



Economic Development Plan

Clare and Gilbert Valleys Council

For:

Clare & Gilbert Valleys Council

RDA Yorke & Mid North

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KPPM Strategy

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Clare & Gilbert Valleys Economic Development Plan

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Executive Summary

This Economic Development Plan for the Clare and Gilbert Valleys is a collaboration between the Clare & Gilbert Valleys Council and Regional Development Australia Yorke & Mid North (RDA YMN). The aim of the Plan is to understand economic processes in the Council area (as it sits within the broader region, state and global economy), and determine actions by Council and its partners that accelerate economic growth.

Dr Kristine Peters (KPPM Strategy) and Professor Andrew Beer (University of South Australia) were engaged to work with Council and the RDA YMN to produce the Economic Development Plan, which also reflects input by industry leaders and business owners across the Clare and Gilbert Valleys district. While the key focus of this Plan is activity over the next three years, it is important that the Plan is a 'living document' that is adjusted as tasks are achieved or new conditions become apparent.

To a large degree, geography and demography influence how economic development is addressed. While primary industries are the traditional economic base for the district, future economic growth will rely on greater economic diversity – particularly strengthening of hospitality, service and retail offerings. The district is fortunate in having a large service centre in Clare, and the development and vibrancy of Clare needs sustained focus. Smaller towns and settlements are equally important, but economic development interventions in smaller centres are less likely to have a significant impact on the economic growth of the entire district, and the focus in these smaller centres is on filling empty shops, main street amenity and stimulating new business.

While primary industry underpins the regional economy and there are a number of direct and indirect actions that will support the agricultural and viticulture sector, the growth potential of tourism presents immediate opportunity for the Clare Valley Tourism region. The broader tourism economy - which includes any business that directly or indirectly benefits from tourism - supports economic diversification, creates new jobs in non-traditional sectors, and provides a stimulus for innovation and enterprise. A diverse and vibrant economy that provides exciting local careers, market demand for new businesses, and evening and weekend activation also benefits social and community wellbeing. For this reason, tourism (which encompasses the wine and food sectors) features strongly in this Plan.

In recent decades, the grape and wine industry has been a strong economic catalyst in Clare and Gilbert Valleys. The international success of Clare Valley wines and the corresponding visitor and investor attention have been - and will be - important to economic growth. A factor in the success of this sector is strong networks and collaborations within the industry, which has the vision and capacity to drive its own future, hence this Plan does not duplicate the efforts of the grape and wine industry.

The focus of this Economic Development Plan is on actions that are best initiated by local government (via the Clare & Gilbert Valleys Council and regional local government partnerships), by regional development agencies (RDA Yorke & Mid North), and by connecting with industry leaders around specific initiatives.



Clare & Gilbert Valleys Economic Development Plan

Contents

Acknowledgements	
Executive Summary	i
Introduction	1
Who does what?.....	1
Context	2
Framing plans.....	2
Macro economic trends	4
A tapestry of villages	6
Capacity.....	7
Human capital.....	7
Business dynamics.....	9
Amenity and ambition.....	9
Wine and food	11
Agriculture	12
Health and wellbeing.....	13
Tourism	14
Planning and zoning	16
Business priorities.....	17
Objectives.....	18
The Strategy	19
A: Strategies that can be delivered with existing resourcing.....	20
B: Strategies that require additional resourcing.....	22
Implementation timeline.....	24
References	25
Attachments.....	27
Headline data.....	27
Census.....	27
RDA YMN Business Survey 2018.....	36
Mid community.....	36
RDA YMN Roadmap actions	37
Survey responses: Business attraction and investment	38
Peter Ellyard’s workshop: CGV preferred future 2030.....	39
Spendmapp.....	42



Introduction

This Economic Development Plan is an initiative of Regional Development Australia Yorke & Mid North for the Clare & Gilbert Valleys Council – to be delivered by Council in partnership with the RDA, Legatus Group and the Clare and Gilbert Valleys community.

The Plan has been informed by the business community - through a survey by RDA YMN of 60 businesses in the Council area; by sector leaders - via a workshop that identified trends, issues and opportunities; and by Clare & Gilbert Valley Elected Members.

Census and other data have been considered, with key indicators included as attachments. These indicators will provide a baseline for assessing the impact of the Economic Development Plan in years to come.

Economic Development is an inexact science, but we know that vibrant, diverse communities generate innovation that in turn results in entrepreneurship, business investment and jobs. External factors also influence regional economies, and assessment of the effectiveness of economic development activity should always take these factors into account.

A good Economic Development Plan will apply leverage through targeted activities that make the greatest difference in generating economic and employment growth - the Strategy section of the Plan sets out these 'leverage activities', together with responsibility for driving each initiative, and measures to assess whether outcomes have been achieved.

Who does what?

Successful economic development is not a 'stand alone' activity, the best outcomes are achieved where partners build economic development into their core business, and partner to leverage economic development resourcing and initiatives.

Council	Embed economic development in core business: Planning, infrastructure and assets, regulation, policies, main streets, attract/welcome new residents, community grants, knowledge hubs (libraries, VICs)
RDA YMN	Big picture, regional leverage, business support: Skills development, tourism development, export ready, industry attraction and development, business advice
Other partners	Support the delivery of the plan through partnerships and shared initiatives



Context

The Clare and Gilbert Valleys district is a short drive from Adelaide and enjoys scenic and productive lands that support viable primary production, enviable amenity for residents and visitors, and enticing tourism experiences.

The district's Gross Regional Product was \$590m in the year ending June 2017, growing 6.0% since the previous year (*see .id community* attachment for historical GRP).

The district is both a tourist destination in its own right (Clare Valley Tourism Region) and an important route to the Flinders Ranges and Outback tourism regions.

Clare and Gilbert Valleys form part of the traditional lands of the Kurna and Ngadjuri peoples.

Framing plans

The Clare & Gilbert Valley's *Strategic Plan 2020* sets out its first priority as "an exceptional quality of living for all, with opportunities available for people of all ages and abilities". Priorities within the *Strategic Plan 2020* reflect community strengths and a progressive attitude toward economic development:



- Strong community leadership and an active and engaged volunteer sector
- A vibrant arts and cultural sector where creative people thrive and residents and visitors can enjoy visual arts and performance
- A warm and welcoming local area with a rich rural identity
- Sustainable land use development, affordable, appropriate and accessible housing
- Distinctive heritage buildings are protected and celebrated
- Agricultural practices are sustainable and ecologically friendly
- Internationally recognised for its high quality, niche products and services attracting investment and talent
- The business environment is supportive and assists a variety of economic sectors and workforces: local businesses are progressive, innovative and successful; employment and training opportunities are available
- High-speed communications connect businesses, residents and visitors
- Bicycle and walking trails are connected, accessible, safe and attractive

Clare & Gilbert Valleys Economic Development Plan

The Yorke & Mid North's *Regional Roadmap 2018-2028*, provides an overarching view of the broader region, with the key aspirations being:

- Leaders in technology
- Service levels are maintained or grown
- Great infrastructure
- Celebrate a growing and diverse population
- A 'can do' culture



To achieve these aspirations, the Yorke and Mid North Regional Alliance (RDA YMN, regional group of Councils (Legatus Group) and the Northern & Yorke Natural Resources Management Board) has identified a number of actions (see attachment *RDA YMN Roadmap actions*) that have been considered in the development of the *Clare & Gilbert Valleys Economic Development Plan* to ensure that broader initiatives are reflected in the specific actions of this Plan.

Many State Government plans also incorporate the Clare and Gilbert Valleys district (e.g. Regional Health Plans, Natural Resources Management Plans). Aspects of these plans have been reflected in this *Economic Development Plan* where relevant.

Apart from Council and RDA plans, the most influential planning for economic development in the Clare and Gilbert Valleys district relates to the Tourism industry. The Gross Regional Product (GRP) for tourism in Clare & Gilbert Valleys has not been calculated (most measures relate to the Clare Valley Tourism Region, which generated \$96m in 2016), although it can reasonably be assumed that tourism comprises a significant proportion of the 27.2% GRP generated by Agriculture (including viticulture), and the majority of GRP in Accommodation and Food & Beverage Services (4.1%) (GRP data provided by RDA YMN).

While manufacturing (10% in 2016/17, down from 18% in 2006/7) and Health Care and Social Services (7.5%, up from 6.6% in 2006/7) make a strong contribution to the GRP, tourism - particularly international tourism - has the potential to generate exponential growth through investment in product, service and marketing and spend – and it is therefore a focus for economic development. Tourism also contributes to local amenity through cafes, cultural activities and vibrancy, and provides jobs and career opportunities that assist with youth retention.

Clare Valley SATC *Regional Visitation Strategy*, which sets out the region's vision as:

Clare Valley offers the quintessential Australian experience. Our geographical market proximity to the Outback, Ocean, River and Adelaide CBD positions Clare Valley as the rural hub for tourism in Northern South Australia.



To be delivered via the following priorities:

- Establish six star boutique accommodation



Clare & Gilbert Valleys Economic Development Plan

- Build commissionable hero experiences which are best in class
- Work with SATC to market the Clare Valley to the active and indulgent segment
- Build international market exposure to NZ, UK, USA, Europe as well as the wine experience to China
- Drive brand awareness for *Clare Valley - Breathe It In*

The *South Australian Regional Visitor Strategy (2018)*, identifies the focus for the Clare Valley as:

Encouraging high spending international and interstate visitors to stay overnight in the region; and developing new and commissionable nature-based, heritage and epicurean visitor experiences and additional quality accommodation.

This will be achieved through marketing; collaboration; events; investment in accommodation, experiences and visitor infrastructure; and building industry capability.



To optimise long-term vitality, the *Clare Valley Strategy* identifies the need for the greater Clare Valley economic region to:

- Increase the demand for its wine and food brands to reach or exceed current levels of supply,
- Earn higher price-points for its produce,
- Build premium value in our intellectual property,
- Attract more people to live in our communities, and
- Grow the capital value of our real estate and strategic assets.

Finally, Legatus Group is working on behalf of member Councils on a number of initiatives, including the identification of deficiencies that affect freight, tourism and community road use.

Macro economic trends

Macro economic trends that affect Clare and Gilbert Valleys range from well known issues like climate change and the growth of Asian economies, to more localised concerns like road funding. University of South Australia Professors Beer and Sigala provided a summary of emerging factors to be considered in the development of this Plan:

- Lower Australian dollar and higher American interest rates as a consequence of United States economic stimulation borrowing: Australian beneficiaries include exporting industries, including wine and food.



Clare & Gilbert Valleys Economic Development Plan

- The district needs a strong narrative about how it is adapting to climate change, e.g. advancements in broadscale farming, improved productivity, new wine varieties, better water management practices.
- Wellness is a megatrend, reflecting international concerns about obesity, food safety and sensitivity, and living well despite disease and disability - clean, beautiful regions with good health services and holistic therapies appeal to potential residents and visitors.
- A more buoyant labour market, and the rise of distance working, attracts young professionals with new skills.
- The rise of platform technologies (AirBnB/Stayz/Uber etc.) has the potential to both disrupt existing accommodation and tourism provision and create new opportunities as they provide an additional avenue for promotion.
- Demography:
 - Demography shapes demand for both goods and services.
 - Global population to top out around 2050 at 10 -11bn.
 - Ageing of the Australian and global population, with 25% of the Australian population aged over 65 by 2030. As a result of the 'long boom', many older Australians have significant assets in housing and superannuation that generate high disposable incomes.
 - The population in our hemisphere is younger and therefore growing faster than elsewhere - and the Asian region is moving more rapidly into the middle class than other parts of the world.
- Tourism:
 - Wine, food and tourism growth (\$8bn target for South Australia) reflects a more connected tourism industry .
 - Greater domestic disposal income, particularly for service sector employees who are oriented to luxury.
 - Growth in traffic through Adelaide airport, but gaps in transport/road quality to attract visitors to the Clare and Gilbert Valleys region.
- Wine industry:
 - Ongoing growth in Asian wine consumption.
 - Well documented shift to quality consumption.
 - Impacts of climate change - adaptation in terms of variety, viticulture, land use.
 - Competition from large numbers of international wine producing regions, how to create a distinctive proposition.
 - Artificial Intelligence and the Internet of Things (IoT).
 - New tools for viticulture and wine making.
- Wine industry tourism:
 - Proliferation and diversification of the wine tourism market (age, nationality, psychographics, motivations) driven by and satisfied by



- the proliferation of wine experiences.
- Design thinking and experience design – and the use of digital technologies to promote and engage with tourism experiences.
- Co-creation of transformational experiences and wine routes.
- Augmentation of wine (tourism) offering with culture, art, gastronomy and other sectors.
- Marketing and technology:
 - Social media marketing , brand communities, influencer marketing, wine critiques, distribution, big data for predicting wine prices.
 - Interactive technology for enhancing and enriching wine tourism experiences: smart labels, interactive tables, smart sommeliers, block chain for wine selling-trading, crowdfunding.

A tapestry of villages

Clare & Gilbert Valleys Council is home to 15 towns and settlements, including the service towns of Clare, Riverton, Saddleworth and Auburn, and the villages of Stockport, Tarlee, Rhynie, Manoora, Marrabel, Waterloo, Mintaro, Penwortham, Leasingham, Watervale and Sevenhill. Each has a unique identity and a proud history. The towns and settlements of the district make a strong contribution to its amenity, providing community connections as well as retail, hospitality and service opportunities.

Population and enterprise retention is an important issue for smaller communities, particularly those located away from the main tourism routes where it can be difficult to generate the demand needed to build successful businesses.

Rural communities have a long tradition of healthy competition, often based around sporting affiliations. However inter-town rivalries are a distraction from the bigger picture whereby towns within Clare and Gilbert Valleys should be creating a cohesive and complementary offering that places the district in a strong competitive position against other South Australian regions - attracting visitors, new residents and viable businesses.

The strong inward migration in some postcodes (> 30% of the population lived elsewhere 5 years ago in 5453 (Clare, Sevenhill, Armagh and surrounds), 5415 (Mintaro) and 5451 (Auburn)) is an indicator of the appeal of the district, and a strength that can be capitalised upon. However population growth is patchy, and there is a largely untapped opportunity to promote Riverton and southern towns as ideal lifestyle/commuter locations to cater for the economic growth in the Northern Adelaide/Gawler region. Riverton provides ample residential zoned land and many country amenities that could easily cater for a larger town, particularly as Gawler is only 40 minutes away. Improvements to the Horrocks Highway and ongoing amenity improvements to these southern towns are critical for population attraction and growth.



Capacity

Regional capacity is discussed in this section in relation to human capital and business growth.

Human capital

Arguably the most important measure of regional capacity is human capital - the extent to which a region's population is able to engage in innovative activities, with educational attainment and skill development key contributing factors.

The Training and Skills Commission's 2018 *Yorke and Mid North Regional Profile* identifies four key challenges for the region:

1. Labour shortages, with many employers already employing people from outside the region, and workforce demand expected to grow in the construction, tourism and disability care sectors.
1. Attracting new residents with the appropriate skills, as well as attracting professionals with qualifications in the health care sector.
2. Business investment to support future population growth, with the need for appropriate infrastructure and access to roads, gas and water supplies to attract businesses to the region.
3. The significant growth in demand for local services under the full rollout of the NDIS in 2019 poses a risk to the region if an adequately trained and available workforce cannot be developed or attracted.

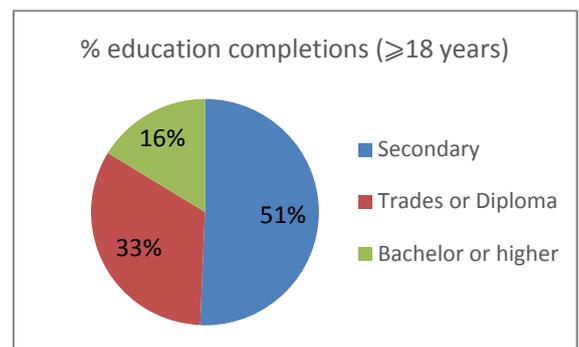
The skills situation in Clare and Gilbert Valleys is acute, with only 74 people registered as unemployed (3.4% unemployment rate) in the Clare statistical Area, and 92 in Gilbert Valley (3.6% unemployment rate - *Small Area Labour Markets*, Dec 2017). Industry leaders consulted in the development of this plan identified tourism skills as a key deficiency, particularly high-end food, service and tour guiding. Initiatives that expand the number and range of vocational courses will be important in addressing labour shortages.

Low education levels are a potential barrier to economic development, as noted in an OECD report on education for innovation:

No wonder there is a very strong correlation between education and skills and the uptake and use of digital technologies in various spheres of life. The role of education and skills in promoting innovation is critical.

In Clare & Gilbert Valleys, half (51%) of the population aged 18 and over have only secondary education, and 20% of these (609 people) have achieved Year 9 or lower.

Higher qualifications are also under-represented, only 16% of people aged 18 and over having bachelor degrees or higher,



Clare & Gilbert Valleys Economic Development Plan

and a third (33%) having trade or diploma qualifications.

People with lower education levels are more likely to be disengaged from the workforce (see *Headline data* attachment): 62% of people in this Council area who have only secondary education are partially or not engaged in employment, compared to 52% of those with bachelor or higher qualifications and 51% of those with trade qualifications (Cert I-IV).

Volunteering is also a measure of human capital, and has been an important factor in maintaining social cohesion and community assets in regional areas. While the overall number of volunteers in Clare and Gilbert Valleys has grown by 192 persons, the main growth has been for people aged 60 and over.

The nature of volunteering by older people tends to be for social connectivity rather than assisting in delivering services. At the same time, while younger cohorts are volunteering (there has been a net growth of 56 volunteers in the under 50 age group), their purpose in volunteering is much different:

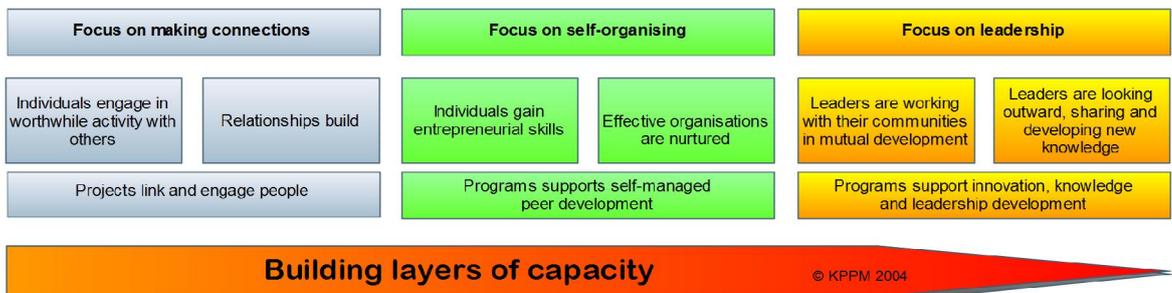
Volunteering no longer primarily a pathway to retirement, increasingly it is used as a pathway to employment.

Across all age groups, the pattern of volunteering is shifting moving away from regular involvement, particularly on committees, in favour of short bursts of involvement on specific projects (see image) and strategies for engaging volunteers must adjust to accommodate volunteer expectations of condensed, meaningful activity.



At the same time there is a trend in workplaces to offer induction, training and supervision of volunteers in much the same way that it is provided to paid staff. This results in a much more structured volunteering program, specifically tied to strategic directions.

Well-structured volunteering programs can take advantage of the 'burst of action' approach to drive community and economic development (as illustrated in the *Building layers of capacity* model).



Business dynamics

Business commencements and growth are the second key measure of economic capacity. As can be seen in the full chart under the *Headline data* attachment, in the five years between the 2011 and 2016 Census, Clare and Gilbert Valleys has seen:

- An increase of 49 businesses that employ no staff (21% of the 2016 total of 423 businesses in this category)
- A decrease of 127 businesses that employ 1-19 staff (35% of the 2016 total of 365 businesses in this category)
- A doubling of the number of businesses that employ 20 or more staff (from 15 in 2011 to 29 in 2016)

While increases in the number of micro and large businesses are positive, the loss of medium-sized businesses is a concern as this category is the largest cumulative employer. Medium sized business loss has been felt most heavily in the agricultural sector (unsurprising given the rate of farm agglomeration) and manufacturing, with a smaller but still significant loss of medium sized businesses in the construction and retail sectors (although micro businesses have grown in these two sectors).

Analysis of hours worked by sole traders, small businesses and large businesses (see *Headline data*) shows that only half (51%) of sole traders report working more than 40 hours per week, compared to 71% of owners of medium and 74% of owners of large businesses. Work/life balance is enviable, but these data suggest that there are 230 sole traders and 118 small employers who are 'under capacity'. The attractiveness of lifestyle businesses can be a barrier to economic growth, particularly in retail, hospitality and tourism where visitors expect weekend and after hours service and lifestyle business owners typically seek to minimise work at these times. Little can be done to assist lifestyle businesses to operate more effectively, so business development programs should target business owners who want to grow their business or improve profitability.

While concerns about available skills are heard from many sectors, a serious undersupply of specific occupations in the tourism sector (e.g. chefs) and health sector (e.g. personal care workers) has the potential to undermine business confidence and restrict economic growth. An appealing region like Clare and Gilbert Valleys is in a strong competitive position to attract new residents with in-demand skills, provided that the existing community is welcoming of diversity and the region offers and promotes the services and amenities to entice skilled residents.

Amenity and ambition

The 2018 survey of 60 businesses by RDA YMN found that lifestyle was the biggest locational driver, with 58% of respondents citing this reason - followed by business opportunity (50%) – see graph *Reasons for locating business in C&GCV*.



The vast majority (86%) of businesses surveyed by the RDA YMN were at least 'moderately confident' about the future of their business (see *Headline data*). Businesses that were 'fairly' or 'very confident' of their future gave the following reasons:



- Business and marketing strategies
- Diversification of product/service
- Employ local young people
- Favourable government policy
- Good tourism levels
- Online business with sales beyond the local area
- Open weekends
- Positive outlook for agriculture/viticulture
- Reputation, community and customer loyalty
- Taking the lead in organising events that benefit the business and region

Businesses that were 'not confident' or 'somewhat confident' listed their reasons as: ageing population (retirement town); high cost of rent, wages, freight, power; lack of funding for the arts; climate change; online retail; inability to attract good staff; and dependence upon variable seasons.

The district has strong appeal for affluent retirees looking for holiday and lifestyle homes. While the notion of lifestyle businesses does not necessarily deliver the professional service levels needed to boost tourism, inward migration of affluent residents will generate better returns for local businesses, increase visitation at community and cultural events, and strengthen community involvement.

Communities in the district have been active in welcoming and assisting new migrants, which is critical to migrant retention, however the small number of people from other cultures is a barrier in itself. A coordinated marketing campaign to attract groups of people with similar backgrounds would assist to fill skill gaps, retain these people in our community, and contribute to population growth.

The proposed development of an iconic new art gallery in Clare would be a bold statement in the support of the arts and culture sector in the region and provide further appeal to tourists and skilled residents (who tend to demand cultural activities).



Wine and food

The activities that cater for tourists are also highly appealing to residents (e.g. events, restaurants, festivals). The Clare Valley is in the fortunate position of having many “city-type” cultural activities and events, particularly compared to towns of a similar scale in other regions, and these activities are a selling point to attract skilled workers and their families.

The Clare Valley wine region is famous for its world class wines and has achieved recognition as Australia’s ‘Capital of Riesling’. Combined with Shiraz as a staple, and emerging wine varieties, the Clare Valley has a strong future in viticulture and winemaking (Clare & Gilbert Valley Council’s *Strategic Plan 2020*).

With more than 200 grape growers, producing about 20,000 tonnes of wine grapes per year, the wine industry contributes to exports, local jobs, tourism experiences and regional branding. Two major annual events, The Clare Valley Wine Show and the Clare Valley Gourmet Weekend, are delivered by Clare Valley Winemakers (now the Clare Valley Wine and Grape Association).

Clare Valley Cuisine provides a regional brand and coordinated marketing for food producers and restaurateurs within the Clare Valley tourism region. To protect the use of the term “made in the Clare Valley”, all members must either grow or source their products regionally.

Brewing and distilling industries are small niche markets with the potential to grow – based on tourism demand for diverse experiences and the connection between grower and brewer/distiller.

Clare Valley farmers and producers such as Four Leaf Milling, Savannah Farm and Pangkarra have in recent times created value-added brands to earn a price premium for their produce and tap into quality distribution channels. The Celsius research identified a potential market for quality locavore picnic baskets and novelty in-situ catering or dining events such as meals at Burra Gorge, Burra mines, in the Attunga Quarry, on Farms or in Farming Homesteads, as part of cycling or hiking tours, or as ‘pop-up restaurants’ in heritage buildings. Dinners under the stars or full moon, plus meet the winemaker or farmer events also appeal. Such ideas create interest and memorability in a manner that supports and strengthens the Clare Valley proposition. Further development of premium local foods will assist the region to build a reputation for outstanding food. (Clare Valley Strategy)

From a tourism perspective, the combination of good food and beverage is essential, however there is need for luxury experiences - restaurants, accommodation, relaxation experiences, and specifically destination-quality cheese makers and chocolateers. As demand for food processing sites grows, it may be opportune to consider the creation of a specialist food production zone.

Wine and food tourism requires high-end accommodation and transport providers that understand target markets (these elements are underdeveloped), can access industry skill sets (a workforce that is in undersupply), and deliver contemporary marketing that taps into social media influence across mass and niche markets.



Agriculture

Australian food and fibre production is well placed to service growing Asian demand, mitigating to some degree the price-taking disadvantages of commodity production. Farmers are supplementing traditional varieties such as wheat with higher value niche grains like legumes, and market and climate vagaries for grain production are seeing a shift back to mixed farming (generally lambs) to ameliorate risk. There has been some interest in the establishment of a nitrogen urea manufacturing plant in the southern parts of the Council area, but products like biofuels and renewable energy infrastructure are highly site-dependent and are not seeing significant investment at this stage.

A strong agricultural sector provides important flow-on benefits in local economies, including agricultural supply and service industries, use of local services (e.g. schools, health) and local purchase. Growth in agricultural output and revenues is mainly governed by factors outside the influence of Local Government, notably weather/climate, markets and pricing, transport costs, access to finance, and uptake of technology, however Local Government, RDA and Local Government Regions (Legatus) can apply pressure to State and Commonwealth Governments to address regulatory and market barriers such as heavy vehicle access, interest rate support, and access to housing finance.

In the Clare and Gilbert Valleys district, agriculture (including forestry and fishery) has the largest number of businesses of any sector (708 businesses in the 2016 Census), *none of which employ more than 19 people*. There has been a loss of 215 positions in agriculture since the 2006 Census; and - since the 2011 Census - a loss of all three businesses that employed 20 or more staff, a loss of 42 businesses that employed 1-19 staff, with a gain of only 3 non-employing businesses.

81% of agricultural businesses do not employ any staff. Only 254 people reported that they are employees in agricultural businesses, with a further 113 stating that they are 'contributing family workers'. 218 agricultural businesses (31%) were unincorporated (sole traders), a business structure that puts personal assets at higher risk - reinforced by industry observations that poor financial literacy is a barrier to farm viability. The size of the agricultural sole trader cohort suggests that business development programs that assist sole traders to professionalise their business may reduce risks associated with seasonal variability and potentially lead to increased employment.

While better management and improved productivity are good outcomes (and there are opportunities to encourage participation in the Primary Producers SA financial management programmes), farm agglomeration and increased use of mechanisation and technology means that financial growth in this sector does not necessarily translate to more jobs. However, there are opportunities to create new ventures (and hence employment) through innovative collaborations facilitated through local farmer 'sounding boards'.

Economic development can be influenced in other ways: RDAs have had success in developing the capacity of farm managers through research that identifies skill development needs (e.g. *What Future Primary Industries* by RDA Murraylands and



Riverland) and in lobbying for infrastructure efficiencies and red tape reduction (e.g. the collaborative 90 Day Change Project *Improving Road Transport for the Agriculture Industry*).

While broadacre and viticulture are the main primary industries in the Clare and Gilbert Valleys, there is growing interest in niche food production and processing, producing localised products that address community concerns about food miles and food quality, add value to the Clare Valley brand, and offer additional product and experience choices for visitors. Council planning policy supports food production and processing in the Primary Production Zones, and 'vibrancy creating' food outlets such as farmers markets or popups.

Clare and Gilbert Valleys has a strong primary industries services sector, and has the capacity to further develop the service sector by branding the district as a service hub for a region stretching from the Flinders Ranges to Adelaide.

Health and wellbeing

Health Care and Social Assistance is the second largest industry in Clare and Gilbert Valleys (after Agriculture), with 429 employees in 2016 (22% growth since 2006). The two largest occupational groupings in this sector are Professionals (60% of the 2016 workforce) and Community and Personal Service Workers (38% of the workforce).

The roll-out of the NDIS, originally scheduled for early 2018 and now more likely to be completed in 2019, projects that there will be 226 NDIS participants in Clare and Gilbert Valleys, an increase of 162 participants from existing support schemes - most of whom will be aged 5-14 years. Up to 650 additional positions will be needed to service the NDIS in the Yorke and Mid North Region (a breakdown by Council area is not yet available) with much of the associated jobs growth in semi-skilled Personal Care roles. A number of reliable sources (including the Productivity Commission and Training and Skills Commission) have projected NDIS labour deficiencies in regional areas. The implications for regional Councils in South Australia (*Socio - economic impacts from the NDIS on regional local governments*) include:

- The State Government proposal to cap Council rates will limit Councils' ability to provide unfunded community services.
- Limitations on transport funding in the NDIS pricing structure are a significant concern for NDIS families and Community Passenger Transport providers. While Community Passenger Transport funding has been extended to 2020, the future of this successful model is unclear.
- Concern about the cost of upgrading Council infrastructure (e.g. buildings, swimming pools) to support participation of people with disability.
- In areas where NDIS services cannot be accessed because of low service coverage or lack of appropriate workforce, it is likely that there will be outward migration to areas with better NDIS options, further exacerbating



the problems of population decline in many rural areas. Similarly the population revival in areas of high rural amenity - led by retirees, teleworkers and online/footloose businesses - may be jeopardised by poor access to disability services.

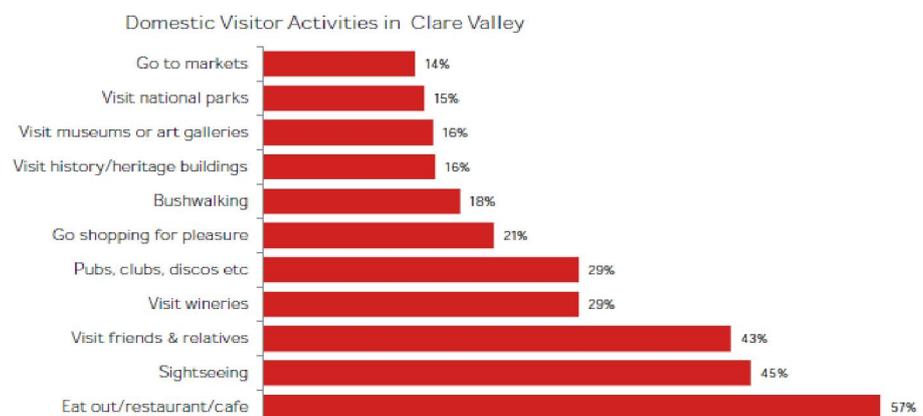
- Councils (and other employers) are already struggling to attract and retain skilled staff, further demand will exacerbate labour pressures, resulting in reduced productivity and service delays.
- As the Baby Boomers age and are less able to volunteer, reliance on volunteers to deliver core services (such as Community Passenger Transport, and assistance with disability programs) will become unsustainable, adding to Council service delivery costs.
- Because NDIS service delivery is a competitive market based on 'pay per service', there is neither the incentive nor capacity for collaboration for the greater good. NDIS providers, which are paid only for services delivered, are unable to fund staff participation in working groups and networks, with implications for community and economic development.
- Rather than accepting the disadvantages associated with thin markets, Local Government can activate its community to become a region of choice for NDIS participants and providers.

Tourism

Tourism in the Clare Valley tourism region (which is broader than the Clare & Gilbert Valleys Council area) contributed \$93 million in 2016/17 to the regional economy, supporting 194 tourism businesses (SATC, 2017), 400 direct and 200 indirect jobs (SA Regional Visitor Strategy, 2018). One in sixteen jobs in the region are in tourism.

The Clare Valley tourism region attracts 175,000 overnight visitors per annum (416,000 bed nights) with 98% from domestic markets, in addition to 326,000 domestic day trips (SATC, March 2018).

According to SATC (2016), the most popular domestic visitor activities in this region are: eating out (57%),



Clare Valley has the highest average annual occupancy rate of all South Australian regions.

Infographic source:
SA Regional Visitor Strategy

sightseeing (45%), visiting friends and relatives (43%), visiting wineries and visiting pubs (both 29%) – see *Domestic Activities* chart previous page. The high value of ‘eating out’ reinforces the need for food champions, skill development and coordinated marketing by this sector.

Regional tourism development priorities are marketing, events, collaboration, industry capability, accommodation, experience development and visitor infrastructure (*South Australian Regional Visitor Strategy*, 2018).

The *Clare Valley and Burra Tourism Project* (Celsius Research, which conducted market research in a number of Australian, European and North American markets) identified the key interest-based tourism segments as: the active, the explorer, the artsy and the indulgent - with younger active and indulgent the most lucrative and the least represented segments in this region.

Investment in activity-based experiences and luxury accommodation, plus appropriate marketing, will be needed to attract these segments. Sign-posting is a major short term and high priority imperative – not only road signs but for walking trails, cycling trails and other points of interest (*Clare Valley Strategy*).

The big insight from the Celsius research is the opportunity to create more low cost guided tours, higher priced experience-based packaged tours, and personalised, tailored, packaged tours (for International, Active and Indulgent visitors). That is: integrated and diverse tailored, guided experiences.
(*Clare Valley Strategy*)

South Australia's *Nature Based Tourism Action Plan* also highlights the importance of multi-day walking trails. Clare and Gilbert Valleys are well-endowed with trails, particularly the cross-regional Heysen, Mawson and Kidman Trails and the sub-regional Riesling and Rattler Trails.

The location of the Clare and Gilbert Valleys on the route to the Flinders Ranges and Outback is an untapped resource: 10% of international visitors to South Australia travel to the Flinders Ranges, and only 0.9% visit the Clare Valley tourism region¹. Services that make it easy for visitors to access the region from the Adelaide Airport, and to visit wineries without having to drive (e.g. chauffeur, bus tours), will be essential to expand high value international visitation. Legatus Group projects such as the Regional Local Roads Strategy (addressing freight, tourism and community road use deficiencies), the acceleration of Wi-Fi in small villages, and a Visitor Information Services audit are expected to contribute to improved user experiences.

Clare and Gilbert Valleys is well serviced by industry groups that drive tourism, such as the Clare Valley Alliance, Clare Valley Wine and Grape Association, South Australian Tourism Commission supported Regional Tourism Officers, and town progress associations. As tourism development in this region is largely delivered by the various contributing sectors, the focus of tourism in this *Economic Development Plan* is primarily on policies that support town activation, small business development, and coordination of tourism marketing.

¹ SATC/TRA International Visits to South Australia, Dec 2017



Planning and zoning

The RDA YMN survey sought business feedback about Council's Development Plan. In both this question, and the broader question about business priorities (see next heading), there was a consistent call for:

1. More industrial and commercial land on transport routes
2. Better information about zoning in rural areas, particularly sites for small-scale food production to enhance diversity in the district's wine and food offering
3. Planning that allows for peri-urban living (1-10 acre lots)
4. Main street upgrades with limitations on large retail developments that draw business away from main streets
5. High end accommodation (large and small), including a 'hero' resort
6. More residential land
7. Ensuring Clare's attraction as a beautiful destination is not compromised by development, especially on the approaches to our town
8. Fast planning approvals

Research conducted as part of Council's Development Plan Amendment process for the Clare town centre (*Clare Township Spatial Analysis Report*) found:

- The district is likely to experience uneven and unpredictable rates of industry growth as a result of an economic base centred on an agricultural sector that is subject to volatile market conditions.
- Although the wine industry and related food and tourism activities are expected to continue to grow, there is less certainty surrounding the building and construction industry, broad hectare farming and small-scale manufacturing enterprises.
- Planning needs to allow for considerable expansion of the tourism sector with predictions of a doubling of the size of sector by 2030 through a more diverse tourism base - creating tensions in the allocation of land for industrial and commercial use (where main road freight access is a priority) and the amenity of the region to visitors (where street scapes are part of the appeal).
- The Clare town centre is expected to host more major and community events, especially those associated with food and wine, music, arts and culture. Catering for these activities and the visitors attending them will require attention to Development Plan policy to facilitate the development of hotel/motel accommodation and other activities servicing the tourism industry.
- There is a need for more diverse housing within the Clare town centre, particularly affordable housing as well as housing that caters for older members of the community. Design guidelines are needed to preserve amenity and appeal at the same time as they deliver greater density and vibrant neighbourhoods.

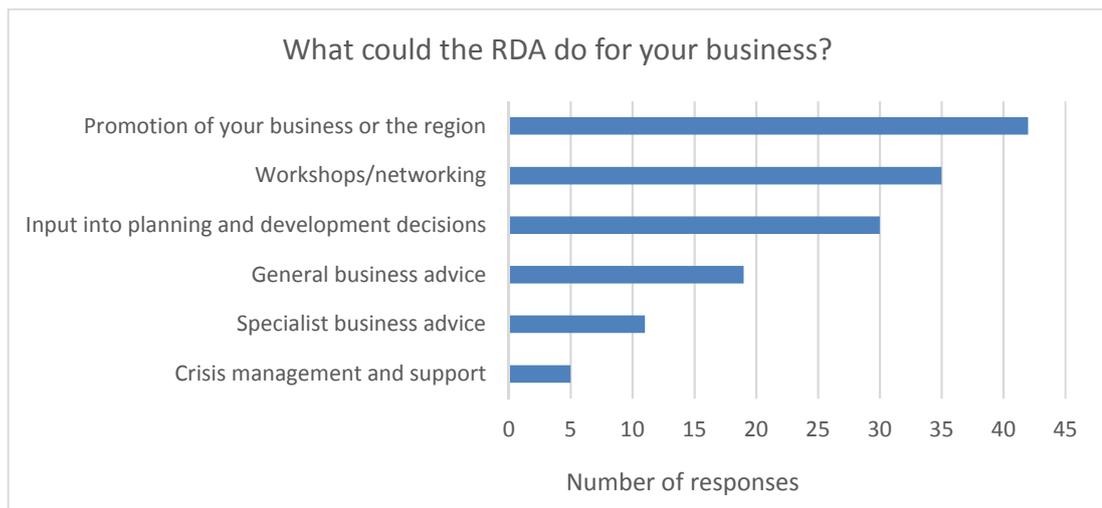


Business priorities

The RDA YMN survey of businesses asked "How can we attract more business or investment to the Clare Valley? What kinds of benefits or opportunities would you highlight?". Responses to this question were sorted into 'natural' categories, with the suggestions that were mentioned more than once shown in the attachment *Survey responses*. The most frequently-mentioned suggestions were:

1. Promote our lifestyle and business advantages
2. Beautify main streets
3. Better roads and signage
4. Land zoning that allows for business investment
5. Diverse high end tourism product (particularly accommodation)
6. Vibrant main streets on weekends

The chart shows responses to the question 'What could the RDA do for your business', these have been captured in the Yorke and Mid North Road Map and in the actions for this Plan.



Becoming 'China Ready' is a key element of the South Australian Government's economic growth strategy. The Clare Valley Tourism region is underprepared for Chinese and other Asian visitors, despite strong Chinese investment into wine and agricultural sectors. Tourism industry preparedness is being largely addressed through industry associations, with promotion of China Ready initiatives also included in this strategy.

The growth of renewable energy investment in the regions surrounding Clare and Gilbert Valleys creates opportunities to attract new residents working in this sector, as well as services to support these industries. Development interest from the renewable energy sector (especially solar) present new employment opportunities.

Good internet, beautiful surroundings, affordable housing and easily-accessible retail, services and hospitality make the district ideal for knowledge-based workers



and associated industries. The advent of the NBN and easy access to Adelaide provide opportunities for workers to be based in regional locations and travel to the city as required, with several local businesses already using this business model.

Similarly, the district already has a strong arts and crafts community, which provides cultural development, tourism appeal, and quality niche products. The unique flavour of each of the towns and localities provides diversity and interest - a strong selling point with 'tree changers'. The proposed Clare Art Gallery could further enhance the tourism and culture offering of the region.

There is a growing trend across the world for creative industries to add to the vibrancy, liveability and economy of regions. Regional communities offer creative inspiration, affordability, quiet working environment, and nurturing community values. The progression of locally made and produced has seen the growth of farmers and artisan markets that support smaller home-based operators. With more regional communities coming together to work collectively, Clare and Gilbert Valleys has potential to be a hub for both knowledge-intensive and creative industries through physical sites (e.g. co-working space, makers spaces or incubation sites) and programs that attract, link and develop entrepreneurs and knowledge workers (e.g. research internships, entrepreneur-in-residence, supply chain clusters, ASBAS Digital Solutions program).

Objectives

The following objectives frame the Economic Development Plan:

1. Build the **skill base** of the district so that businesses grow and locals can enjoy viable, stimulating career paths.
2. Activate promotion and **marketing** to prospective visitors to drive up visitation and expand the value of the visitor economy.
3. Promote **sustainable practices** that enhance natural ecologies, capitalise on renewable energy, preserve water resources, and ensure business viability in an era of climate change.
4. Implement **planning and development policies and practices** that preserve and enhance the amenity of the district, encourage economic diversity, attract new residents, and support business investment - particularly in iconic 'hero' tourism product.
5. Develop and promote the **amenity** of the district to attract new residents, businesses and visitors.
6. **Maintain good communication and innovation networks** between Council, RDA YMN, industry leaders, local businesses and community groups to support the growth of a 'can do' enterprise culture.



Economic Development Plans should:

- Guide how we do 'business as usual'
- Leverage partnerships – being clear about 'who does what'

Existing funds/resourcing 

New funds/resourcing 

- Set out new actions to deliver aspirations

The Strategy

The implementation of the Economic Development Plan will be led by Clare & Gilbert Valleys Council and the RDA Yorke & Mid North. The actions set out below are generally allocated to a single driver who has responsibility for making sure they are delivered, although implementation may involve a number of partners.

Big, exciting projects need:

- A simple test of feasibility and fit (do we proceed?)
- Funding for development of a business case (who pays for the business case?)
- If business case is positive, a resourcing strategy (how do we fund it?)

Implementation will require resourcing: although there is immense goodwill and a small amount of existing staff time that can be committed by Council and RDA, the Plan cannot be fully realised without dedicated resourcing.

For this reason, the strategy set out below is divided into two sections:

1. Initiatives that can be delivered within existing resourcing; and
2. An expanded plan that requires additional resourcing for successful implementation.

Therefore, to implement this Plan successfully, consideration will need to be given to how the plan will be resourced as neither Council nor RDA YMN are sufficiently resourced to take on the additional tasks at this stage.

This *Economic Development Plan* recognises that a number of industry groups and business associations are operating effectively in the Clare and Gilbert Valleys district. This Plan aims to complement the work of those groups, and for this reason industry-specific initiatives are generally not included - except where action by Council or the RDA can accelerate outcomes.



A: Strategies that can be delivered with existing resourcing

Objective	Actions	Driver	Measure
1. Build the skill base	1. Work with businesses and training providers to identify skill gaps and secure training to provide a better skills match and expanded career opportunities	RDA YMN	Training has been delivered
	2. Tap into the ASBAS digital capacity-building program delivered by Adelaide Business Hub, promote heavily to local businesses to raise awareness of the need for improved digital capability, and build digital capacity	RDA YMN	ASBAS targets have been achieved
	3. Provide and promote Business2Business Program - small business advice, assistance and business breakfast program	RDA YMN	Agreed B2B Program measures
2. Promotion to increase tourism	1. Collaborate with the Regional Council of Goyder and Southern Flinders region to capitalise on UniSA research into boosting tourism spend	RDA YMN	UniSA research project completed and results disseminated
3. Sustainable practices	1. Identify and promote initiatives that contribute to sustainable agriculture and water use	NRM & Clare Valley Wine and Grape Assoc	Initiatives and outcomes are communicated to Council
	2. Monitor and respond to opportunities to attract large employers to the region – provided that the nature of these large businesses complement existing assets and do not detract from tourism and community amenity	All partners	
	3. Undertake an annual revision of the Economic Development Plan	Council	The Plan is current
4. Planning and development policies and practices	1. Identify and map potential sites/zones for hero accommodation and destination tourism product investment (see B.4 for further action)	Council	Investment sites/zones are available on website
	2. Identify and map potential sites/zones for cheese making and communicate to Clare Valley Alliance for promotion to potential operators	Council	Site information is provided to CVA
5. Developing and promoting the amenity of the district	1. Develop a Main Street Amenity policy and use it to attract investment in street scaping and business frontage upgrades (further action in B.4)	Council	Policy is endorsed
	2. Develop a 'move to CGV' page on Council's website, highlighting distance, retirement living, migrant support, affordability, amenity, employment and cultural advantages - promote via social media	Council	Webpage is live and current
			Each town holds at least



Clare & Gilbert Valleys Economic Development Plan

Objective	Actions	Driver	Measure
	<ol style="list-style-type: none"> 3. Ensure CGV is welcoming of new residents from different cultures by encouraging and organising community-based activities that include new residents 4. Learn from the success of Auburn activation, and extend practices to other towns 5. Agitate for upgrading of Horrocks Highway and other key routes 6. Establish a longer-term plan for diverting heavy vehicles from Clare's main street 	<p>Council</p> <p>Council</p> <p>Legatus</p> <p>Council</p>	<p>one 'new arrival' event per annum</p> <p>Weekend activity in other towns</p> <p>Infrastructure upgrades have occurred</p> <p>Heavy Vehicle diversion plan is released</p>
6. Good communication and innovation networks	<ol style="list-style-type: none"> 1. Convene an annual business forum that provides an update on Council and RDA economic development activities, emerging trends and new business opportunities 2. Get Economic Development on Council Meeting Agendas to ensure Elected Members are informed about Eco Dev initiatives and outcomes 3. Restructure Council's Community Grants program to quarantine funds for popup activities in empty shops and public spaces 	<p>RDA YMN</p> <p>Council</p> <p>Council</p>	<p>Business forum held annually</p> <p>Economic Development is a standing item on Council Agenda</p> <p>Updated Grant Program is implemented and reviewed</p>



B: Strategies that require additional resourcing

Objective	Actions	Driver	Measure
1. Build the skill base	1. Initiate industry development of promotional packages aimed at key occupations (such as chefs) and support the implementation of marketing campaigns in targeted interstate and overseas locations	RDA YMN	Promotional materials have been produced and disseminated
	2. Facilitate the establishment of a Business Innovation and Entrepreneur Centre in Clare to aide start-ups, build business capability, connect businesses and provide commercial and export advice	RDA YMN	Entrepreneur Centre is functioning
	3. Work with universities and the Mid North Knowledge Partnership to secure internships and student placements that will bring new perspectives and encourage students to consider relocating to the region when they have graduated	RDA YMN	2 internships and 4 student placements per annum
	4. Assist industry groups to source information and training to be 'China Ready'	RDA YMN	Industry participation
2. Promotion to increase tourism	1. Invest in Spendmapp (see attachment <i>Spendmapp</i>) to track resident and visitor spend and provide an evidence base for planning, investment attraction and promotion	Council	Spend is tracked and communicated to industry
	2. Facilitate the resourcing and activation of a Tourism Development Program (including demand mapping) to position the region as a stop-over for the Flinders Ranges	RDA YMN	Overseas visitation increases by 5% p/a
	3. In collaboration with Clare Valley Alliance, develop a regional digital marketing strategy for industry implementation	RDA YMN	Digital marketing strategy is launched
	4. Undertake a signage audit to support investment in wayfinding and interpretation	Council	Signage audit complete
	5. Investigate 'user pays' funding structures for tourism development, such as precinct marketing levies	Council	Structures are identified and market tested
3. Sustainable practices	1. Investigate and promote new technologies for more efficient use of water	Clare Valley Wine & Grape Assoc	Water efficiency information is provided on Council website
	2. Examine alternative energy technologies and their potential to be deployed on-farm for both producer use and export to the grid	Legatus	Alternative energy information is provided on Council website

Clare & Gilbert Valleys Economic Development Plan

Objective	Actions	Driver	Measure
4. Planning and development policies and practices	1. Develop a residential design policy to guide infill and higher density developments so that they complement the amenity of the district	Council	Design Policy released
	2. Develop, and work with industry to promote an investment prospectus for high value tourism ventures (especially hero attractions and accommodation)	RDA YMN	Prospectus released
	3. In conjunction with Primary Industries and Regions SA (PIRSA), identify and map primary production land with aesthetic and amenity which makes it appropriate for prospective re-zoning for rural living or tourism development	Council	New opportunities are promoted
5. Developing and promoting the amenity of the district	1. Investigate how community-managed assets (e.g. Town Halls) can be activated to support innovative entrepreneurial and creative initiatives and implement	Council	New ventures in community assets
	2. Develop a Weekend and Evening Activation Policy that addresses all elements of the activation pipeline (enquiries, forms and approvals, street/footpath closures etc), encourage initiatives that provide entertainment and vibrancy for locals and visitors	Council	Activation Policy released 20% increase in after-hours activation initiatives
	3. Promote unique shops and eateries that cater to higher spending visitors and provide a distinct and authentic Clare Valley retail experience	RDA YMN	"Clare Valley Lux" experience developed
	4. Upgrade the Clare main street	Council	Upgrade complete
	5. Promote Riverton and southern towns as lifestyle commuter opportunities, and work with the community to make new residents welcome	Council	1% p/a population increase in southern towns
6. Communication and innovation networks	1. Undertake a Library service and site review to support and create co-working and innovation spaces	Council	Review recommendations implemented
	2. Facilitate farmer sounding board workshops to identify and nurture collaborative ventures in collaboration with peak farming bodies and PIRSA	RDAYMN	New initiatives are developed by farmers



Implementation timeline

No	Action	Jul-Dec 2018	Jan-Jun 2019	Jul-Dec 2019	Jan-Jun 2020	Jul-Dec 2020	Jan-Jun 2021	Jul-Dec 2021	Jan-Jun 2022	
A1.1	Training for skill gaps	█								
A1.2	Deliver ASBAS	█								
A1.3	Deliver B2B program	█								
A2.1	UniSA research	█								
A3.1	Promote sustainable ag/water			█						
A3.2	Attract large employers	█								
A3.3	Revise Eco Dev Plan			█				█		
A4.1	Map hero sites/zones			█						
A4.2	Map cheesemaking sites			█						
A5.1	Develop Mainstreet Amenity Policy				█					
A5.2	Move to CGV page on website		█							
A5.3	Initiate events for new arrivals				█					
A5.4	Learn from Auburn	█								
A5.4	Upgrade key routes								█	
A5.5	Deliver plan for HV diversion								█	
A6.1	Annual business forum		█		█		█		█	
A6.2	EcoDev on Council Agenda		█							
A6.3	Restructure Community Grants	█								
B1.1	Key occupation promo disseminated			█						
B1.2	Business incubator/entrepreneur Centre					█				
B1.3	Internships and student placements			█						
B1.4	China Ready			█						
B2.1	Spendmapp info disseminated				█					
B2.2	Overseas visitor strategy implemented				█					
B2.3	Regional Digital Marketing Strategy		█							
B2.4	Signage audit						█			
B2.5	User pays models of tourism development								█	
B3.1	Promote water efficiency technologies					█				
B3.2	Alternative energy information					█				
B4.1	Residential Design Policy				█					
B4.2	Investment Prospectus high value tourism					█				
B4.3	Identify rezoning								█	
B5.1	Activate community-managed assets						█			
B5.2	Weekend and Evening Activation Policy			█						
B5.3	Promote high value product								█	
B5.4	Upgrade Clare main street							█		
B5.5	Promote lifestyle moves to southern towns					█				
B6.1	Library service and site review				█					
B6.2	Commence farmer sounding board program			█						
	Clare & Gilbert Valleys Council	█								
	RDA Yorke & Mid North	█								
	NRMB	█								
	Legatus	█								
	CVWGA	█								

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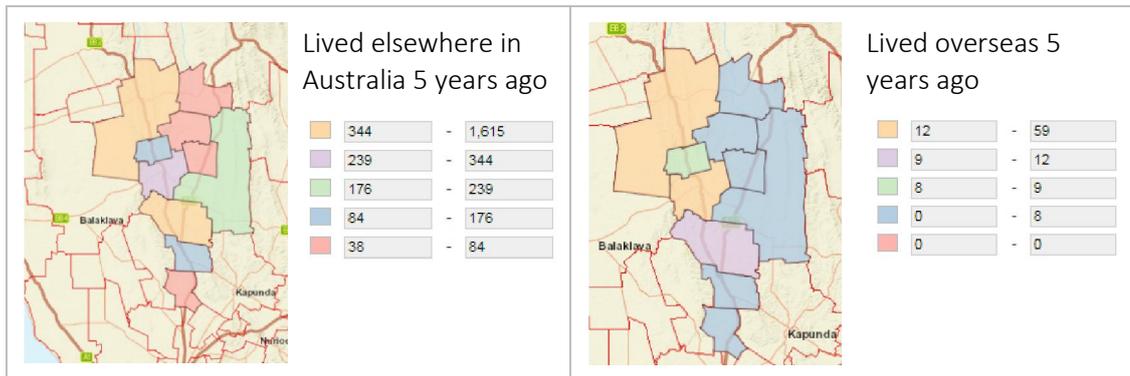
Attachments

Headline data

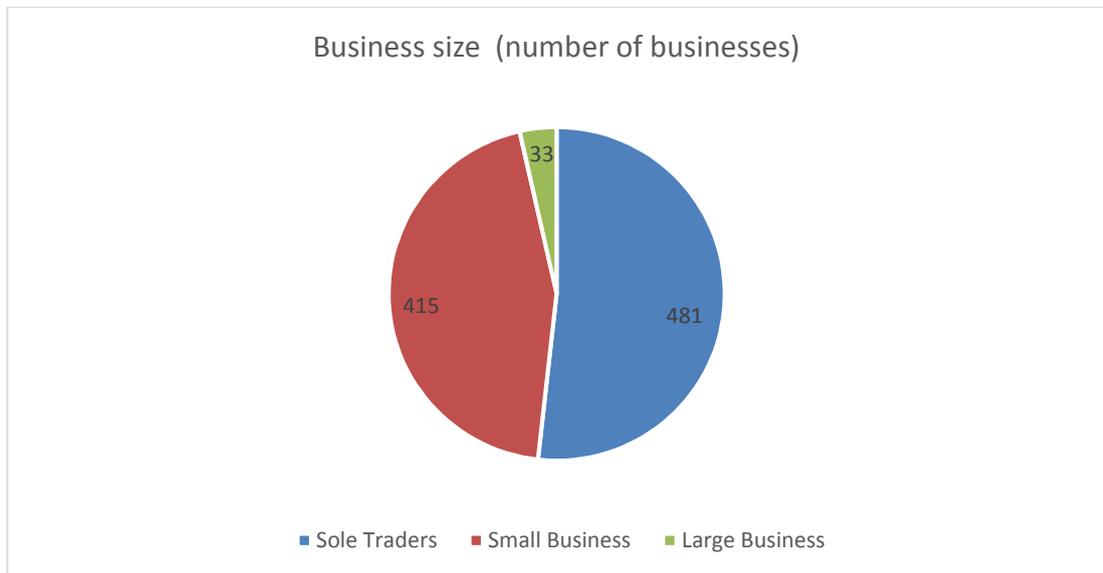
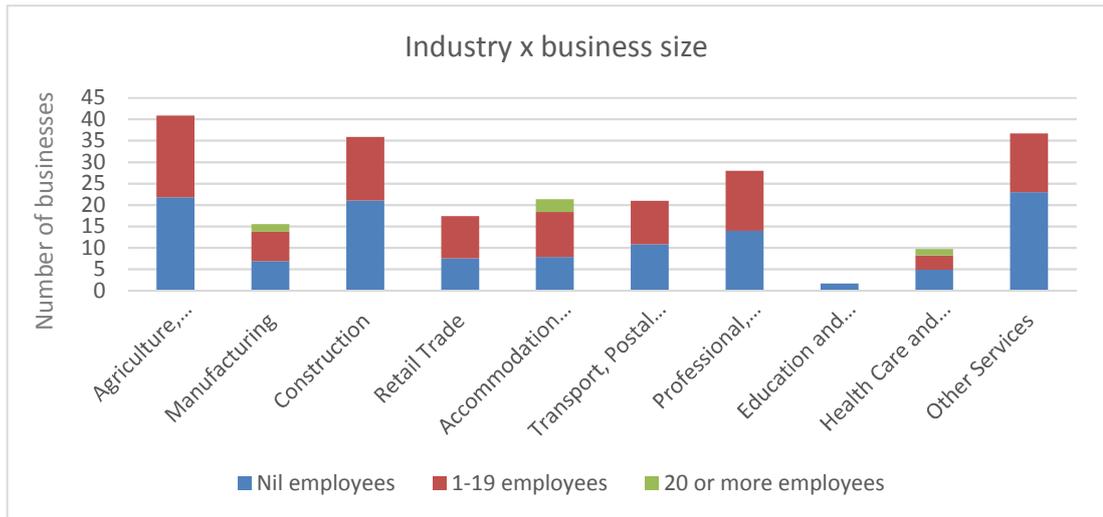
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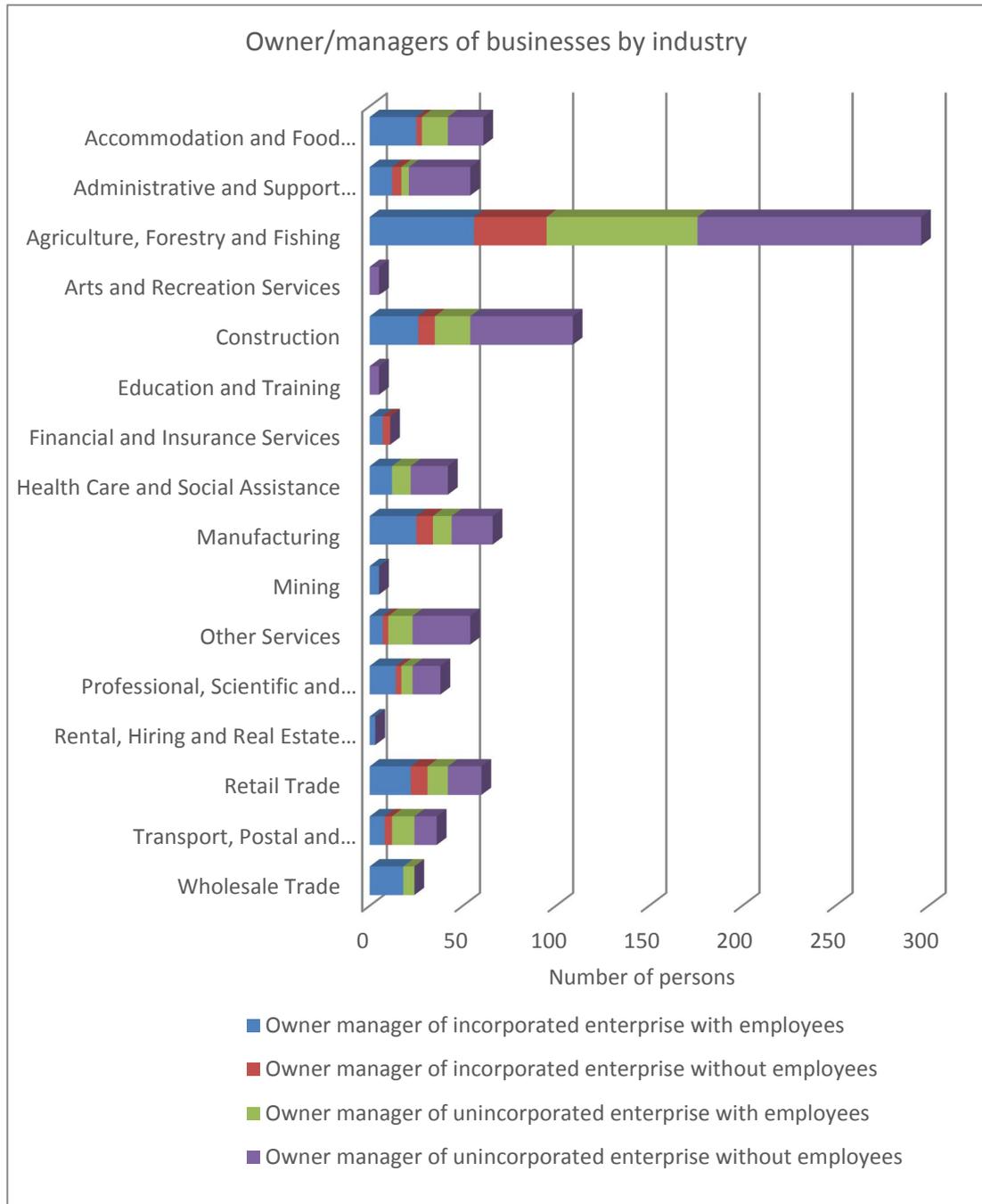
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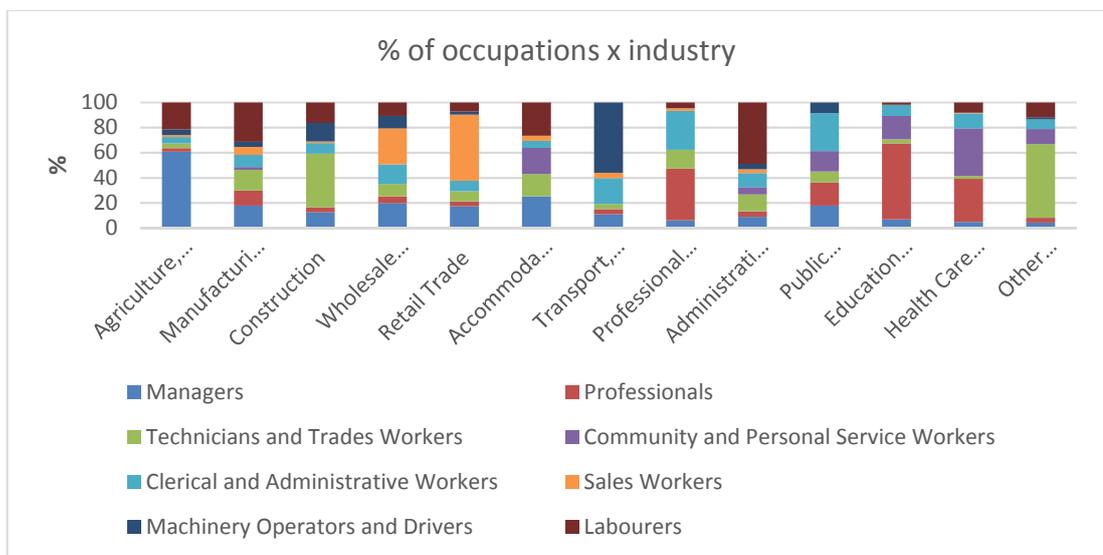
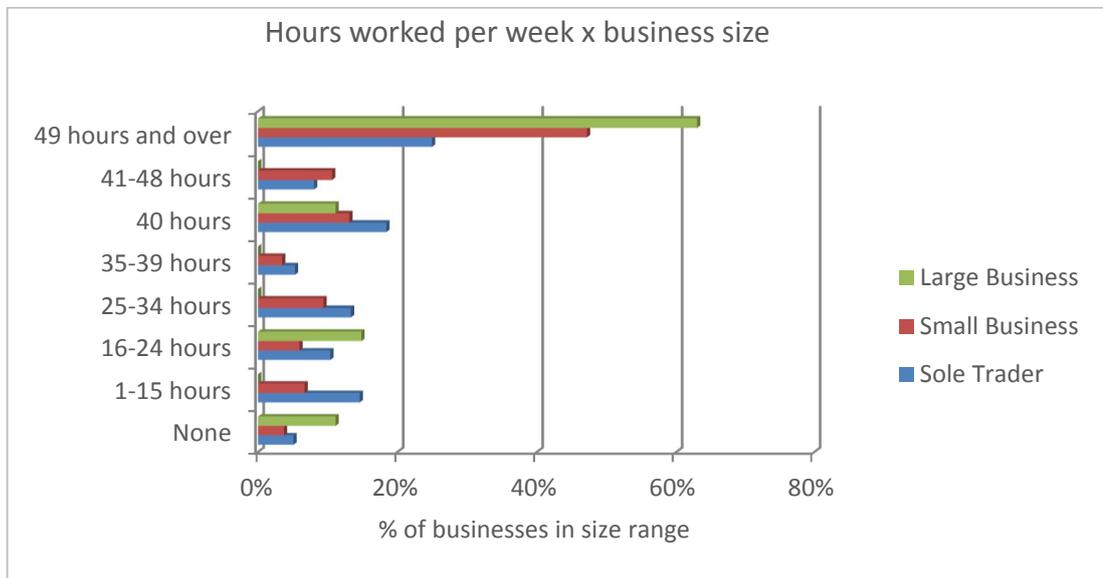
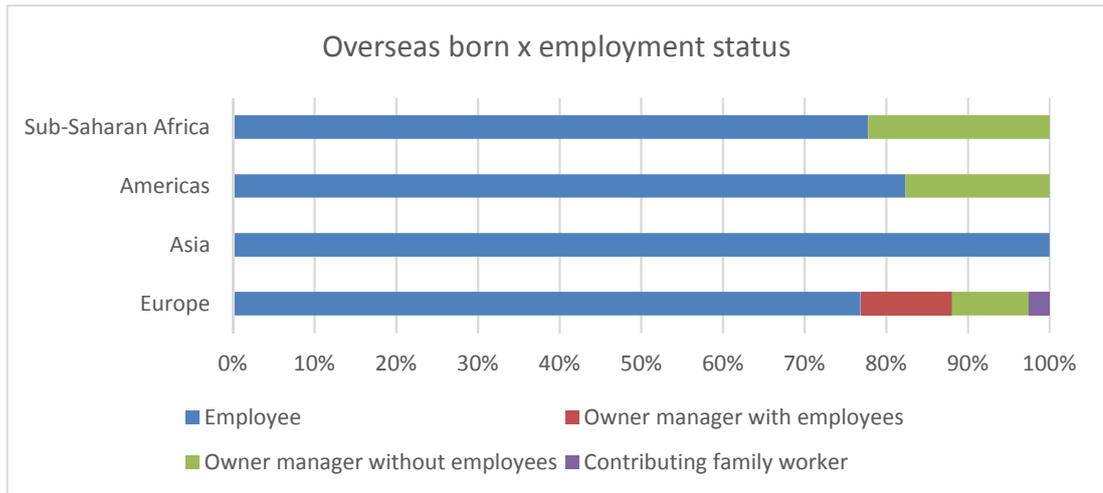
Population by usual address 5 years ago (2016)

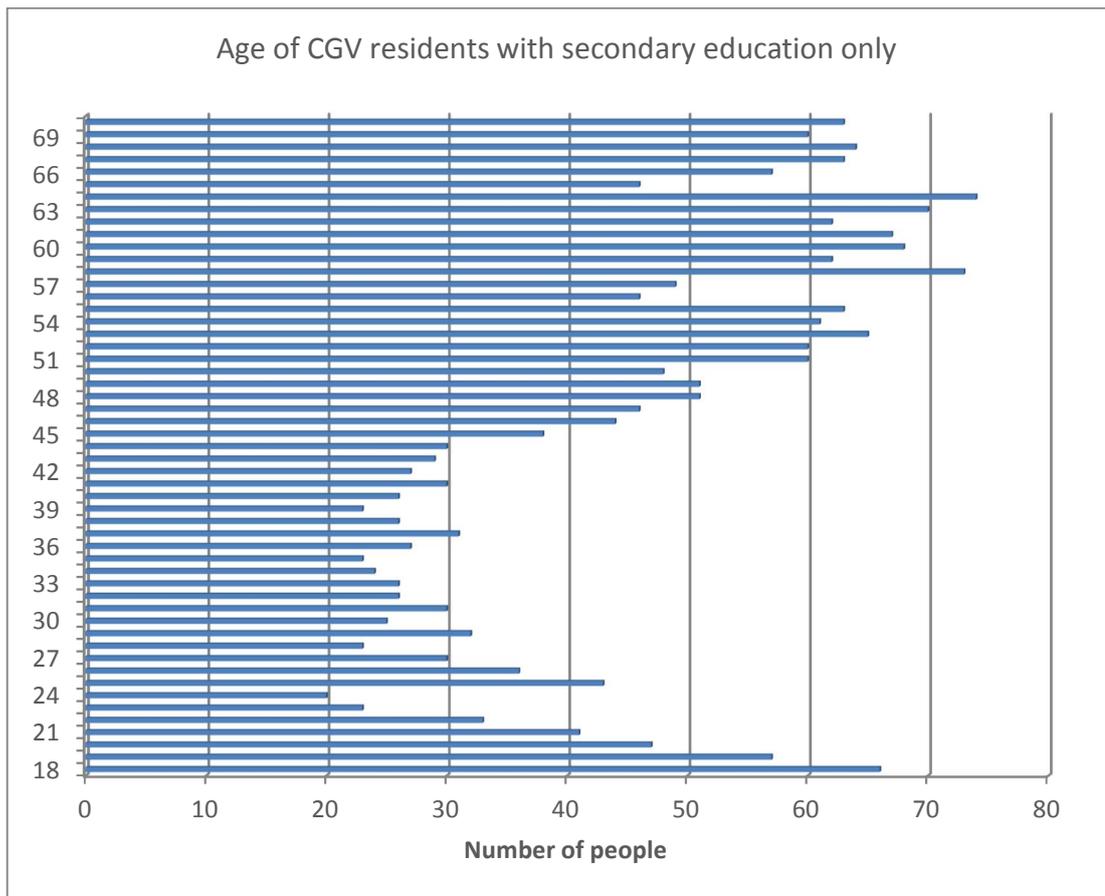
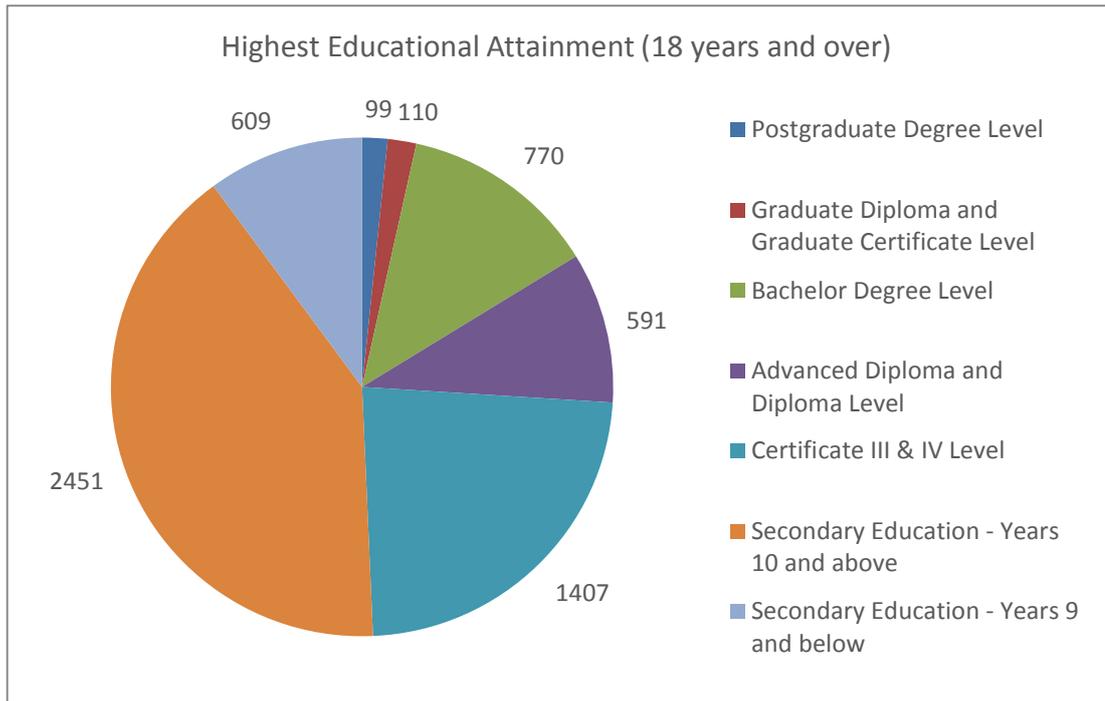


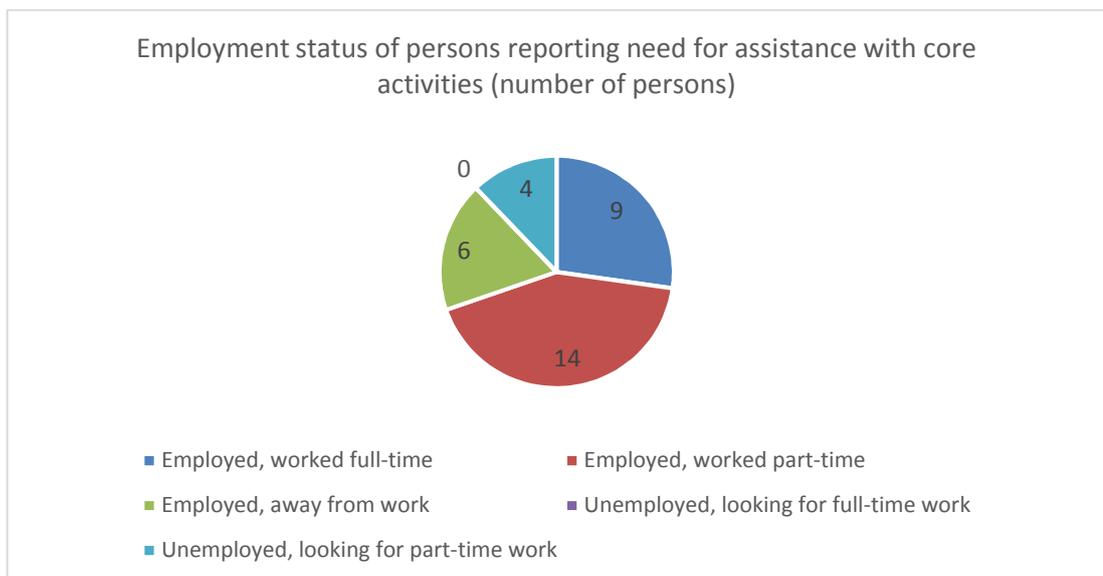
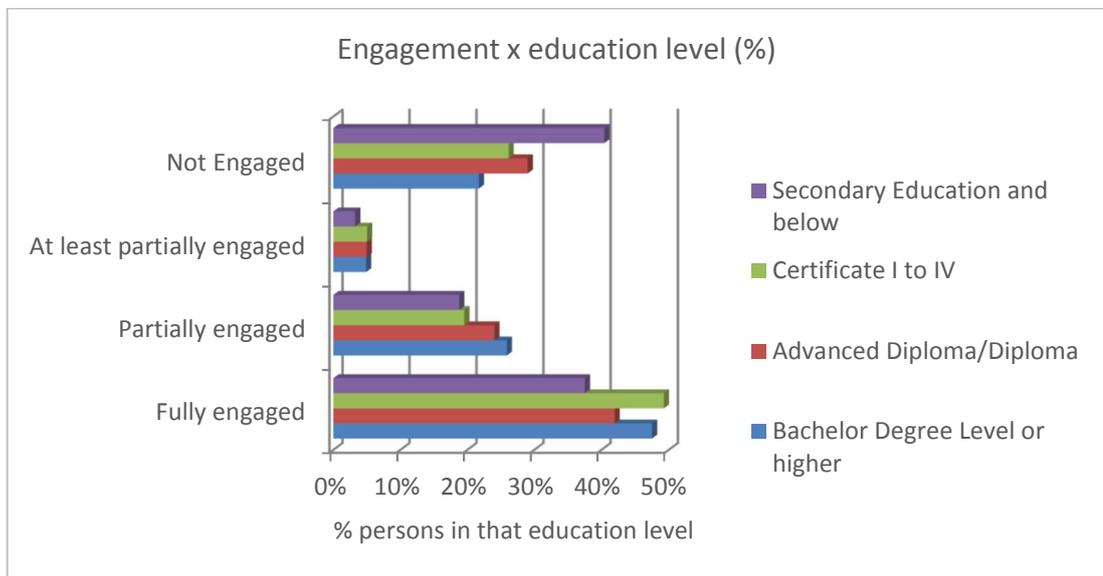
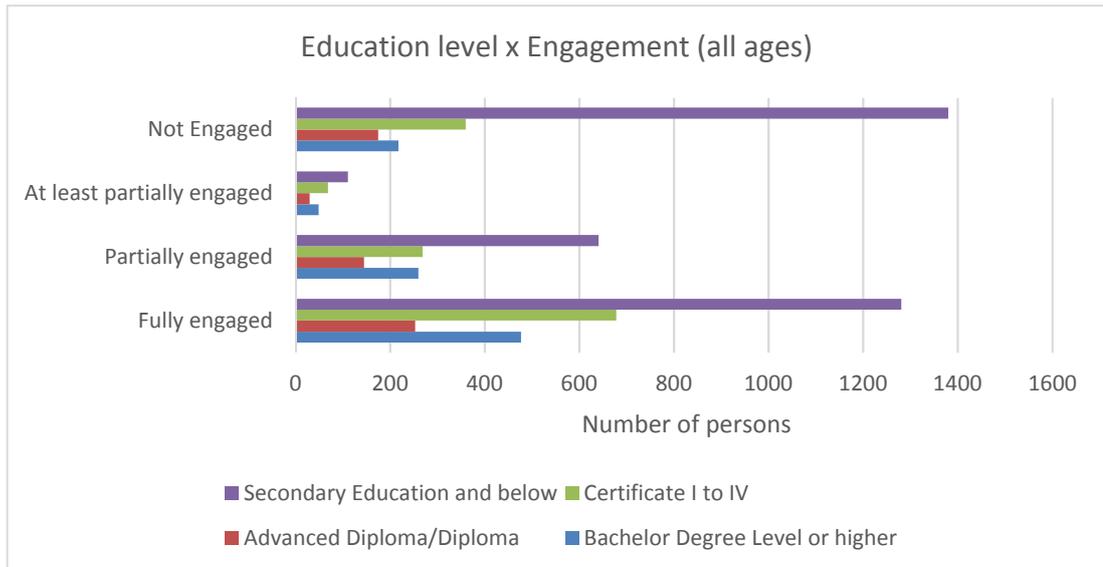
Usual address 5 years ago indicator	Same as in 2016	Elsewhere in Australia	Overseas in 2011	Not stated
5453, SA	2669	1615	59	319
5415, SA	123	79	0	12
5452, SA	269	128	8	14
5414, SA	79	38	0	22
5451, SA	351	239	12	77
5411, SA	184	84	0	33
5412, SA	713	344	9	77
5413, SA	534	176	0	77
5416, SA	146	66	0	16
5410, SA	200	65	0	37
Total	5273	2828	90	679

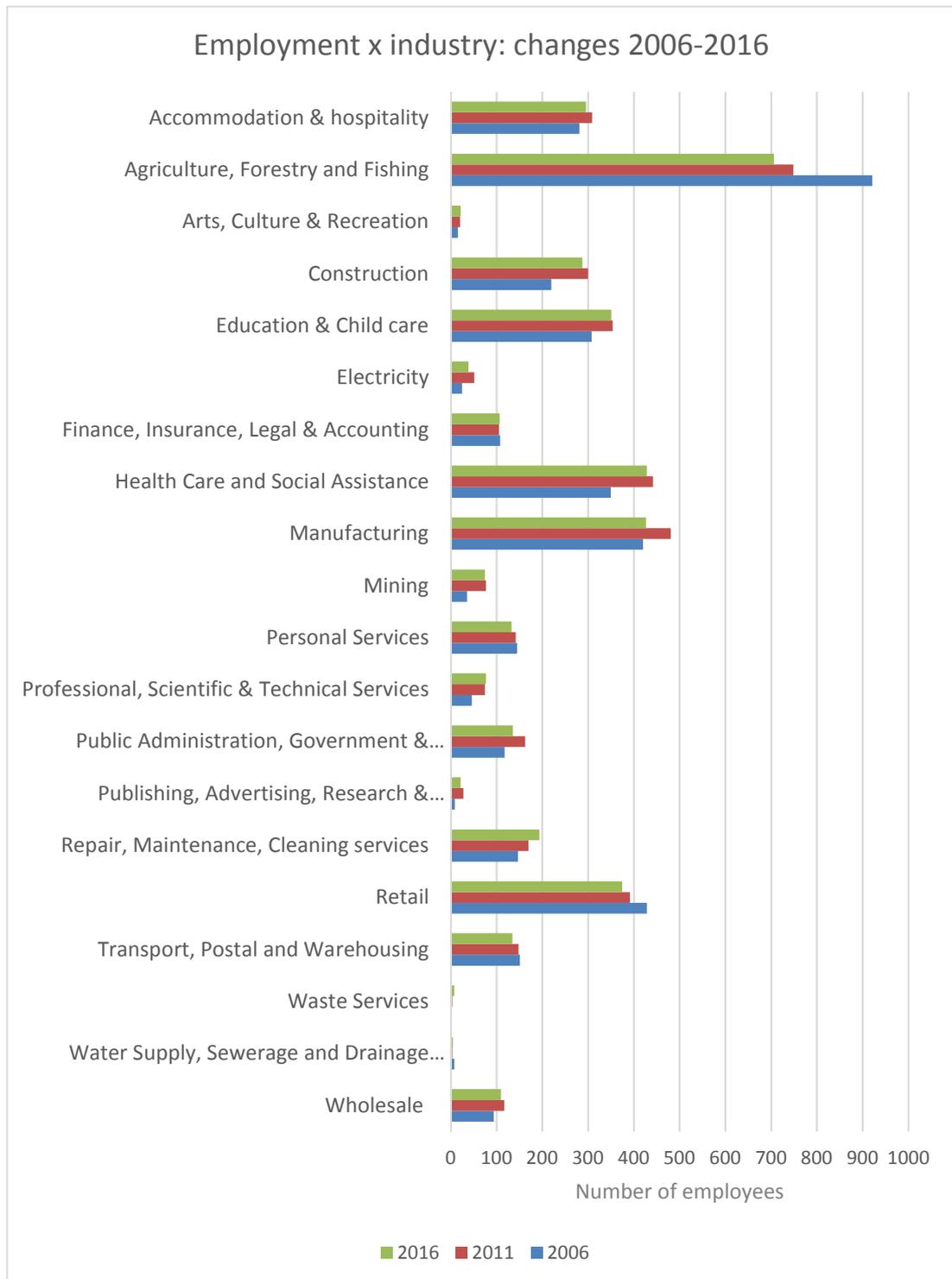


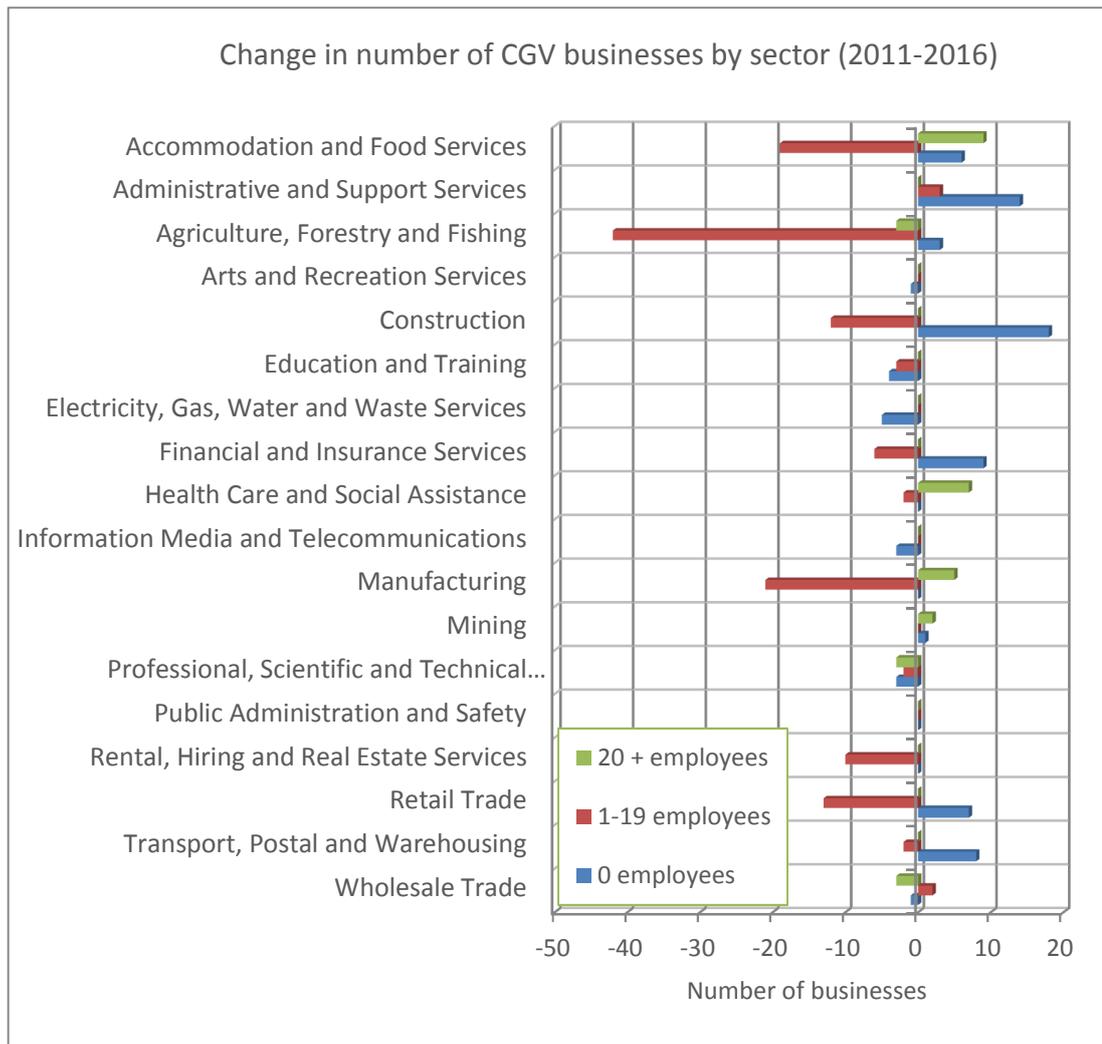






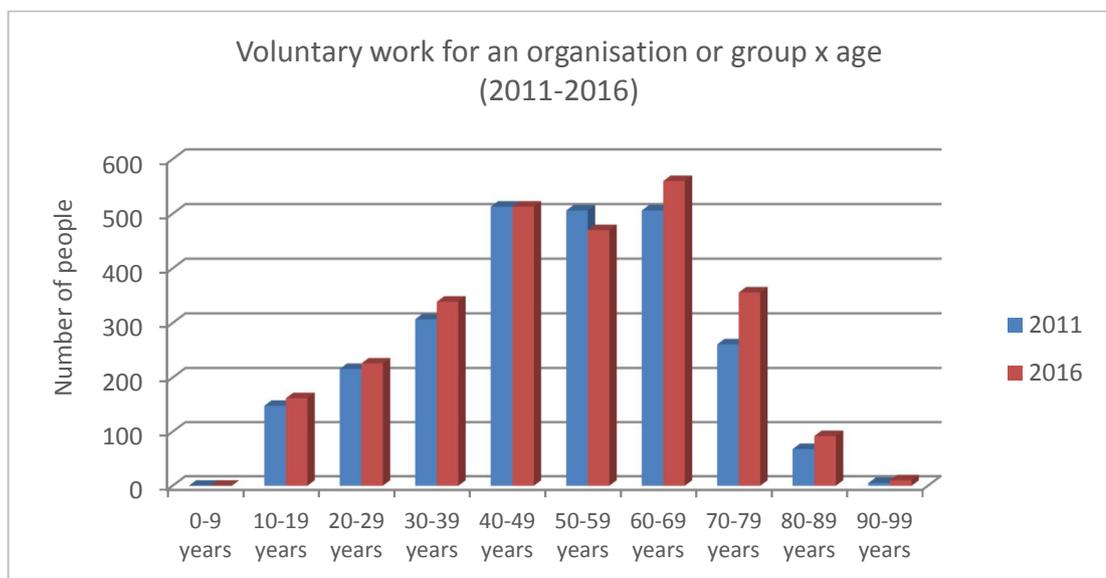
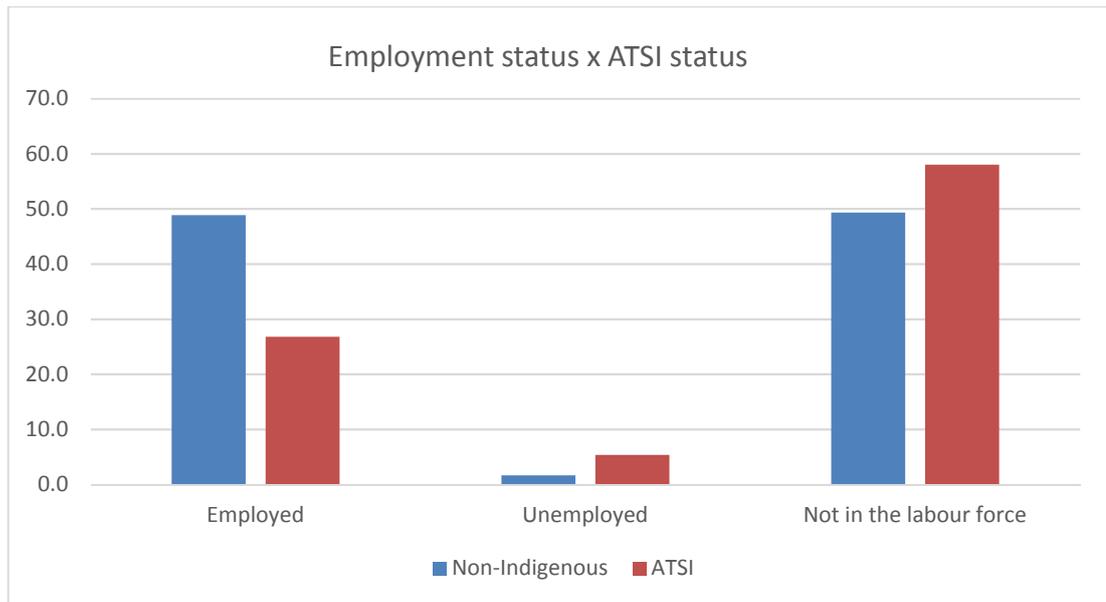




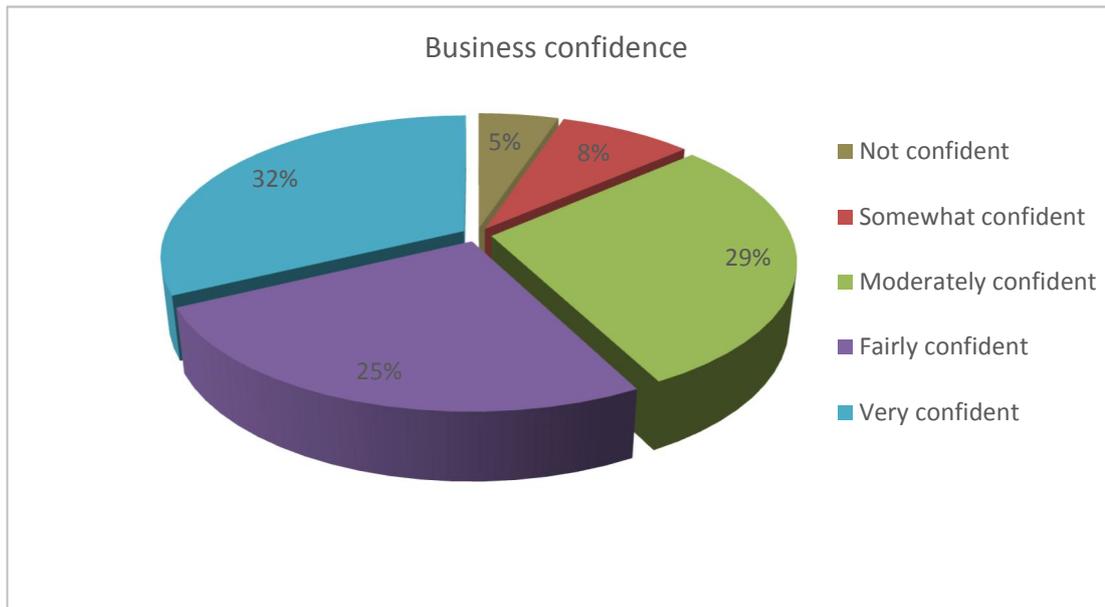


Employed, worked full-time	Employed, worked part-time	Employed, away from work	Unemployed, looking for full-time work	Unemployed, looking for part-time work	Not in the labour force
2345	1518	292	93	61	2599





RDA YMN Business Survey 2018



.id community

Clare & Gilbert Valleys Council - Gross Regional Product



Source: National Institute of Economic and Industry Research (NIEIR) ©2016
 Compiled and presented in economy.id by .id the population experts



RDA YMN Roadmap actions

These actions have been summarised from the *RDA YMN Regional Roadmap 2018-2028*, Section 5.1 Regional Focus.

Focus 1 Infrastructure and technology	Focus 2 Value adding and innovation	Focus 3 People and skills	Focus 4 Healthy environments	Focus 5 Sustainable and productive primary production	Focus 6 Local services for local people	Focus 7 Growing and diverse populations	Focus 8 Younger people living working and investing in the region
Community and event facilities Solar and wind power and energy infrastructure Water planning	Cluster development Agricultural growth Investment in R&D Champion local producers Establish and industry advisory board	Support Aboriginal people to gain skills and employment Remove barriers to training Maximise use of training facilities Increase apprenticeship commencements Leadership programs Improve school-work transition	Develop opportunities to experience natural environments Investigate rewilding Encourage best practice in land management Encourage investment in nature based tourism	Increase water re-use Land use planning that supports primary industry Support innovative agricultural technology and practices Support research into new varieties Support value add initiatives	Develop businesses cases for new services Regional service hubs Incentives for new businesses Better access to further education	Ensure adequate social infrastructure Diverse employment to attract population Build on local lifestyle to retain residents Support and celebrate volunteering Promote the unique identities of our towns	Support loan and scholarship programs to assist young people to access further education and return to the region Attract a university to the region Provide diverse employment and career opportunities



Survey responses: Business attraction and investment

How to attract more business and investment	N° responses
Promote our lifestyle and business advantages	10
Beautify main streets	7
Better roads and signage	7
Land zoning/planning to encourage investment	7
Diverse high end tourism product (inc accommodation)	6
Vibrant main streets on weekends	6
Attract families through employment opportunity	5
Business networks and collaboration	5
Improved telecommunications	5
Attract and retain young people	3
Environmental sustainability	3
Large events	3
Marketing food, wine and activities in Adelaide	3
Shop local	3
Affordable commercial rents/property prices	2
Affordable housing	2
Better services in smaller towns	2
Business infrastructure (e.g. IT businesses)	2
Cheese, chocolate and distilleries	2
Encourage local produce	2
Highlighting art and culture	2
Micro grants to create new businesses	2
Recreational opportunities for children/families	2
Retirement/aged care facility	2
Tourism information (what's on)	2
Water affordability/allocation	2



Peter Ellyard's workshop: CGV preferred future 2030

In Clare & Gilbert Valleys Strategic Directions Report, 2012/13

The Year is 2030, and the Clare and Gilbert Valleys is characterised by the following eight (8) key themes:-

1. Updated industrial base of agriculture and tourism

- The area is a centre for climate change resilience - exported globally
- Energy use is 40% renewable in 2030 and 100% by 2050
- Soils are more fertile
- Organic waste is composted or pyrolysed – carbon credits
- There is a more diverse wine industry and increased production of 25%.

2. Tourism sector doubled

- The area has a more diverse tourism base
- The area is a centre for major events (with major event producer)
 - Food and wine, bicycle, horse, artisan, music, speakers that attract and speak to young people
 - Masters events for older people
 - Wellness events
- The number of bike trails in the district has doubled
- Tourists are motivated by:-
 - Appreciating nature
 - Appreciating culture and to find wellness
 - Experiencing convivial enjoyment
- New bike and horse trails with central event points
- Wellness retreats and practitioners.

3. Population growth

- Has grown by about 6,000 people to a total population of approximately 14,000 people
- Growth has been well planned and structured
- The growth/town boundaries of Leasingham and other small villages have been restricted
- Population has been attracted by a strong employment base, underpinned by:-
 - Educated and ambitious people
 - Creative cultural knowledge and activity
 - 21st Century economic base, with focus on:-
 - carbon farming
 - biochar production
 - composting and carbon trading



- wellness
- sustainable agricultural production
- A digitally based global economy with use of National Broadband Network.

4. A marvellous heritage

- That is based on retaining landscapes and built environments
- Celebrates its past heritage, but is made better via all new development being heritage compatible
- There is a centre for Heritage Compatible and Sustainable Design and Innovation in the district, that:-
 - Attracts designers, architects and builders world wide
 - Has a renowned Clare and Gilbert Valleys style, by:-
 - combining the values of the past historic relevance and beauty with 21st Century needs and functionality
 - promoting a major positive impact on the urban fringe policy
- Gateways now provide a convivial welcome in cars, bicycles and horses.

5. Environmental design

- All development has promoted innovation to maximise solar access for winter warmth and shading for summer, via:-
 - Natural systems
 - Landscaping techniques and shade
 - Building techniques
- Where possible development has integrated with the many trails and retail areas.

6. Attraction of young people (and catering for older people)

- The area has a younger population than the rest of Australia
- The area has a 21st Century community index:-
- To bring ambitious, creative and entrepreneurial people to the district
 - To grow the industrial base
 - That imports and exports knowledge via the National Broadband Network
 - That has promoted Young Leaders awards
 - That has introduced the Clare Artisans celebrations.

7. Attraction of younger school age children

- Schools have invited and enrolled students from around the world
- Young people have been attracted by the beauty and safety of the community
- The education industry has built a new school focussing on equestrian training



- The area is famous for equestrian events and competitions.

8. A place for conviviality and renewal

- The marketing plan titled, 'The home of Conviviality and Renewal' has delivered:-
 - People renewing themselves both personally and professionally
 - Work relationships and quality of the environment
- The area is a centre for healing, wellness, reflection and learning
- The area is a haven to attract investment and visitors, such as:-
 - The executive retreat at Martindale Hall linked to Universities
 - Mining and other industry groups who come to learn and be renewed
 - With a centre for Intercultural and Interreligious Harmony at Sevenhill - a world centre for conflict resolution, mediation and peace with a focus on all five major religions.



Spendmapp

While Spendmapp is in its early stages, it seems to provide data that fills a gap that local government currently has in understanding its local economy:

Spendmapp by Geographia (spendmapp.com.au) is a subscription based web platform designed to assist local government to track the local economy through resident and visitor spend. The data can be useful across a number of council departments.

Spendmapp data is based on transaction data from one of Australia's major banks. Data is available for the previous 15 months and includes transaction data with the location of the transaction at the LGA or suburb level depending on the subscription package. Spendmapp allows local government data in neighbouring areas to be compared, with the top locations of 'escape spend' included in reports.

The volume of spending by industry category is available on most subscriptions packages. Some packages also report on the impact spending has on employment and floor space, and economic and population profiling and modelling.

