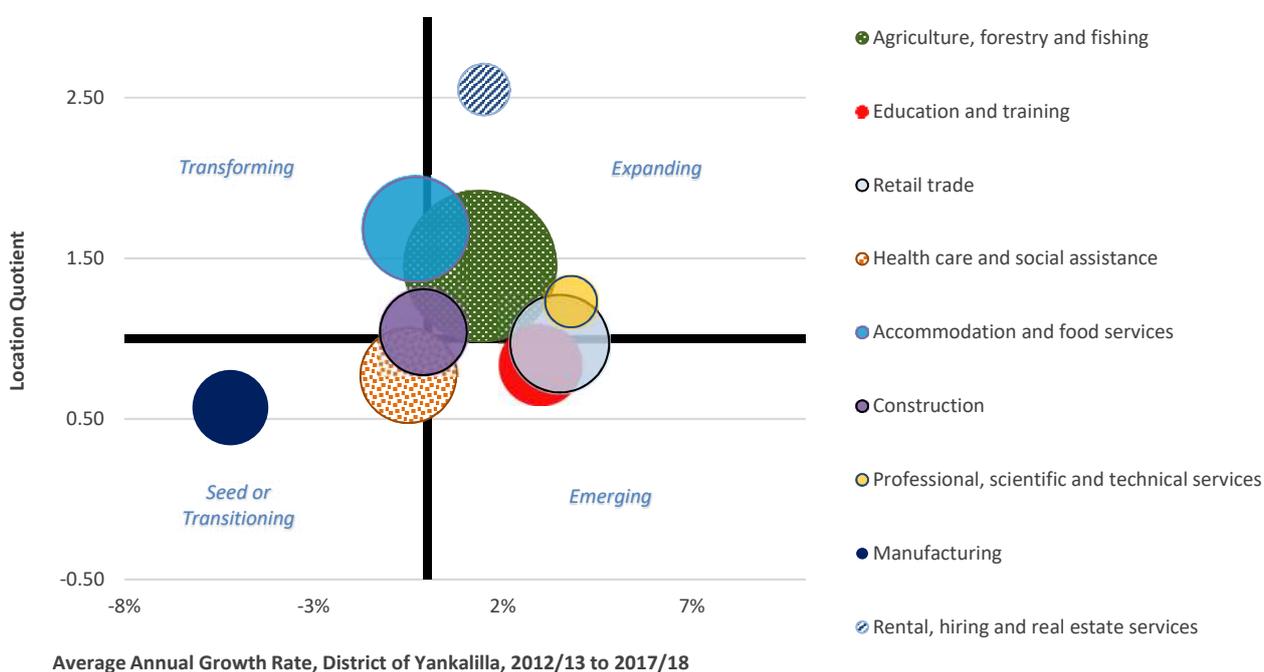
Another means of informing an assessment of how the local economy is evolving and how it could develop, involves an assessment of industry trends and prospects. Figure 10 presents an employment growth-share matrix for selected industries in the Yankalilla LGA.

This shows how each local industry performs relative to regional South Australia as a whole with respect to its relative specialisation, as indicated by its location quotient (LQ)¹, its rate of average annual growth and its size as measured by the number of jobs in that industry sector. Stages in the growth-share matrix are as follows:

- **Expanding:** If in the top right quadrant (high average annual growth/higher than average concentration), this implies a strong, adaptive industry sector, which is good news for local economic development.

- **Emerging:** If in the lower right quadrant (high average annual growth/below average concentration), this is also good news, implying an emerging, growing industry that may need assistance to mature.
- **Transforming:** If in the upper left quadrant (lower than average annual growth/above average concentration), this is not good news, implying the industry is at risk (overall) and needing to increase innovation and productivity to compete with other regions.
- **Seed or Transitioning:** If in the lower left quadrant (lower than average growth/lower than average concentration), this could imply that the industry is neither developed nor growing in the district, or it could also mean that it is a 'seed' industry with potential for growth.

Figure 10. Industry Employment Growth-Share (Selected Industries), Yankalilla District to Regional South Australia, 2012/13 to 2017/18



Source: economy.id and NIEIR with interpretations by SC Lennon & Associates

¹ A location quotient (LQ) shows the percentage of local employment in a particular industry divided by the percentage of the regional SA average that this industry makes up. Where the LQ=1, that industry is exactly as prevalent as in regional South Australia. A location

quotient greater than 1.2 indicates a significant specialisation of the industry in the local area – possibly a key economic strength. Anything over 2 is a major specialisation.

The Yankalilla district’s expanding industry sectors include both the rental, hiring and real estate services and accommodation and food services sectors (together, a proxy for tourism) and agriculture. This is despite the fact that, Australia-wide, the agricultural sector has been experiencing disruption and transformation in recent years.

The district’s small but expanding professional, scientific and technical services sector suggests the area may be growing in appeal as a location for

footloose ‘knowledge-intensive’ workers and businesses.

The Yankalilla district’s emerging industries include education and training, health care and social assistance and retail trade. The district’s manufacturing sector, like manufacturing elsewhere in Australia, is experiencing a period of declining employment as the industry adjusts to structural changes and changing markets.

2.5 The Yankalilla District’s ‘Focal’ Industries

The Yankalilla district’s future economic development will be underpinned by innovation and value-creation in the area’s traditional economic mainstay of agriculture; new investments in industries such as health care, research and

education; nature-based tourism and related industries including sport and recreation, retail and the accommodation and food services sector; and opportunities to attract and grow knowledge-intensive activity in the professional services sectors.

Figure 11. The Yankalilla District’s Economic Drivers



3. Challenges and Opportunities to Promote Prosperity

3.1 A Consultative Approach to Strategy Development

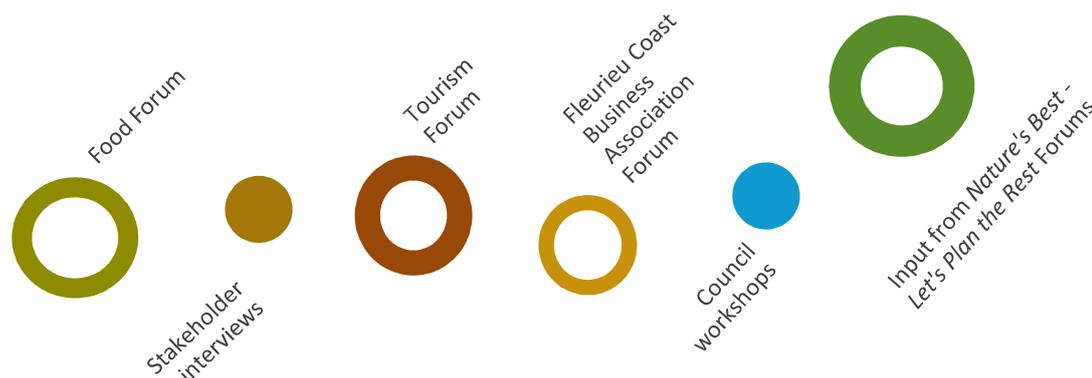
In preparing this Economic Development Strategy, the District Council of Yankalilla consulted with a diversity of government, industry and community stakeholders via a series of business and community forums.

The forums, held throughout late 2019 and early 2020, were organised as part of Council’s biggest ever community consultation program, *Nature’s Best – Let’s Plan the Rest*. The outcomes of these district-wide community forums supplemented the findings

of targeted consultations undertaken to inform this strategy. These consultations included a dedicated Fleurieu Coast Business Association Forum, Fleurieu Coast Food Forum and Fleurieu Coast Tourism Forum, as well as face-to-face and telephone interviews, which were held with selected stakeholders.

The consultant also facilitated a number of workshops with members of Council’s Executive Leadership Team and Councillors.

Figure 12. Economic Development Strategy Consultation Components



The consultations have been instrumental in helping to establish a vision for the economy of the future and to guide Council’s efforts in promoting and facilitating economic development. The

consultations highlighted the Yankalilla District’s strengths and attributes as well as pertinent challenges and opportunities for economic development, which this strategy seeks to address.

3.2 The Yankalilla District’s Attributes, Challenges and Opportunities to Prosper

Lifestyle and Liveability

The Yankalilla district offers a relaxed semi-rural lifestyle and a strong sense of community. Located only an hour and fifteen minutes’ drive from Adelaide’s CBD the district has a comparative advantage defined by its clean and green image, its predictable climate, affordability, natural beauty and

its coastline. Any future development needs to be balanced to ensure the district’s natural environmental attributes are not compromised.

The Yankalilla district’s proximity to Adelaide provides opportunities to access employment as well

as higher-order recreation, leisure and entertainment services and facilities. The area's lifestyle appeal presents an opportunity to attract footloose 'knowledge workers' to the area, such as creative services professionals for example.

While the district's proximity to Adelaide is on the one hand an attribute, the potential for Yankalilla to become another dormitory suburb of metropolitan Adelaide is considered a risk which would compromise the area's attributes and the community's values. In recent years, Myponga in the north has experienced a population influx following new residential subdivisions.

With the exception of a few industries (agriculture and the accommodation and food services sector), there are not enough jobs available in the Yankalilla district to support the local workforce, with a significant number of people travelling outside the district each day to work.

Residential development presents a potential threat to productive agricultural land in parts of the Yankalilla District, highlighting the need for continuing advocacy of State Government on behalf of the local community to ensure productive agricultural land is protected. The district's rural lifestyle and the contribution that agriculture makes to district economy is highly valued by the community.

The Yankalilla district has a relatively high proportion of low-income households. Access to transport services (i.e. public transport connections within the district and to other locations, including Adelaide) is limited.

Transport and Communications

The inadequate standard of some roads has been raised as a factor constraining the district's economic development. A number of roads were identified as being of a sub-par standard creating efficiency constraints for farmers transporting produce and safety issues for residents.

For example, some sections of road that were not gazetted for 26-metre B-double access, and that this

was important for the farming community who need to get supplies and produce in and out efficiently and safely.

The intersection at the Normanville and Cape Jervis Road has been identified by some as a 'blackspot' in need of upgrading. Council has purchased the Normanville service station, presenting an opportunity to master plan the site and the intersection.

The district's hilly topography places limitations on the capacity of telecommunications infrastructure with a number of mobile phone blackspots. These infrastructure shortfalls need to be addressed to support local business activity.

Urban Form and Function

One of Council's roles in supporting local community and economic development (and tourism) is to ensure the district's towns and streetscapes are appealing and inviting. Council has a leadership role to play in the planning and delivery of projects which physically connect people and places to one another, such as passive recreation and leisure spaces where locals and visitors can interact, recreational bicycle paths and end-of-trip facilities as well as guided walkways and linear parks.

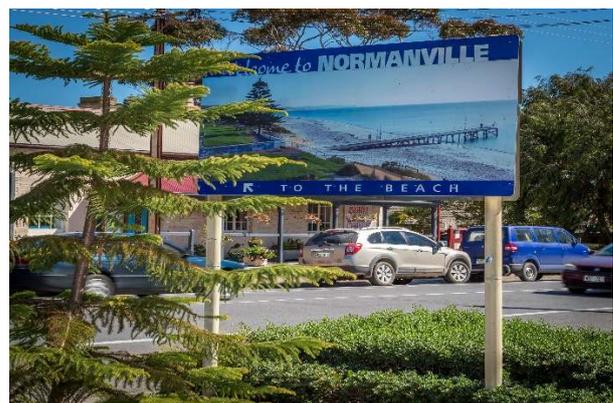


Image: Normanville (source: Neverest Photography)

As the gateway to the Fleurieu Coast, there is an opportunity to enhance the appearance of Myponga through streetscaping and to develop its profile as a tourism gateway. Issues have also been raised regarding the appearance and standard of facilities for locals and tourists alike (e.g. walkways, public

toilets, picnic and barbeque facilities, etc.) at Wirrina Cove and Cape Jervis.

The need for vehicle access to the beach for boat launching at Normanville has also been raised, for both locals and to attract visitors. This requires further investigation to consider the potential impact on the local environment and associated urban planning considerations (road access routes, vehicular movement, parking, landscaping, etc.).

Health and Wellness

The health care and social assistance sector is a significant industry of employment in the District of Yankalilla. Population trends suggest there may be opportunities to explore growth in health and wellness-focussed aged care and retirement living as an industry of the future.

Arts and Culture

The Yankalilla district has a strong arts and culture profile. Opportunities for arts and creative industries, including links to tourism, could be explored, including opportunities to develop currently underutilised facilities (e.g. the Myponga Town Hall) to showcase local arts and culture and to provide a dedicated space for performance and display.

The concept of a culture and learning precinct (including a new library) at the Yankalilla Community Centre has also been raised as an option worthy of further exploration.

Education and Training

The Yankalilla district has a lot to offer but is constrained by a lack of business and industry networking. Community capacity is also important; there is a need to grow the area's social capital and build strength in working together towards a shared vision for economic development.

The district has a lack of tertiary education services and facilities, forcing many young people to leave the area in search of education and employment opportunities. The area suffers from a youth exodus as many younger people move to Adelaide and

elsewhere in search of education and employment opportunities. There is an opportunity for Council and the business community to work together to engage the district's youth, to better understand their needs and desires for the future, to help hold them here, or attract them back to the district.

Perceptions of the quality of local education may pose a constraint to attracting investment. Working with the Education Department and schools to lift the profile of local education can be explored.

Business Engagement and Advocacy

The Fleurieu Coast Business Association (FCBA) has indicated that it would like to develop a stronger relationship / partnership with Council – at both the Executive level and the political level. The FCBA can work with Council to advocate / lobby in the interests of the district's / Fleurieu Coast's business community.



Image: Samoyed Brewery (source: District Council of Yankalilla)

Council can play the role of information-broker for the local business community (on key socio-economic data, business data, information on State and Federal Government grants, etc.). It can also work with the FCBA to better understand business needs (e.g. through regular business surveys).

The need for more appropriately-located light industrial land in parts of the district was raised by some stakeholders. The existing nature and quantum of industrial land could be audited as a starting point to confirm current supply.

Research, Education and Knowledge-Driven Economic Development

There is an opportunity for the District Council of Yankalilla to take a pro-active role in establishing the district as a leader in regenerative agriculture and climate change adaptation via a knowledge-based approach, working in collaboration with education and research institutions, key government agencies and industry.

This approach could also form the basis of a targeted investment attraction strategy. There is scope to engage with research and learning institutions which may look at the Yankalilla district as a location of choice. The district could be a 'test farm' for R&D and the commercialisation of ideas in agribusiness and food technology.

The concept of a knowledge precinct (e.g. in Yankalilla or Normanville) could be investigated, with the infrastructure required (high-capacity digital connectivity) to attract and support knowledge-based industries. Such a precinct could potentially link in with the Lot Fourteen Innovation Neighbourhood at the old Adelaide Hospital site and the Tonsley Innovation District in Clovelly Park south of Adelaide.

The concept was raised, of the District Council of Yankalilla collaborating with neighbouring councils and other key stakeholders (e.g. universities) to explore the potential for a local education hub, to improve access to tertiary education in the area. This could be co-located with like uses such as a library, for example.

Council could invite universities to the district to collaborate on establishing a tertiary education presence, specialising in disciplines that address, for example climate change adaptation including regenerative farming, food technology, alternative energy and environmental science. Opportunities for tertiary education that were raised during the initial consultations include marine science, environmental science, creative industries and international education.



Image: wind turbines (source: Shutterstock)

Wind power has become a significant energy source in South Australia over the past ten years. The Starfish Hill Wind Farm is located across two hills on the tip of the Fleurieu Peninsula near Cape Jervis and was the first wind farm built in South Australia.

The district's clean, green profile and its existing capabilities in renewable energy, coupled with global trends away from fossil fuels to renewable energy sources, suggests that alternative energy generation is an opportunity to explore in the district. This includes, for example, solar energy production and biomass.

Agribusiness and Food Production

The Yankalilla district's economy is driven by activity in the agricultural sector. As well as being the area's largest provider of jobs, the Yankalilla District's agricultural sector accounts for more than one-third of industry value-added.

The district is home to forestry activity (State forestry), with the forestry and logging sector accounting for around 16% of all agricultural activity. The area also has a number of small vineyards/grape producers and berry growers. A lot of farming in the district is small-scale, family-operated farms.

Historically, dairying was the district's dominant economic activity, however, de-regulation of the industry around 15 years ago had a major impact on the sector, which subsequently contracted.

The district of Yankalilla has a sizeable processing sector with the largest industry activity being food product manufacturing. The Fleurieu Milk Company is a large employer operating in Myponga. The Yankalilla District also has a number of beef cattle producers. The district had a meat works (in Normanville) but it closed some years ago.

For the district of Yankalilla, future prosperity lies in clean and green agriculture / agribusiness and regenerative farming.

Regenerative Farming

Regenerative farming refers to a system of farming principles and practices that increases biodiversity, enriches soils, improves watersheds, and enhances ecosystem services. It aims to capture carbon in soil and aboveground biomass, reversing current global trends of atmospheric accumulation.

Regenerative farming is defined by new ways of growing produce more sustainably, supported by transformations in agriculture, underpinned by new

technologies which support the production of higher-value commodities using agricultural technology (ag-tech).

Agricultural Technology

Technological advances are present in relation to precision agriculture or ‘satellite farming’, which involves the use of GPS tracking systems and satellite imagery to monitor stock and/or crop yields, soil levels and weather patterns, to help increase farm efficiency.

‘Ag-tech’, which is being increasingly taken up by the newest generation of farmers, enables them to be more efficient, less wasteful, more productive and more profitable.

In the Yankalilla district, the greater use of technology could be explored, for its potential to help engage younger people considering a career in farming, and to utilise their skills to embed more technology in sustainable farming practices.



Image: Yankalilla District landscape (source: Shutterstock)

The Fleurieu Food Brand

There may be an opportunity to explore development of branded food production in the Yankalilla district and wider region (e.g. high-quality organic produce targeting particular high-value markets). There is a strong link between food and tourism and this needs to be nurtured.

The Yankalilla's district's food producing capabilities can also be promoted amongst the local community, to encourage locals to buy local produce and support the local farming community. The Yankalilla District / Fleurieu Coast needs to 'protect provenance', that is, protect the authenticity of its products and its brand.

Food Processing

A lack of a local abattoir is seen as an opportunity lost to the district. The concept of a community-owned abattoir has been raised as something to explore.

Opportunities to explore game meat farming and processing have been raised in the past (e.g. deer and kangaroos). As a next step, an economic analysis could be undertaken, to determine the potential economic benefits to the district of commercially harvesting kangaroos for example.

Human Capital and Workforce Development

The availability of agricultural skills and succession planning is an issue which could potentially constrain the future of farming in the district.

It has been reported that very few of the younger generation are studying agriculture and many are getting trades, but it does potentially leave a skills gap in terms of agronomy, animal health and husbandry skills.

Rural Land Use Planning

The subdivision of large agricultural holdings for smaller lifestyle blocks / hobby farms has been raised as a concern for the potential impact it has on land management (pests and weeds) and agricultural productivity. Council has an important role to play in this regard. As a first step, it could undertake a rural

lands study to better understand the nature and quantum of rural land holdings in the district to inform future land use planning decisions.

For those farmers who are considering transitioning the use of their land, by moving into horticulture for example, there are potential land use planning limitations which need to be further explored and considered.

Water Security

Water security is an issue facing many farmers in the district and will continue to be an issue in future. Strategies to address water security issues need to be considered.

Roads

The standard of some roads has been identified as a constraint on the district's agricultural sector, with, for example, the poor standard of some gravel roads and overgrown roadside vegetation hindering truck movements and presenting safety concerns.

The inadequate standard of some sections of Inman Valley Road has also been raised as an issue for agriculture.

Agriculture and Tourism

There are potential links between agriculture and tourism, with the potential to capitalise on the Yankalilla district's historical agricultural strengths and capabilities and emerging opportunities in nature-based tourism, and food and wine (and craft beer) tourism. A Fleurieu Coast food trail, for example, could be explored and developed.

There are some perceived and real tensions between the visitor economy / tourism and agriculture. The community has expressed a strong desire to retain what the district has regarding its natural attributes, landscape and environment, which is what attracts people to live, work in and visit the area.

Leveraging Kangaroo Island's Profile to Promote Tourism in the Yankalilla District

The Yankalilla district receives a large number of 'grey nomad' travellers passing through to the internationally-renowned tourist destination Kangaroo Island. While Kangaroo Island has a high national and international profile, the district of Yankalilla's rugged west coast is often overlooked as a tourism asset.

There is an opportunity for the towns of Yankalilla and Cape Jervis to capture more passing trade to Kangaroo Island. The local (Yankalilla district) tourism offer could be packaged and promoted as part of the wider region to target markets, to encourage people to stop, stay and spend in the district.

Australia's cruise ship market continues to grow and in the Fleurieu Coast region, cruise ships anchor at Penneshaw on Kangaroo Island. Sealink, which operates the ferry service between Cape Jervis and Kangaroo Island, transports visitors by bus around the island.

Cruise ships also anchor at Victor Harbour to the east and there is potential for Yankalilla to tap into opportunities associated with visitors coming ashore at Victor Harbour.

Cape Jervis

The Kangaroo Island ferry contract (from Cape Jervis to Kangaroo Island) is operated by Sealink, which provides both passenger and freight services from the jetty at Cape Jervis. The current contract will end in 2024 and the State Government is calling for tenders to operate the service under a new contract after June 2024. Kangaroo Island Connect operates another (lower capacity) passenger transport service between Cape Jervis and Kangaroo Island, from a boat ramp.

The jetty at Cape Jervis is in the process of being upgraded to a standard required until the new contract comes into effect in 2024. However, a longer-term solution is required to ensure Cape Jervis has the capacity to accommodate growing visitor numbers from 2024 onwards. Awarding the new contract (to Sealink or another service provider) will provide security of tenure to allow for a long-term investment in jetty facilities.

A master plan for Cape Jervis has been mooted. Cape Jervis is a fishing town and the area is considered by some to be "run-down" and in need of revitalisation and beautification. A masterplan for the area would need to incorporate an upgrade to the jetty and ancillary facilities. The masterplan proposal presents an opportunity for renewal at Cape Jervis.



Image: Sealink ferries between Cape Jervis and Kangaroo Island (source: Isaac Forman, Serio)

Identifying and Developing New Visitor Markets

The district's visitor economy is limited mainly to day-trippers from Adelaide; tourism is low-value; the district needs to look at ways to move towards low impact-high value tourism and which will attract overnight stays and greater spend (e.g. eco-tourism).

Visitor draw cards like the Smiling Samoyed in Myponga and Forktree Brewing at Carrickalinga (amongst others) bring people into the district. Other opportunities to draw people in and to stay longer in the district need to be explored.

The internationally-renowned Heysen Trail commences in Cape Jervis in the Yankalilla District and extends 1,200 kilometres north through the Flinders Ranges, taking in a diversity of landscapes. The southern section of the Trail in the Yankalilla district, is well-suited to beginners and families with children. Opportunities to capitalise on the Heysen Trail (e.g. visitor accommodation such as eco-lodges) can be explored.

Addressing Seasonality

The Yankalilla district has a large number of holiday homes (e.g. in Normanville) owned by residents of Adelaide who visit in the holiday season or let their homes out to holiday-makers. The seasonality of the district's population, which spikes in the summer months, presents challenges for a number of businesses (e.g. retailers and local service providers).

Tourism in the Yankalilla district is focussed on the beach and the summer months. Opportunities to develop the winter tourism market could be explored.

Local retailers and service providers can identify ways to serve different visitor markets to help grow the local visitor economy, for example, blocking out times specifically for the grey nomad market. Local businesses need to extend trading hours to capture the diversity of visitors passing through the district. Council could explore ways to help incentivise and support local traders in this regard.

Visitor Facilities

Since the Myponga Reservoir has been opened to the public, for recreational use, there are new opportunities for tourism as well as challenges for providing and maintaining support infrastructure that is up to standard (e.g. road access) and managing visitation to the area.

Growing the local visitor economy will require the necessary support infrastructure, including a choice of short-stay accommodation. Opportunities to explore include, for example, RV campsites, overnight camping at the Myponga Reservoir, bed and breakfasts near the Heysen Trail and eco-lodge accommodation targeting high-end, high-value tourists.

There is a 'dump spot' for recreational vehicles (RVs) in Yankalilla. There is potential to develop the district's profile as an 'RV-friendly' accredited area.

Rapid Bay, which is well-known for its limestone quarry and its jetties, which are popular sites for recreational fishing, diving and snorkelling, contains a number of empty houses and strategic sites which could be investigated for their tourism development potential.

Opportunities for Indigenous cultural tourism could be explored and developed in collaboration with Indigenous Elders (e.g. walking trails, bush tucker, quarry performances, etc.). The potential for events tourism could also be explored (e.g. nature-based events).

Destination Management

Tourism is a seven-day a week business and to attract people to stop and stay, the district needs to be known as a place that is open for business.

To attract tourists, the Yankalilla district needs to be recognised as a place that offers outstanding customer service. What is considered by some to be a below par customer service culture is a constraint on the Yankalilla district's tourism and economic development prospects. All stakeholders - retailers, small businesses, Council, the community and

tourism operators - must understand their role in the local visitor economy. Quality customer service and visitor information is key.

While there is a visitor information centre in Yankalilla, it has been suggested that visitors are not getting all of the information they need about things to do in the district. Council could consider complementary or alternative visitor information points, such as in Myponga which is the entry point to the district.

Cape Jervis presents another opportunity for the delivery of visitor information and related services (e.g. historical / cultural heritage interpretation). The feasibility of these and other options would need to be investigated.



*Image: Snorkelling, Rapid Bay
(source: Department for Environment and Water)*

To capture new markets and develop the local tourism sector in a balanced and sustainable manner, a co-ordinated approach to destination management is required. A district-wide destination management plan (DMP) would put in place a plan to promote, support and manage a sustainable approach to tourism development in the Yankalilla district.

Tourism Marketing and Promotion

Tourism promotion requires a concerted effort from local businesses, the community and Council. Consultation feedback suggested that local retailers and service providers could be better educated on their role in the district’s visitor economy and ways they can more effectively market the area to visitors.



*Image: Normanville New Year’s Pageant float
(source: District Council of Yankalilla)*

Council, through the Visitor Information Centre, could offer tourism familiarisation information sessions and tours for local businesses so they are better equipped to promote the district, its businesses and attractions to their customers. Opportunities for staff training could also be explored so that businesses have access to skilled workers who understand the district to provide a quality service offering to visitors.

Each Council in the Fleurieu Peninsula region has its own tourism branding which is potentially confusing to the market. There is scope to rationalise, consolidate and strengthen a regional brand to the benefit of all Councils within the region.

The District Council of Yankalilla could take a proactive role in efforts to consolidate and co-ordinate regional tourism branding in partnership with the region’s other tourism stakeholders.

4. A Roadmap to Prosperity

4.1 The Economic Development Vision and Charter

Prosperous By Nature is informed by socio-economic research and analysis, targeted stakeholder consultation and broader community consultation undertaken throughout the Yankalilla District. The

strategy themes and directions reflect stakeholder views regarding the district's issues, challenges and opportunities for growth, which combined, inform the vision for economic development.

Economic Development Vision for the District of Yankalilla

By 2030, the district of Yankalilla will be a location of choice for innovative and globally-connected 'smart' businesses, organisations and people engaged in a diversity of healthy, sustainable knowledge-intensive activities.

The vision is supported by Council's economic development charter, which describes Council's

commitment to promoting, facilitating and co-ordinating economic development activities.

Council's Economic Development Charter

The District Council of Yankalilla supports economic development through sound planning, information-sharing and service delivery, to help encourage business to flourish and to cultivate the district's appeal as a place to live, learn and prosper.

Through its role as an information-broker, facilitator and coordinator of activities designed to support and promote economic development, the District Council of Yankalilla:

- Prioritises opportunities that build on the district's attributes, capabilities and opportunities in **regenerative farming, food production, health & wellbeing, agribusiness and nature-based tourism**.
- Prioritises initiatives that support **investment in 'knowledge-based' economic activities** including research, education, and the professional, scientific, technical and creative services.
- Engages with the district's **home-based, micro and small-to-medium businesses** to address

shared challenges and opportunities for capacity-building, innovation and investment.

- Undertakes a **partnership approach to tourism development**, working in collaboration with tourism agencies and the industry to enhance branding, marketing, product development, visitor servicing and support infrastructure.
- Plans, prioritises and advocates for **strategic infrastructure** which enables the district's businesses and the community to prosper.

Guided by its economic development charter and the action plan presented in this strategy, Council provides the enabling environment to help facilitate the competitiveness and success of businesses across all sectors of the local economy.

4.2 Economic Development Strategy Themes

The preceding sections of this strategy document challenges and opportunities for the District Council of Yankalilla and its partners in government, the non-government sector, industry and the community to address collaboratively, to help facilitate change towards a prosperous future.

The opportunities are informed by the vision for prosperity and Council’s economic development charter. Prioritising where Council’s resources can best be directed for the purpose of facilitating and promoting economic development is a key consideration of this strategy, which contains three themes as illustrated below.

Figure 13. Prosperous By Nature: Economic Development Strategy Themes



Opportunities for action have been identified and categorised under the three strategic themes. These are opportunities that Council and its partners can focus on to help activate and grow the local economy. Each theme includes:

- **Strategic Objective** – this is a statement setting out what the target outcome is for that theme.
- **Rationale** – this is a statement providing a set of reasons and a logical basis for opportunities identified.
- **Opportunities for Action** – these are the actions to be pursued in order to realise the stated objective.

Some opportunities for action are focused on catalyst project planning and development initiatives which require action combined with a well-planned course of project implementation for the desired

outcomes to be realised while others are focussed on strategic program implementation. These are initiatives that can be addressed as part of Council’s day-to-day economic development planning and facilitation functions in a strategic and informed manner. In a number of cases, these actions seek to build on or continue initiatives already in place.

The majority of the opportunities for action will be Council-led’ in that they involve specific tasks for Council and an allocation of human, physical and financial resources.

Other opportunities for action refer to ‘Council-supported’ activities and these are advocacy or support initiatives where the implementation of the actions is to be led by agencies other than Council.

Each strategy theme is addressed in turn as follows.

4.3 Economic Development Strategy Action Plan

Theme 1: A Location of Choice for Smart and Innovative Food Production and Agribusiness

Strategic Objective

Support the Yankalilla district's continued agricultural evolution, underpinned by the principles and practices of regenerative farming and supported by knowledge-intensive agricultural inputs, processes and support services, to build the district's profile as a leader in smart and innovative food production and agribusiness.

Rationale

Agriculture, which is the district of Yankalilla's traditional economic mainstay, is the principal driver of the district's economic activity. As well as being the area's largest provider of jobs, the Yankalilla District's agricultural sector accounts for more than one-third of industry value-added.

Australia's agricultural sector is constantly evolving and for the district of Yankalilla, future prosperity lies in clean and green 'agribusiness' and regenerative farming, a system which focuses on topsoil regeneration, increasing biodiversity, improving the water cycle, enhancing ecosystem services, supporting bio-sequestration, increasing resilience to climate change, and strengthening the health and vitality of farm soil.

The system of regenerative agriculture, which draws from decades of scientific and applied research in organic farming, agroecology, holistic management and agroforestry, aims to capture carbon in soil and aboveground biomass, reversing current global trends of atmospheric accumulation.

At the same time, regenerative farming also offers increased yields, resilience to climate instability, and higher health and vitality for farming communities. This means the system is ultimately more productive and more profitable than other farming practices, a fact supported, for example, by research undertaken by the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES)

comparing farm incomes and farm input costs per hectare for regenerative farms and all farms.

The District Council of Yankalilla promotes the role of innovation and diversification in driving productivity and future prosperity. Agricultural industry innovation in the district can be facilitated and accelerated through the establishment of a district-wide 'cluster', defined by collaborative partnerships between growers, food and beverage processors, business support service providers, governments, regional development and industry bodies and research and learning institutions.

A key feature of the district's future agricultural activity will be the emergence of new technological innovations, otherwise known as 'ag-tech', as a key production input. The application of new knowledge, coupled with, where applicable, leading edge ag-tech innovations to support regenerative farming practices, will require a collaborative approach.

Without the shared efforts of farmers, it is difficult to achieve proof of concept for new regenerative farming innovations and the use of new technologies to enhance farm productivity.

In this regard, the district of Yankalilla is well-placed, with a number of local farmers already engaged in regenerative farming practices. The District Council of Yankalilla will work with local industry stakeholders, regional development agencies and its partner agencies in government to establish an advisory group to oversee the development of a *Regenerative Agriculture and Food Innovation Strategy* for the district of Yankalilla.

The advisory group (and the strategy) will establish a framework for the establishment and development of a local *Regenerative Agriculture and Food Innovation Cluster*.

Once established, the cluster group will focus on a range of activities to support the evolution of farming in the district for the benefit of the industry and the community at large. This will include:

- Fostering local industry knowledge of regenerative farming practices and the social, environmental and economic benefits that can be generated from regenerative farming;
- Agribusiness innovation and support for small business start-ups;
- The commercialisation of R&D (focussed on research into environmentally-sustainable regenerative agricultural practices);
- Market research;
- Farmer retention and expansion;
- Investment attraction; and
- Agricultural industry workforce planning and development.

Development of the cluster will also support the district of Yankalilla to market itself as a high-quality, clean and green premium food producing district.

Opportunities for Action

- 1.1 Working in collaboration with the district’s farmers, industry bodies, government agencies and the education and training sector, investigate interest in the establishment of a local Agricultural Industry Advisory group to explore the concept of a *District of Yankalilla Regenerative Agriculture and Food Innovation Cluster*.
- 1.2 Collaborate with the Agricultural Industry Advisory Group to acquire funding to appoint an *Agribusiness Support Officer* to oversee the development of a *Regenerative Agriculture and Food Innovation Cluster Strategy for the District of Yankalilla*.
- 1.3 Under the auspices of the Agricultural Industry Advisory Group, prepare a *District of Yankalilla Regenerative Agriculture and Food Innovation Cluster Strategy* and three-year roadmap to guide cluster planning and development. The strategy should focus on

the delivery of services – through the proposed Innovation Hub, to:

- Deliver education and training in regenerative agricultural practices;
- Foster research and development;
- Promote new regenerative farming and related agricultural innovations;
- Support the uptake of new agricultural technologies;
- Identify opportunities for the commercialisation of R&D;
- Provide support infrastructure and services to facilitate local agribusiness start-ups;
- Provide information and support services for current and prospective farmers;
- Support workforce planning and development; and
- Attract investment.



Image: Regenerative agriculture discussion group (source: Chris Day)

- 1.4 Through the *Regenerative Agriculture and Food Innovation Cluster*, commission an economic impact study and business case for commercial game meat farming and processing in the district of Yankalilla.
- 1.5 Collaborate with industry, government agency and education and training partners to commission a *District of Yankalilla Future of Agriculture Employment Study*. The study would research and identify industry trends and the future of work in the food and agribusiness sector, current and emerging

industry skills gaps, the estimated demand for the ‘jobs of the future’ and the district’s likely workforce needs and training priorities.

- 1.6 Initiate and co-ordinate, through the *Regenerative Agriculture and Food Innovation Cluster*, a proposal to partner with TAFE SA, interested universities, local industry stakeholders and the district’s high schools, to design an integrated training pathway for the local school-leavers looking to establish a career in agribusiness.
- 1.7 Commission a *District of Yankalilla Rural Lands Study* to identify an appropriate balance of zoning to accommodate the needs of the district’s key rural land uses including agriculture, industry, biodiversity, tourism, recreation and rural residential, whilst allowing for flexibility and innovation to ensure the potential for future land use conflicts is reduced and to avoid fragmentation of the district’s productive farming land.

- 1.8 Hold a *District of Yankalilla Water Security Summit* to bring together key agricultural industry stakeholders (farmers, Council, government agencies and others) as well as invited experts in water security and water management to articulate a shared understanding of the district’s critical water security issues. Use the summit as a starting point for the identification of potential water security solutions in support of an environmental, social and economically sustainable future for the district of Yankalilla.
- 1.9 Support opportunities for establishing a recognised district of Yankalilla/Fleurieu food product brand to assist the efforts of local producers to develop the area’s profile as a high-quality, clean and green premium food producing district.
- 1.10 Work with the Federal and State Governments to promote and deliver small business support programs applicable to agribusiness in the district of Yankalilla.

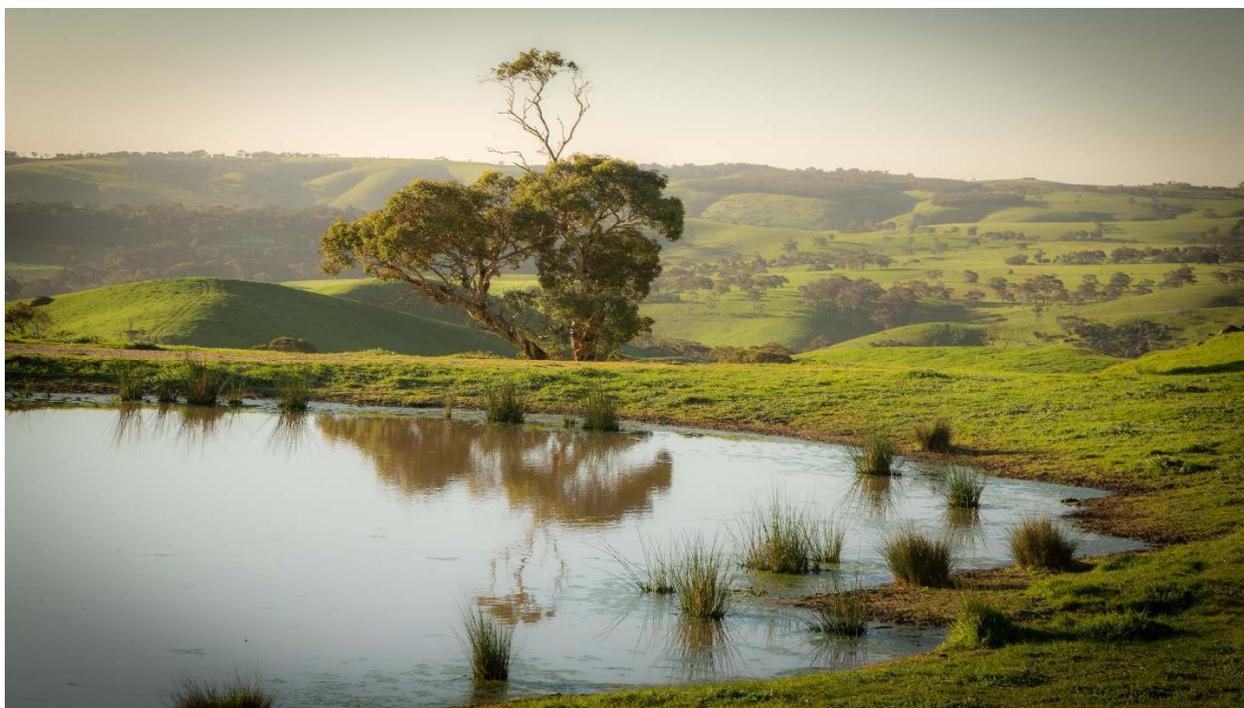


Image: Kemmis Hill Dam (source: Neverest Photography)

Theme 2: A Location of Choice for Business Investment, Learning and Living

Strategic Objective

Consolidate the Yankalilla district's appeal as a location of choice for businesses and for residents who value the area's relaxed coastal rural lifestyle underpinned by a vibrant retail sector, arts and culture, sport and recreation, health care and education and access to quality employment and a diversity of housing.

Rationale

A region's population is one of its most important resources and population change is a significant factor underpinning the long-term economic and social viability of the district.

The District Council of Yankalilla, working in collaboration with other key agents of change, will continue to promote what the area has to offer as a lifestyle location and, importantly, it will back this up with the necessary investments in projects and programs which help to deliver quality infrastructure and support services to local businesses and residents.

The District Council of Yankalilla promotes a 'can-do' attitude to support local business and industry, consistent with the community's values and a collective desire for balanced and sustainable development.



Image: Yankalilla streetscape (source: Shutterstock)

As an information-broker and facilitator, Council is well-positioned to facilitate new business investment with readily-available information on the status of the district economy, industry trends and prospects and locations for investment, including the availability of commercial and industrial land to assist with the crucial decision of site selection.

Council can also help to facilitate the development of business start-ups and small to medium-sized businesses by identifying and keeping abreast of business assistance programs on offer from State and Federal Government agencies.

Central to the needs of business is a skilled and adaptable workforce. Access to skilled labour is influenced by the availability of education and training, levels of workforce participation and the mobility and flexibility of labour. The district's youth needs access to education and training services and facilities with the programs and the infrastructure in place to support their employment aspirations and the requirements of local business and industry.

According to the Australian Bureau of Statistics, the district has a relatively lower number of residents aged 15 years and over with tertiary education qualifications who hold a Bachelor Degree or higher (12%) compared to the State average (19%). Only 11% of the district's residents who attend an educational institution attend a technical or tertiary institution compared to the State average of 23%.

To enhance opportunities for the district's youth to engage in tertiary education, the concept of a *Fleurieu Coast Tertiary Education Network Centre* could be explored. This would be a physical learning hub, much like a business incubator, but providing the district's university students with access to supervised facilities including high-speed internet connectivity, workspaces, tutorial and mentoring support, and a network of like-minded students to create a local 'campus like' environment connected to a network of tertiary institutions.

Infrastructure underpins economic activity and is fundamental to a prosperous community. It includes transport infrastructure, power and water, serviced industrial land and communications.

Digital communications is a fundamental enabler of business innovation and economic development, and the emergence of the digital economy has increased the propensity for individuals and businesses to interact and trade with suppliers, partners and customers from anywhere via the 'Internet of Things'. As a 'lifestyle location', the Yankalilla district is well placed to take advantage of this.

Together with quality physical infrastructure and good digital connectivity, community infrastructure is another fundamental enabler of economic development for the role it plays in facilitating social and economic interaction and exchange. This includes cultural, recreational, leisure and entertainment facilities and services including, for example, libraries, galleries, parks and gardens.

Council is committed to maintaining a standard of infrastructure and services that supports and enhances the liveability of the district. This includes its recreation, leisure and entertainment facilities, its cultural facilities, the quality of its parks and streetscapes and its community services and facilities. Investment in and promotion of these assets is central to supporting the development of the Yankalilla district as a location of choice in which to live, work and play.

Opportunities for Action

- 2.1 Allocate Council funding for the appointment of a business liaison officer or similar position in Council, to act as a first point of contact for local businesses and to advise on such matters as business regulations, planning matters and key Council policies.
- 2.2 Working in collaboration with the Fleurieu Coast Business Association, establish a quarterly *Fleurieu Coast Business Breakfast Forum* with a program of guest speakers on subjects designed to address topical business interests and local priorities.
- 2.3 Collaborate with relevant agencies to facilitate information on and access to State and Federal Government programs which are designed to grow the capacity of new and developing micro and small businesses, including home-based businesses. Provide information and referrals to existing business development and / or mentoring services available through various government programs.
- 2.4 Investigate the business case for a *District of Yankalilla Business Start-up Program and Workspace* to support emerging entrepreneurs to establish and grow their business ideas. As part of the business case investigations, identify potential workspace locations and program funding sources.
- 2.5 Initiate discussions with the State Government, RDA Fleurieu, Adelaide Hills and Kangaroo Island and universities to explore the concept of a *Fleurieu Coast Tertiary Education Network Centre* co-located with a culture and learning precinct, including a new library.
- 2.6 Collaborate with RDA Adelaide Hills, Fleurieu and Kangaroo Island and the State Government to design and implement a web-based district of Yankalilla investor prospectus targeting knowledge-based professional service providers, researchers, educators, scientists and academics by promoting the district's attributes as a place to live, work and operate a business.
- 2.7 Commission a *District of Yankalilla Industrial Land Demand and Supply Study* to confirm existing capacity to accommodate growth and identify any potential anticipated gaps in supply. Confirm priority investigation areas/parcels of land for future industry.
- 2.8 Undertake a survey to identify and prioritise Council-controlled roads in the District Council of Yankalilla requiring upgrades on the basis of safety, conflicting uses (e.g. trucks vs. residents and tourists) and efficiency. Prioritise road upgrades to improve efficiency,

reduce the impacts of heavy vehicles and to improve travel times.

- 2.9 Prepare a ‘*State of the State Roads in the District Council of Yankalilla*’ report and update annually, to support lobbying for improvements in the network and to inform grant funding applications. The report would include an economic impact analysis to demonstrate the costs to the district economy of the standard of the current network and to highlight the economic and community benefits of improvements.
- 2.10 Investigate and document the district of Yankalilla’s potential mobile phone and Wi-Fi blackspot areas.
- 2.11 In consultation with the local community, undertake a land use options study and concept master plan for redevelopment of the Normanville service station site.
- 2.12 Develop partnerships with local communities in the district to facilitate sustainable town centre place activation; identify key project opportunities (e.g. Myponga Town Hall revitalisation) that could form the catalyst for local community-Council partnerships.
- 2.13 Consider in Council’s capital works program, streetscape improvements to enhance the visual appeal of the district’s retail/commercial precincts.
- 2.14 Investigate interest from retail traders to participate in facilitated ‘retail inspiration’ workshops and similar events with leading experts/guest speakers to promote best-practice visual merchandising, branding and customer service to support the vitality and growth of the district’s retail centres.
- 2.15 In collaboration with government and industry stakeholders, advocate a *District of Yankalilla Waste Management Strategy* based on the principles of the ‘circular economy’ (reduced use, re-use, recycle) and waste food reprocessing initiatives. Work with local traders in the district’s retail precincts to include a ‘plastics free’ component.



Image: Wirrina Cove (source: Neverest Photography)

Theme 3: A Destination of Choice for Nature-based Tourism

Strategic Objective

Position the district of Yankalilla as a vibrant destination for visitors offering a diversity of cultural, natural, leisure based and sporting experiences with new investment creating quality jobs and visitation growth equivalent to at least the State average.

Rationale

The district of Yankalilla's tourism sector is an emerging driver of economic activity and employment. By undertaking a strategic, informed and targeted approach to tourism promotion and destination management, tourism has the potential to be a pillar of the district's future prosperity.

Regional Australia's visitor economy is on an upward trajectory and in the District Council of Yankalilla, where tourism accounts for 9% of employment (compared to a State-wide average of 7%), local natural comparative and competitive advantages are yet to be fully capitalised upon.

If opportunities for tourism product development, destination management, promotion and resourcing are addressed, the district of Yankalilla is poised to develop its profile as a premier regional visitor destination.

The district's visitor economy is currently limited mainly to day-trippers from Adelaide; tourism is low-value and is focussed on the beach and the summer months. The district needs to look at ways to move towards low impact-high value tourism and which will attract overnight stays and greater spend (e.g. eco-tourism). Visitor draw cards like the Smiling Samoyed Brewery in Myponga and Forktree Brewing at Carrickalinga bring visitors to the district. Other opportunities to draw people in and to stay longer need to be explored.

The Yankalilla district is at the gateway to Kangaroo island, which is a nationally and internationally recognised tourist destination. It offers a full range of outdoor nature-based activities and pursuits, arts

and cultural activities and access to world class coastal and natural features. The area's beaches are amongst some of the best in Australia. While Kangaroo Island has a high national and international profile, the district of Yankalilla's rugged west coast is often overlooked as a tourism asset.

There are potential links between the district's agricultural sector and tourism, by capitalising on local historical agricultural strengths and capabilities and emerging opportunities in nature-based tourism, as well as food and wine (and craft beer) tourism.

Vibrant, diverse and engaging events bring communities and people together. They provide visitors with a reason to travel and stay, bringing significant economic and social returns. There is opportunity to further develop events that reflect the attributes of the district and are thoughtfully shaped to support local business i.e. Festival Fleurieu, Festival of Nature.

There is an opportunity for the towns of Yankalilla and Cape Jervis to capture more passing trade to Kangaroo Island. The local (Yankalilla district) tourism offer could be packaged and promoted as part of the wider region to target markets, to encourage people to stop, stay and spend in the district.

The jetty at Cape Jervis is in the process of being upgraded to a standard required until the new ferry contract comes into effect in 2024. Beyond that, a solution is required to ensure Cape Jervis has the capacity to accommodate growing visitor numbers from 2024 onwards. Awarding the new ferry contract (to Sealink or another service provider) will provide security of tenure to allow for a long-term investment in jetty facilities.

A master plan for Cape Jervis has been mooted and this would need to incorporate an upgrade to the jetty and ancillary facilities. The masterplan proposal presents an opportunity for renewal at Cape Jervis.

Growing the local visitor economy will require the necessary support infrastructure, including a choice of short-stay accommodation. Opportunities to explore include RV campsites, overnight camping at the Myponga Reservoir, as well as eco-lodges, bed and breakfasts or glamping facilities near the Heysen Trail targeting high-end, high-value tourists.

In order to capture new markets and develop the local tourism sector in a balanced and sustainable manner, a co-ordinated approach to destination management is required. A district-wide destination management plan (DMP) would deliver a plan of action to promote, support and manage a sustainable approach to tourism development in the Yankalilla district.

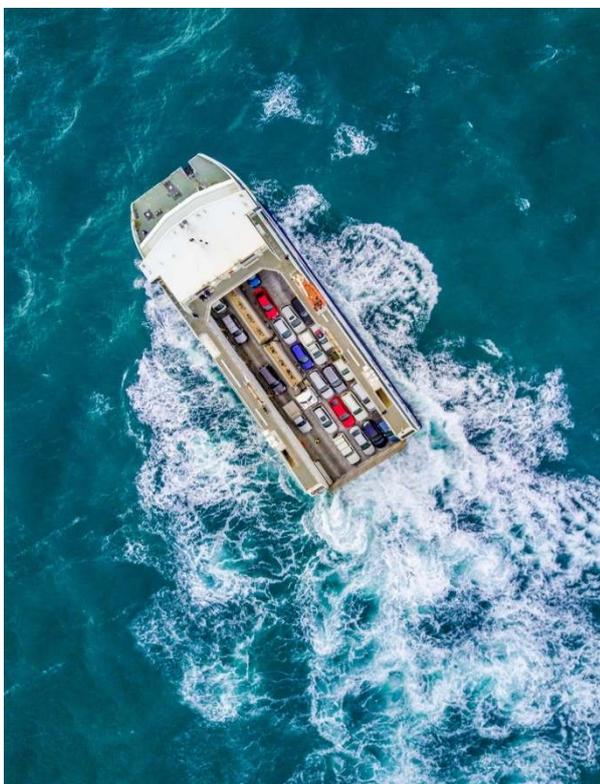


Image: Sealink ferry (source: Isaac Forman, Serio)

A DMP should address matters concerning critical visitor economy infrastructure (e.g. signage, roads, telecommunications, visitor accommodation), information and marketing, the (built and natural) environment and governance / regional tourism partnerships.

Each Council in the Fleurieu Peninsula region has its own tourism sub-branding which is potentially confusing to the market. There is scope to rationalise, consolidate and strengthen the regional brand to the benefit of all Councils within the region. The District Council of Yankalilla needs to take a pro-active role in efforts to consolidate and co-ordinate regional tourism branding in partnership with the region's other tourism stakeholders.

Opportunities for Action

- 3.1 In partnership with the various landholders/agencies, advocate for the development of a Cape Jervis Masterplan to guide development of the jetty precinct and surrounds to revitalise the area by encouraging more activity and expenditure from visitors travelling to and from Kangaroo Island.
- 3.2 Prepare a concept plan/tourism master plan for the development of the Myponga township precinct.
- 3.3 Support the implementation of the Wild South Coast Way on the Heysen Trail, through facilitation of commercial opportunities for industry such as accommodation, food and beverage, guided walks and logistical components including transport and shuttle services, portage and equipment hire.
- 3.4 Working with regional partners, investigate opportunities for the district of Yankalilla to cater for cruise ship visits, including advocating for regional infrastructure and developing onshore experiences.
- 3.5 Commission the preparation of a *District of Yankalilla Destination Management Plan* to address matters concerning critical visitor economy infrastructure - signage, roads, telecommunications, visitor accommodation, information and marketing, the (built and natural) environment and governance/regional tourism partnerships.

- 3.6 Review the Yankalilla district's Visitor Information Centres (VICs). Undertake a review of current operations and potential new operations, having regard for the need for Council resources and assets devoted visitor information service delivery to be used effectively for maximum benefit, and in light of ongoing changes affecting how visitor information is managed and delivered.

- 3.7 Review existing community festivals and events (including sporting, music and cultural festivals) and identify opportunities for existing and emerging events throughout the district of Yankalilla and surrounding Fleurieu Peninsula region to become part of a coordinated calendar of events.
- 3.8 In collaboration with Fleurieu Peninsula Tourism, local producers, accommodation providers and others working in tourism space, explore the concept of a Fleurieu Coast farm gate food trail.
- 3.9 Develop a guideline for the district's hospitality businesses to improve levels of service addressing issues such as shopfront presentation, visual merchandising, customer service training for staff and hours of operation.
- 3.10 Working in collaboration with the Fleurieu Coast Business Association, develop and promote a customer service strategy/campaign for the district's retail, food and hospitality businesses, targeting both traditional and non-traditional tourism businesses, to facilitate a consistent, quality visitor experience.
- 3.11 Investigate the means by which the District Council of Yankalilla can facilitate access to business support and training resources in the tourism sector, leveraging State and Federal Government programs where available.
- 3.12 Promote the district of Yankalilla as being 'RV-friendly' in all marketing material.
- 3.13 Formalise working relationships with neighbouring Councils, RDA Adelaide Hills, Fleurieu and Kangaroo Island, Fleurieu Peninsula Tourism and the South Australian Tourism Commission to explore and agree on a shared, consistent regional destination branding.
- 3.14 Design and implement a district of Yankalilla/Fleurieu Coast post-experience visitor survey program to improve awareness and understanding of visitor experiences and needs and to better target marketing resources.
- 3.15 Liaise on an ongoing basis with State and Federal funding agencies and monitor grants programs. Ensure that business cases for priority tourism projects are at the ready.



Image: Normanville Jetty (source: SC Lennon & Associates)

5. Strategy Implementation Framework

5.1 Informing Prioritisation of Opportunities for Action

Effective implementation must be cognisant of available resources and the capabilities of Council to progress the opportunities identified. To allow for effective implementation over time, the opportunities presented in this strategy have been prioritised.

The prioritisation of actions to support the Yankalilla district’s economic development is guided by two broad sets of assessment criteria – **benefits realisation** and **capacity to implement**.

Benefits Realisation:

- What **benefits** will the opportunity deliver to the Yankalilla district’s residents and businesses if realised?
 - Will it bring more business investment to the District of Yankalilla and is it the sort of investment we want?
 - Does it build on the district’s existing industry profile, capabilities and competitive advantages?
 - Will it help to create more jobs in key and emerging industry sectors such as food and food products, health, education and the visitor economy?
 - Will it help to reduce leakages and retain and re-circulate more income in the district?
 - Are there other potential impacts (e.g. social, environmental, cultural) to consider?

Capacity to Implement:

- What is the District Council of Yankalilla’s **capacity to implement** the project or activity?
 - Is it consistent with the community’s vision and values?
 - Is it consistent with Council’s land use planning and policy objectives?
 - Does Council have the organisational capacity to implement the project?

- Does Council have the financial resources and the human resources?
- Is the necessary support infrastructure available (or can it be realistically built/accessed?)
- Implementation - who is best placed to drive the opportunity? Is it Council as the lead, as a partner or is it the responsibility of other organisations with support from Council?

Figure 14. Economic Opportunity Assessment Matrix



Source: SC Lennon & Associates

Strategy implementation priorities are identified through the application of these broad set of assessment criteria, determining to what extent the opportunity in question concerned is a higher, medium or lower priority.

Applying the assessment criteria and effectively ‘rating’ and ‘ranking’ each action determines those that are considered the highest priority and which, as a result, are short-term actions to be progressed over the first 12 to 24 months.

5.2 Priority Actions

Priority projects and activities for implementation are identified based on the application of the broad set of assessment criteria described above.

Some opportunities are focused on *catalyst project planning and development initiatives* which require action combined with a well-planned course of project implementation for the desired outcomes to be realised over time. Others are focussed on *strategic program implementation* and are initiatives that can be addressed as part of Council's day-to-day economic development planning and facilitation functions. In a number of cases, these actions seek to build on or continue initiatives already in place.

From the long-list of actions identified, the following twelve are the priorities to be progressed over the first 12 to 24 months of this strategy:

Strategic Program Implementation:

- Allocate Council funding for the appointment of a business liaison officer or similar position in Council, to act as a first point of contact for local businesses and to advise on such matters as business regulations, planning matters and key Council policies (Action 2.1).
- Working in collaboration with the Fleurieu Coast Business Association, establish a quarterly *Fleurieu Coast Business Breakfast Forum* with a program of guest speakers on subjects designed to address topical business interests and local priorities (Action 2.2).
- Collaborate with relevant agencies to facilitate information on and access to State and Federal Government programs which are designed to grow the capacity of new and developing micro and small businesses, including home-based businesses. Provide information and referrals to existing business development and / or mentoring services available through various government programs (Action 2.3).
- Commission a *District of Yankalilla Rural Lands Study* to identify an appropriate balance of zoning to accommodate the needs of the district's key

rural land uses including agriculture, industry, biodiversity, tourism, recreation and rural residential, whilst allowing for flexibility and innovation to ensure the potential for future land use conflicts is reduced and to avoid fragmentation of the district's productive farming land (Action 1.7).

- Undertake a survey to identify and prioritise Council-controlled roads in the District Council of Yankalilla requiring upgrades on the basis of safety, conflicting uses (e.g. trucks vs. residents and tourists) and efficiency. Prioritise road upgrades to improve efficiency, reduce the impacts of heavy vehicles and to improve travel times (Action 2.8).
- Commission the preparation of a *District of Yankalilla Destination Management Plan* to address matters concerning critical visitor economy infrastructure - signage, roads, telecommunications, visitor accommodation, information and marketing, the (built and natural) environment and governance / regional tourism partnerships (Action 3.5).

Catalyst Project Planning and Development:

- Working in collaboration with the district's farmers, industry bodies, government agencies and the education and training sector, investigate interest in the establishment of a local Agricultural Industry Advisory group to explore the concept of a *District of Yankalilla Regenerative Agriculture and Food Innovation Cluster* (Action 1.1).
- Collaborate with the Agricultural Industry Advisory Group to acquire funding to appoint an *Agribusiness Support Officer* to oversee the development of a *Regenerative Agriculture and Food Innovation Cluster Strategy for the District of Yankalilla* (Action 1.2).
- In consultation with the local community, undertake a land use options study and concept

master plan for redevelopment of the Normanville service station site (Action 2.11).

- In partnership with the various landholders/agencies, advocate for the development of a Cape Jervis Masterplan to guide development of the jetty precinct and surrounds to revitalise the area by encouraging more activity and expenditure from visitors

travelling to and from Kangaroo Island (Action 3.1).

- Prepare a concept plan / tourism master plan for the development of the Myponga township precinct (Action 3.2).
- Support implementation of the Wild South Coast Way on the Heysen Trail, through facilitation of commercial opportunities for industry. (Action 3.3).

5.3 Cultivating Collaborative Partnerships for Effective Implementation

This Economic Development Strategy will be implemented by the District Council of Yankalilla in partnership with the South Australian Government, the Australian Government, regional development bodies, peak industry bodies, the Fleurieu Coast Business Association, the district's and wider region's education and training providers and other supporting partners across the region.

Council will organise a dedicated *Yankalilla District Economic Development Futures Forum* to re-affirm and build on the district's economic development

directions and priorities as articulated in this strategy. This will include the review, update and prioritisation of strategies and actions and will involve Councillors, Executive Leadership Team members and invited external stakeholders.

The Yankalilla district's businesses and residents will continue to be engaged at a partnership level to ensure effective communication on the progress of strategy implementation and commitment to realising Council's and the community's economic development agenda.

5.4 Monitoring Economic Development Strategy Progress

This strategy has been prepared in the context of the role of economic development in Council's broader program of work and strategic objectives, and wider regional priorities.

Council will monitor the progress of the Economic Development Strategy in order to achieve the actions set out. Set performance measures have been established using a range of indicators, including both 'output' indicators and 'outcome' measures.

Targets set out in this strategy will be monitored through the following methods and sources:

- Regular (annual) business confidence surveys;
- Customer / visitor satisfaction surveys;

- Subscription to regularly updated and tailored data sources such as profile.id and economy.id;
- Department of Education, Skills and Employment data on unemployment and labour force trends;
- Australian Bureau of Statistics (ABS) Census data; and
- ABS Business Register data.

The set performance measures will be reported annually.

Prosperous By Nature: Economic Development Strategy for the District of Yankalilla 2020-25 will be reviewed annually with an update anticipated in five years.

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Appendix A – Stakeholder Consultations

Stakeholder Organisations Consulted

- District Council of Yankalilla
- Fleurieu Coast Business Association
- Government of South Australia, Department for Innovation and Skills
- Government of South Australia, Department of Planning, Transport and Infrastructure
- Government of South Australia, Department of Primary Industries and Regions
- Government of South Australia, Department of Trade, Tourism and Investment
- Regional Development Australia (RDA) Adelaide Hills, Fleurieu & Kangaroo Island
- South Australian Tourism Commission
- Southern and Hills Local Government Association

Consultation Forums and Sources

- District of Yankalilla Township Forums (November and December 2019):
 - Cape Jervis
 - Inman Valley
 - Myponga
 - Second Valley
 - Yankalilla, Normanville and Carrickalinga
 - Wirrina Cove
- District of Yankalilla School Forums (November 2019):
 - Myponga Primary
 - Rapid Bay Primary
 - Yankalilla Area School
- District of Yankalilla Industry Panel Events:
 - What’s the Future of Farming in Our District? (January 2020)
 - What’s the Future of Jobs, Business and Tourism in Our District? (February 2020)
- Fleurieu Coast Business Association Forum (1st October 2019)
- Fleurieu Coast Food Forum (19th September 2019)
- Fleurieu Coast Tourism Forum (22nd September 2019)
- Stakeholder interviews - face-to-face and telephone (July 2019)

