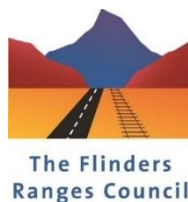


Flinders Ranges Economic Growth & Investment Strategy

Prepared on behalf of Regional Development Australia
Far North and The Flinders Ranges Council

Revised Report, January 2019



This report has been prepared on behalf of Regional Development Australia Far North and The Flinders Ranges Council



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Executive Summary



Executive Summary

Informed and Strategic Planning for Economic Development

Regional Development Australia Far North (RDAFN) and The Flinders Ranges Council commissioned the preparation of this Economic Growth and Investment Strategy to help address the Flinders Ranges Council Region's challenges and to capitalise on new opportunities for investment to support long-term growth.

The Flinders Ranges Council Region extends from the central townships of Quorn, Craddock and Hawker. The Flinders Ranges Economic Growth and Investment Strategy provides a comprehensive and up-to-date analysis of the region's economic stocks and flows - both in and out of the Flinders Ranges - identifying the local area's connections and interrelationships with the broader South Australian, national and global economies.

Specifically, the Economic Growth and Investment Strategy provides the evidence base to support the region's engagement with both State and Federal Governments on matters of regional significance that require further attention. It informs the short-term work planning of RDA Far North and The Flinders Ranges Council, as well as longer-term opportunities for economic development which need to be planned for now.

The Economic Growth and Investment Strategy promotes the notion that economic development is about the mutually-reinforcing and complementary relationship between improvements in economic activity, community wellbeing, cultural diversity, a sense of 'place' and the environment. Articulating how this holistic approach to economic development can directly translate into the organisational priorities of RDAFN and The Flinders Ranges Council, the Economic Growth and Investment Strategy informs a strategic and targeted approach to facilitate change towards a prosperous future.

Meeting the Challenges and Building Opportunities for Economic Growth

The Far North Region of South Australia is undergoing a period of unprecedented change and adjustment following the resources sector slowdown and the resulting reduction and cessation of mining in the Far North, where the bulk of South Australia's resources sector activity is located. In the wake of the mining industry slowdown, the Far North Region's reliance on mining has posed challenges for many parts of the region where resources sector activity is the backbone of the economy.

The Flinders Ranges however, with its relatively diverse economic base, has not been subject to the same extremes of resources sector peaks and troughs as other parts of the Far North Region have. Nevertheless, with mining the principal driver of wealth creation in the Far North, the Flinders Ranges is not immune to either its positive or adverse impacts. For this reason, the Flinders Ranges Council needs to plan a course of action to address challenges posed by economic dislocation and disturbance while also identifying and capitalising upon opportunities to build on comparative and competitive advantage.

The Flinders Ranges Council region is presented with a number of good prospects for economic growth and development based on existing attributes and opportunities to further diversify the

region's economic activity. The foundation of the region's natural comparative advantage is the scenic appeal of the Flinders Ranges itself, which is the largest mountain range in South Australia and includes a number of protected areas including the Ikara-Flinders Ranges National Park, the Mount Remarkable National Park in the southern part of the region, the Arkaroola Protection Area at the northern end of the ranges, The Dutchmans Stern Conservation Park, west of Quorn and the Mount Brown Conservation Park, south of Quorn.

Tourism is the region's principal economic driver, accounting for the largest share of the region's industry output, jobs and exports. The Flinders Ranges' tourism industry has a solid base and potential for growth, as national and international market trends support opportunities to capitalise on demand for outback experiences and historical attractions. Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail and transport. Importantly, the tourism industry has strong linkages to other industries in the local economy.

A traditional mainstay of The Flinders Ranges Council region's economy, agriculture, which is based on sheep, grains and beef cattle production, remains an important contributor to economic activity in the region. The sector's historical significance is also a feature of the Flinders Ranges' tourism offer, with a number of old pastoral homesteads dotted around the region's arid landscape providing points of interest for the many visitors who either pass through or stay in the region to explore.

The importance of sheep and wheat farming in particular, along with copper mining (copper was mined in the Hawker-Flinders Ranges area in the late 1850s), induced the government of the day to build a narrow gauge railway line north of Port Augusta through Pichi Richi Pass, Quorn, Hawker and along the west of the ranges, eventually to Marree. Today, the Pichi Richi Railway is a prominent feature of the Flinders Ranges visitor experience.

The aesthetic appeal of The Flinders Ranges Council area and the region's heritage towns and settlements such as Hawker and Quorn also serve to attract residents looking for a quality outback lifestyle within commuting distance of Port Augusta.

The relative economic diversity of The Flinders Ranges Council region (compared to other parts of the Far North) is reflected in the strength of its services industries, with the health care and education sectors both accounting for a large share of the region's industry output and employment.

The Flinders Ranges Council region also offers potential for new industries to grow on the back of a long tradition of creative industries activity in the area. The rugged beauty of the region's natural landscape also serves as the basis for the Flinders Ranges' heritage in television and feature film making with many notable productions having been shot in the region over the years, providing a welcome boost to local economic activity.

In order to capitalise on new opportunities for growth, the Flinders Ranges Economic Growth and Investment Strategy puts in place an informed and strategic plan of action. It identifies activities and projects which will have immediate, medium and long-term economic benefits for the communities of the region. It highlights planning and project priorities to facilitate change towards a robust and sustainable economic future for The Flinders Ranges Council region.

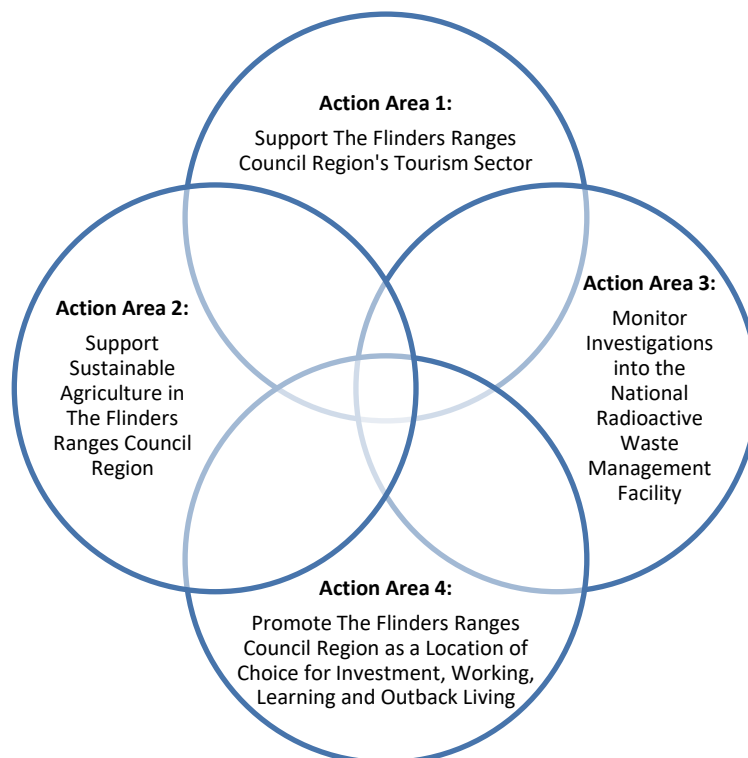
Strategy Themes and Actions

The Flinders Ranges Economic Growth and Investment Strategy is defined by five principles which guide the preparation and implementation of the strategy actions. In essence, it:

1. Prioritises initiatives and activities that support the development of **tourism** in the Flinders Ranges, promoting collaboration amongst government agencies and industry stakeholders to enhance regional branding, marketing, product development, visitor servicing and support infrastructure.
2. Encourages initiatives and activities that support the growth and sustainable development of the Flinders Ranges Council Region's **traditional agricultural industries**.
3. Pro-actively **promotes The Flinders Ranges Council region to prospective investors**, using a strategic, informed and targeted approach.
4. Focuses on activities where there are likely to be **positive and measurable outcomes** for the community and long-term strategic economic benefits.

The Economic Growth and Investment Strategy provides the framework and directions for economic development, with the focus being on 31 individual actions across four strategic activity areas that can be achieved over the next three years. The Action Areas, which have been informed by the research, consultation and analysis undertaken to prepare this Strategy, are illustrated below.

Flinders Ranges Economic Growth and Investment Strategy Themes



In summary, the actions are:

Support the Flinders Ranges' Tourism Sector

Tourism Support Infrastructure

- 1.1 Continue to review, assess and prioritise The Flinders Ranges Council region's strategic regional road upgrade needs using standard assessment criteria; agree on priorities and advocate needs to State and Federal Governments.
- 1.2 Continue to collaborate with relevant State and Federal Government departments and agencies to progress the Strzelecki Track upgrade and sealing project proposal.
- 1.3 Prepare a regional wayfinding signage strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region.
- 1.4 Continue to work together to provide a positive climate for private sector investment in new and upgraded accommodation as per the 2020 regional target: upgrade 90 rooms from 3-star to 4-star standard and build 230 new rooms with 25% of 4-star and higher.
- 1.5 Advocate relevant government agencies to build the infrastructure required, such as aerodrome upgrades, to support the potential for regional South Australia as an aviation destination.
- 1.6 Investigate opportunities to reduce operating costs for public and private aerodromes and airstrips in the Flinders Ranges and Outback through a group insurance scheme and / or through Government underwriting.
- 1.7 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
- 1.8 Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Flinders Ranges and the Outback through support for the Blackspots Program and other programs as they become available.
- 1.9 Support The Flinders Ranges Council in its efforts to work with SA Power Networks on a solution to stabilise power supply in the Flinders Ranges.
- 1.10 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn.

Tourism Sector Business Support

- 1.11 Continue to provide business development support to traditional and non-traditional tourism businesses in The Flinders Ranges Council region.
- 1.12 Develop and promote a customer service strategy / campaign for the Flinders Ranges and Outback, targeting both traditional and non-traditional tourism businesses.

Tourism Product and Experience Development

- 1.13 Continue to support FRTOA in its efforts to fund and conduct a feasibility study into the development of a geological interpretative centre in Hawker.
- 1.14 Work with tourism agencies and operators to explore opportunities to develop and promote geo-tourism linkages between the Flinders Ranges and the Outback. Hold discussions with SATC regarding the potential to develop further linkages with the 'Dinosaur Trail' in the Queensland Outback.
- 1.15 Work with the Pichi Richi Railway Preservation Society on progressing a concept and feasibility study into the development of a Pichi Richi Railway interpretative centre.
- 1.16 Explore opportunities to promote the Flinders Ranges' history of film on location as a tourism drawcard.

Tourism Sector Collaboration and Co-ordination

- 1.17 Continue to encourage an integrated approach between tourism stakeholders to leading and managing the sector and develop ways to build the self-sustainability of the region's tourism management structure.
- 1.18 Work with FRTOA, FROSAT, the SATIC, the SATC and other key agencies to resource and implement a regional coordinated marketing approach to tourism.
- 1.19 Conduct regional tourism expos / tourism exchanges to showcase what is available in the broader region to operators in the Flinders Ranges and the Outback. Consider the feasibility of holding these in the low season to maximise opportunities for participation by operators and involve non-traditional tourism businesses where possible.
- 1.20 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience.

Support Sustainable Agriculture in The Flinders Ranges Council Region

- 2.1 Ensure that relevant land use planning policies for The Flinders Ranges Council region reflect and support a key principle of the South Australian Government's Far North Region Plan (2010) to "retain and strengthen the economic potential of pastoral lands".
- 2.2 Continue to provide business advisory services to pastoralists looking to diversify into tourism and other businesses.
- 2.3 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in The Flinders Ranges Councils' investment prospectus material as a key competitive advantage.
- 2.4 Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Outback through support for the Blackspots Program and other programs as they become available.

Monitor Investigations into the National Radioactive Waste Management Facility

- 3.1 Continue to work with relevant government agencies and other stakeholders in progressing current and subsequent phases of the National Radioactive Waste Management Facility project investigations.

Promote The Flinders Ranges Council Region as a Location of Choice for Investment, Working, Learning and Outback Living

- 4.1 Continue to work with relevant government agencies and other stakeholders in progressing current and subsequent phases of the National Radioactive Waste Management Facility project investigations.
- 4.2 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
- 4.2 Continue to actively pursue the extension of mobile and satellite phone coverage throughout The Flinders Ranges Council region through support for the Blackspots Program and other programs as they become available.
- 4.3 Support The Flinders Ranges Council in its efforts to work with SA Power Networks on a solution to stabilise power supply in the Flinders Ranges.
- 4.4 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn or alternative solutions for treated water.
- 4.5 Facilitate discussions between area schools in The Flinders Ranges Council region and local business operators on opportunities to strengthen the alignment between vocational education and training and the region's economic growth and investment opportunities, particularly tourism.
- 4.6 Continue to support the capacity development of regional business operators through access to business advisory services. Explore opportunities to resource a regular program of business development workshops throughout the Flinders Ranges and Far North Region.

Priorities for Action – Informing a Year 1 Work Plan

Priority projects and activities for implementation as part of a Year 1 work plan are identified based on the application of two broad set of assessment criteria – *benefit assessment* and *capacity to implement*. They represent activities that RDAFN and The Flinders Ranges Council should advance (in association with identified partners where relevant) as short-term priorities.

The Year 1 priorities are:

1. Continue to review, assess and prioritise The Flinders Ranges Councils' strategic regional road upgrade needs using standard assessment criteria; agree on priorities and advocate needs to State and Federal Governments.
2. Continue to collaborate with relevant State and Federal Government departments and agencies to progress the Strzelecki Track upgrade and sealing project proposal.

3. Prepare a regional wayfinding signage strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region.
4. Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
5. Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Flinders Ranges and the Outback through support for the Blackspots Program and other programs as they become available.
6. Continue to provide business development support to traditional and non-traditional tourism businesses in The Flinders Ranges Council region.
7. Continue to provide business advisory services to pastoralists looking to diversify into tourism and other businesses.

In progressing these actions, cultivating collaborative partnerships will be key.

Continuing Collaborative Partnerships for Effective Implementation

Promoting economic growth and investment in The Flinders Ranges Council region requires both leadership and the formation of partnerships.

Using the Economic Growth and Investment Strategy as a plan of action, RDA Far North and The Flinders Ranges Council will take the lead, working together with other stakeholders to address opportunities for improved integrated planning and management concerning matters arising from the interface of natural resources management, economic development and community wellbeing.

To this end, the Economic Growth and Investment Strategy guides the efforts of RDA Far North and The Flinders Ranges Council to facilitate opportunities for investment to support long-term growth. Using the evidence presented in this report (the economic stocks and flows analysis), it also supports the region's engagement with both State and Federal Governments on matters of significance.

1. Introduction



1. Introduction

1.1 Strategy Background

Regional Development Australia Far North (RDAFN) and The Flinders Ranges Council commissioned the preparation of this Economic Growth and Investment Strategy to help address the Flinders Ranges Council Region's challenges and to capitalise on new opportunities for investment to support long-term growth.

The Flinders Ranges Council region extends from the central townships of Quorn, Craddock and Hawker. The Flinders Ranges Economic Growth and Investment Strategy provides a comprehensive and up-to-date analysis of the region's economic stocks and flows - both in and out of the Flinders Ranges - identifying the local area's connections and interrelationships with the broader South Australian, national and global economies.

Informed by a comprehensive analysis of the local and regional economies, a review of the economic development policy and strategy environment and targeted consultation with selected stakeholders, the Economic Growth and Investment Strategy identifies future activities and 'focal' areas in support of the economic growth and development in The Flinders Ranges Council Region.

The Flinders Ranges and the wider Outback Region of South Australia (the Outback) is undergoing a period of unprecedented change and adjustment following the resources sector slowdown and the resulting reduction and cessation of mining in the Far North Region, where the bulk of South Australia's mining activity is located. The scale of subsequent job losses highlights the vulnerability of the region to a downturn in mining, with the majority of local industry activity directly or indirectly dependent on the prosperity of the resources sector.

In the wake of the mining industry slowdown, the Far North's reliance on mining has posed challenges for many parts of the region where mining activity is the backbone of the economy.

The Flinders Ranges Council region however, with its relatively diverse economic base, has not been subject to the same extremes of resources sector peaks and troughs as other parts of the Far North Region have. Nevertheless, with mining the principal driver of wealth creation in the Far North, the Flinders Ranges Council region is not immune to either its positive or adverse impacts. For this reason, The Flinders Ranges Council needs to plan a course of action to address challenges posed by economic dislocation and disturbance while also identifying and capitalising upon opportunities to build on comparative and competitive advantage.

The Flinders Ranges Council is presented with a number of good prospects for economic growth and development based on existing attributes and opportunities to further diversify the region's economic activity. The foundation of the region's natural comparative advantage is the scenic appeal of the Flinders Ranges itself, which is the largest mountain range in South Australia and includes a number of protected areas including the Ikara-Flinders Ranges National Park, the Mount Remarkable National Park in the southern part of the region, the Arkaroola Protection Area at the northern end of the ranges, The Dutchmans Stern Conservation Park, west of Quorn and the Mount Brown Conservation Park, south of Quorn.

Tourism is The Flinders Ranges Council region's principal economic driver, accounting for the largest share of the region's industry output, jobs and exports. The Flinders Ranges' tourism industry has a solid base and potential for growth as national and international market trends support opportunities to capitalise on demand for outback experiences and historical attractions. Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail and transport. Importantly, the tourism industry displays strong linkages to other industries in the local economy.

A traditional mainstay of The Flinders Ranges Council region's economy, agriculture, which is based on sheep, grains and beef cattle production, remains an important contributor to economic activity in the region. The sector's historical significance is also a feature of the Flinders Ranges' tourism offer, with a number of old pastoral homesteads dotted around the region's arid landscape providing points of interest for the many visitors who either pass through or stay in the region to explore.

The importance of sheep and wheat farming in particular, along with copper mining (copper was mined in the Hawker-Flinders Ranges area in the late 1850s), induced the government of the day to build a narrow gauge railway line north of Port Augusta through Pichi Richi Pass, Quorn, Hawker and along the west of the ranges, eventually to Marree. Today, the Pichi Richi Railway is a prominent feature of the Flinders Ranges visitor experience.

The aesthetic appeal of The Flinders Ranges Council region and its heritage towns and settlements such as Hawker and Quorn also serve to attract residents looking for a quality outback lifestyle within commuting distance to work and education in nearby Port Augusta. The relative economic diversity of The Flinders Ranges Council region (compared to other parts of the Far North) is reflected in the strength of its services industries, with the health care and education sectors both accounting for a large share of the region's industry output and employment.

The Flinders Ranges Council region also offers potential for new industries to grow on the back of a long tradition of creative industries activity in the area. The rugged beauty of the region's natural landscape also serves as the basis for the Flinders Ranges' heritage in television and feature film making, with many notable productions having been shot in the region over the years, providing a welcome boost to local economic activity.

In order to address the challenges and to capitalise on new opportunities for growth, the Flinders Ranges Economic Growth and Investment Strategy puts in place an informed and strategic plan of action.

1.2 Strategy Purpose

The Flinders Ranges Economic Growth and Investment Strategy addresses the region's economic development challenges and prospects with a focus on providing opportunities for investment to support long-term economic development. It includes a comprehensive and up-to-date analysis of the region's economic stocks and flows - both in and out of the region - identifying The Flinders Ranges Council region's connections and interrelationships with the broader South Australian, national and global economies.

The Economic Growth and Investment Strategy provides the evidence base to support the region's engagement with both State and Federal Governments on matters of regional significance that require further attention. As well as identifying priorities for the future, the Strategy articulates the role of RDA Far North and The Flinders Ranges Council in facilitating economic development and

attracting investment to ensure growth in The Flinders Ranges Council region is managed and sustainable.

By taking an informed, strategic and targeted approach to the identification of opportunities and priorities for growth, the Economic Growth and Investment Strategy informs the short-term work planning of RDA Far North and The Flinders Ranges Council, as well as longer-term opportunities for economic development which need to be planned for now.

1.3 Strategy Outcomes

The Economic Growth and Investment Strategy identifies activities and projects which will have immediate, medium and long-term economic benefits for the communities of The Flinders Ranges Council region. It highlights planning and project priorities to facilitate change towards a robust and sustainable economic future for the region.

By documenting the region's economic stocks and flows, the Economic Growth and Investment Strategy informs a targeted approach to project selection to maximise the economic benefits of any form of funding packages or other resources directed to the region within The Flinders Ranges Council's boundary.

In short, the Economic Growth and Investment Strategy:

1. Provides an understanding of how The Flinders Ranges Council region connects economically and socially and the interdependencies across local communities;
2. Shows how the region contributes to the state and national economies and the level of outflow or leakage from the region to other centres such as Adelaide;
3. Identifies projects that have good prospects to contribute positive employment outcomes for the Flinders Ranges and which should help improve economic diversification and links to regional growth sectors;
4. Identifies priority infrastructure needs to enable economic development to occur; and
5. Informs how funding and other resources that may come into the Flinders Ranges need to be targeted to maximise positive investment, economic development and employment outcomes.

The Economic Growth and Investment Strategy identifies the Flinders Ranges' existing and potential supply chain links, between local business and industry and economic activity located external to the region. It recognises and promotes the region's strategic comparative and competitive advantages and its 'investment-ready' projects, in key sectors or areas of activity which build on this advantage.

In this regard, the Economic Growth and Investment Strategy reflects the vision and strategic priorities for the region and it articulates the Flinders Ranges' attributes and challenges. This ensures The Flinders Ranges Council and RDA Far North have the information and resources in place to prioritise activities and pro-actively seek-out and facilitate new investment and economic activity.

This is one of five economic growth and investment strategies that have been prepared for the Far North Region of South Australia. The Flinders Ranges Economic Growth and Investment Strategy, along with those prepared for Coorber Pedy, Roxby Downs, Port Augusta and the Outback Communities Authority Region will inform regional priorities and a renewed Regional Roadmap for the Far North. It will also guide RDA Far North's short-term work planning across its various operational streams of activity, for the following 12 months.

1.4 Strategy Framework

Addressing the Determinants and Enablers of Economic Development

The Flinders Ranges Economic Growth and Investment Strategy recognises ‘economic development’ as the continuous process of growing the region’s level of income and capital (wealth) and distributing that wealth (through expenditure and employment) to the community. While measured in terms of income (or gross regional product) and employment, economic development also encapsulates improvements in education, health, culture, community wellbeing, a sense of place and the environment.

Efforts to stimulate economic growth and investment in The Flinders Ranges Council region must be cognisant of the determinants and enablers of regional economic development. These provide the ‘pre-conditions’ for prosperous businesses and a healthy economy and they are the foundations upon which economic interaction and exchange takes place.

While there is no uniformly-agreed definition of what constitutes the determinants or enablers of economic development, broadly-speaking, they include:

1. Regional Comparative Advantage and Business Competitiveness;
2. Human Capital (Skills);
3. Strategic Infrastructure;
4. Access to Local, National and International Markets; and
5. Effective Regional Partnerships.

Each is explained in turn below.

Regional Comparative Advantage and Business Competitiveness

Comparative advantage is an area of relative strength or specialisation. Efforts to develop regional economies are most successful when they focus on building on such strengths. Businesses can also use a region’s comparative advantage to build a competitive advantage, which is developed through the combination of factors such as knowledge, resources, skills and the ability to innovate.

A region’s comparative advantage can stem from various sources, such as its geographic location, availability of natural resources, the existence of industry clusters, access to infrastructure or the skill profile of the local population. These underlying attributes influence the types of economic activity that are likely to be successful. They also have implications for development initiatives, which are generally more effective where they build on an existing strength.

A critical input to The Flinders Ranges Council region’s economy, and central to the its competitiveness, is its natural resources and its natural beauty. Much of the economic activity in regional Australia is directly linked to local natural resources. The Regional Australia Institute (2015) asserts that access to natural resources can create economic opportunities through offering inputs to production (such as access to water or good quality soil) and can be used to generate production outputs or as a foundation for services such as tourism and recreation.

It follows then that natural resource management is critical to developing and maintaining a comparative economic advantage as it underpins The Flinders Ranges Council region’s ‘driver’ industries of tourism and agriculture. Key inputs to these industries include conservation of biodiversity, management of regional landscapes, water quality, soil quality, water planning and management. These, in-turn, contribute to key outputs that include visitor experiences and

satisfaction, management of agricultural industry impacts and sustainable water resources for communities.

Building on existing attributes does not mean The Flinders Ranges Council region cannot diversify its economy. Rather, the communities of the region can benefit if it can leverage its natural assets and strengthen current areas of specialisation, and diversify by developing new ways to capitalise on these assets, resources and knowledge.

Human Capital (Skills)

Human capital is the stock of knowledge, expertise and abilities of a region's population. It is one of the most important inputs to economic activity because it is crucial to supporting local businesses to be competitive and drive economic growth. Businesses need access to workers with appropriate skills. Access to human capital is influenced by workforce participation and the mobility of labour.

Developing a skilled and educated workforce assists with building the resilience of the local economy. Individuals with greater education and skills can pursue a wider range of employment opportunities and adapt to new processes and technologies which enhances productivity and improves living standards.

An appropriately skilled and educated workforce can help places such as the Flinders Ranges take advantage of new opportunities, overcome challenges and make the region more attractive to investment.

Government agencies and organisations such as RDA Far North and employment service providers can play a role in supporting the development of local skills to meet industry needs. For example, they can liaise with local businesses (and prospective new investors in the region) to identify apparent labour shortages or skills gaps, and engage with education and training providers to help fill those gaps.

Strategic Infrastructure

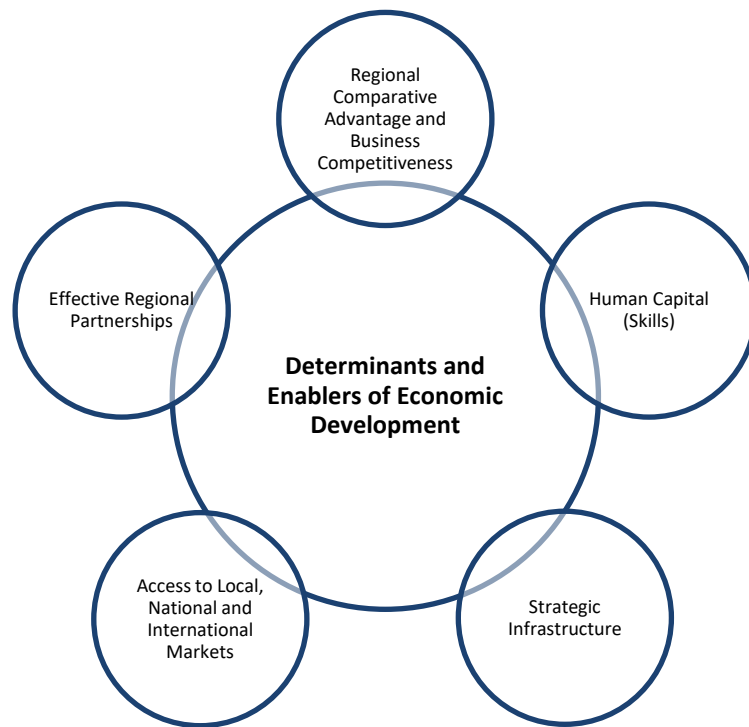
Efficient and effective infrastructure underpins economic activity and is fundamental to a prosperous regional economy. It includes 'physical' infrastructure (like roads, seaports and airports, information technology and telecommunications, power and water) and quality 'community' infrastructure (like recreation and leisure facilities, cultural services and facilities and community services and facilities).

Together these elements should offer good physical and functional links that support social, cultural and economic interaction and exchange in the community.

RDA Far North, The Flinders Ranges Council, government agencies and service providers can help ensure these fundamentals for investment and economic development are addressed by identifying the region's infrastructure challenges and shortfalls, and liaising with private infrastructure and service providers on matters of regional significance and opportunities for development.

Identifying The Flinders Ranges Council region's infrastructure investment priorities is essential if economic development opportunities are to be strategically pursued and to ensure any critical gaps can be addressed.

Figure 1. Determinants and Enablers of Economic Development



Source: SC Lennon & Associates

Access to Local, National and International Markets

Access to international, national and local / regional markets includes access to trading partners, clients and labour. Improving The Flinders Ranges Council region's access to markets will broaden trade, allow both existing and potential new competitive industries to grow and increase the availability of goods and services to the communities of the region.

Access to markets is facilitated by physical and non-physical connections. Reducing transport costs can improve physical access to markets and enable businesses to move goods more quickly. Other 'soft' infrastructure, such as strong business relationships and networks, supported by good access to quality communications technology, is equally important.

Some businesses, by their nature, are focused on the local market. For example, demand for retail and personal services is driven by local consumption. Hence local retailers will typically serve specific local needs and focus on relatively small local markets. These businesses are important and should be encouraged. Other industries like tourism for example, are outward-oriented and have stronger export potential. Growth in these sectors is greatly aided by building connections to larger trade markets throughout the Far North Region, South Australia and beyond.

Greater access to markets provides local businesses with opportunities to grow by trading more goods and services. Producing on a larger scale can help local businesses to bring down their costs through economies of scale, making them more competitive.

Importantly, greater access to markets opens the door to new investment and innovation, through the sharing of information, knowledge and technology.

Effective Regional Partnerships

Promoting partnerships and collaborative regional planning is the key to successful implementation of activities, projects and initiatives designed to meet priorities for economic development. No one agency can be all things to all people and no one level of government can fully respond to the diverse needs and circumstances of the communities of The Flinders Ranges Council. Hence, collaborative partnerships - between The Flinders Ranges Council, RDA Far North and others - are essential for co-ordinating the activities and investments of different stakeholders.

The Flinders Ranges Economic Growth and Investment Strategy and the activities which inform it play an important role in articulating a shared understanding of the region's social, environmental and economic development priorities and opportunities for investment.

As noted above, a critical input to the region's economy, and central to its competitiveness, is its natural resources. South Australian Arid Lands Natural Resource Management (SAAL NRM) is the organisation responsible for ensuring the sustainable use of the region's resources, including water, soils, plants and animals. As articulated on the SAAL NRM website, the natural systems and human activities in the region make it fundamentally different from other NRM regions in South Australia, containing a greater percentage of intact ecosystems and natural biological diversity than any other region in the State.

Engaging SAAL NRM (and others) will therefore be critical to facilitating and promoting a holistic approach to sustainable economic development. Effectively promoting and facilitating economic development in The Flinders Ranges Council Region will require all stakeholders to work in partnership to focus on the challenges and opportunities for the region and its communities. To do this effectively requires a strategic, informed and targeted approach.

The recommended actions presented in this Strategy are themed, each theme reflecting the region's priorities as informed by the research, data analysis and targeted consultation with selected stakeholders. Importantly, the actions presented under each theme reflect the roles and capacities of RDA Far North and The Flinders Ranges Council by focussing on those determinants and enablers of regional economic development which each organisation can influence, to varying degree, either in its own right or in collaboration with others.

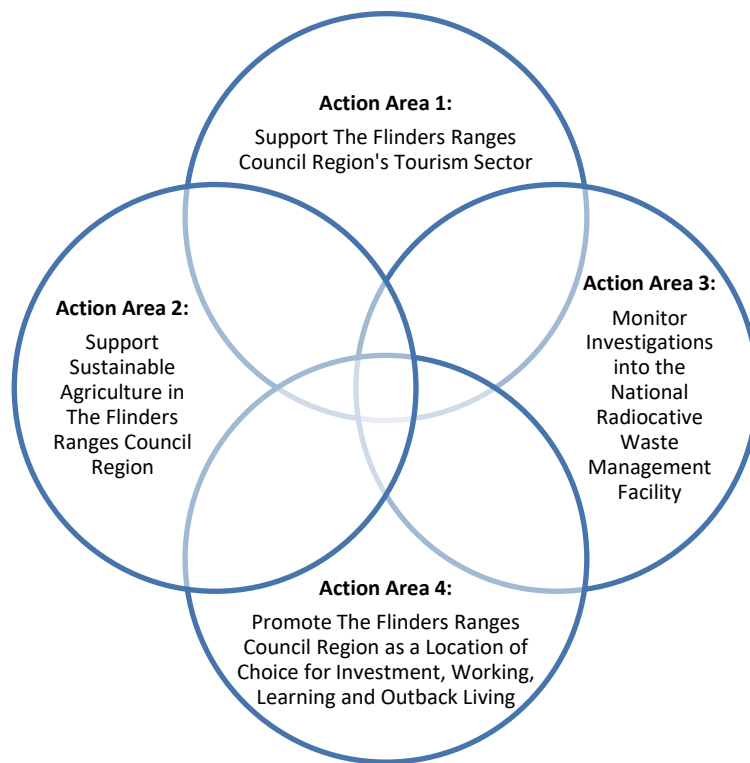
Economic Growth and Investment Strategy Themes

The Flinders Ranges Economic Growth and Investment Strategy responds to RDA Far North's and The Flinders Ranges Council's commitment to promoting and facilitating economic development. It is defined by a set of principles which guide the preparation and implementation of the proposed actions. In essence, the Economic Growth and Investment Strategy:

1. Prioritises initiatives and activities that support the development of **tourism** in the Flinders Ranges, promoting collaboration amongst government agencies and industry stakeholders to enhance regional branding, marketing, product development, visitor servicing and support infrastructure.
2. Encourages initiatives and activities that support the growth and sustainable development of The Flinders Ranges Council region's **traditional agricultural industries**.
3. Pro-actively **promotes the region to prospective investors**, using a strategic, informed and targeted approach.
4. Focuses on activities where there are likely to be **positive and measurable outcomes** for the community and long-term strategic economic benefits.

Informed by the findings from the economic research and analysis, the Economic Growth and Investment Strategy provides the framework and directions for the region's economic development, with the focus being on 31 individual actions across four strategic activity areas that can be achieved over the next three years.

Figure 2. Economic Growth and Investment Strategy Themes



Effective planning and strategy implementation requires an understanding of the structure and dynamics of the local economy and its interrelationships with the wider Far North Region as well as the State, national and global economies.

By identifying priorities for growth, the Flinders Ranges Economic Growth and Investment Strategy is designed to help facilitate investment in the region and encourage established businesses to invest further into developing the local economy.

To do this effectively requires an informed and targeted approach. Hence, understanding The Flinders Ranges Council region's economic stocks and flows is essential.

2. Economic Stocks and Flows

ers Ranges National

2. Economic Stocks and Flows

2.1 Overview of The Flinders Ranges Council Region's Economy

The Gross Regional Product (GRP) of The Flinders Ranges Council Region is estimated at \$64.9 million, which is 2% of the wider Far North Region's GRP and approximately 0.06% of South Australia's Gross State Product (GSP). GRP per worker in the region is \$126,171 and GRP per capita is \$39,544. This compares to South Australia's GSP per capita of approximately \$62,100.

Employment in The Flinders Ranges Council region has been concentrated in agriculture, tourism and other service sectors, namely health care and education. Agriculture accounts for 21 per cent of local employment, followed by Tourism (19%), Health Care and Social Assistance (15%) and Education and Training (9%).

A traditional mainstay of the region's economy, agriculture, which is based on sheep, grains and beef cattle production, remains an important contributor to economic activity with potential for continued growth and development. The agricultural sector's historical significance is also a feature of The Flinders Ranges Council region's tourism offer, with a number of old pastoral homesteads dotted around the region's arid landscape providing points of interest for the many visitors who either pass through or stay in the region to explore.

Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail and transport. Importantly, the tourism industry displays strong linkages into the local economy. Retail Trade, which is a key component of the Flinders Ranges' visitor economy, is the other main provider of local employment in The Flinders Ranges Council region, accounting for 7 per cent of jobs in the area.

The significance of agriculture, tourism and services as drivers of The Flinders Ranges Council region's economy and as potential pillars of future economic prosperity, is illustrated in the economic stocks and flows analysis.

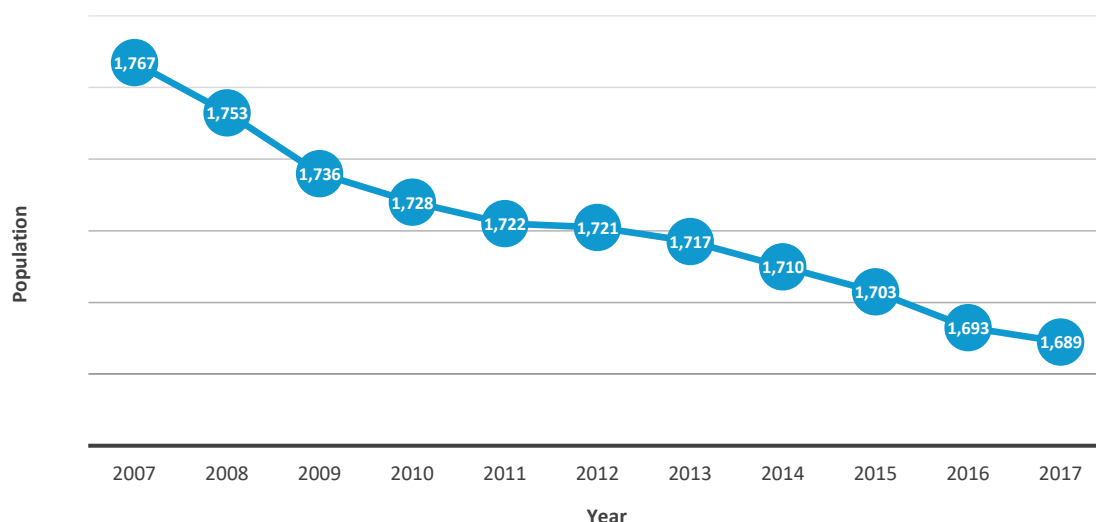
2.2 The Flinders Ranges Council Region's Socio-Economic Structure and Dynamics

Population

The Flinders Ranges Council region has an estimated resident population (ERP) of 1,689. The ERP is the official Australian Bureau of Statistics (ABS) measure of the population of areas in Australia according to a usual residence. The estimates for the region are based on local government area and statistical area level 1 (SA1) data sourced from the ABS.

As illustrated below, the resident population of The Flinders Ranges Council region has declined marginally but steadily since 2007. Between 2007 and 2017, the population of The Flinders Ranges Council region has declined at an average annual rate of 0.45%.

Figure 3. Population Trend, Flinders Ranges, 2007 to 2017

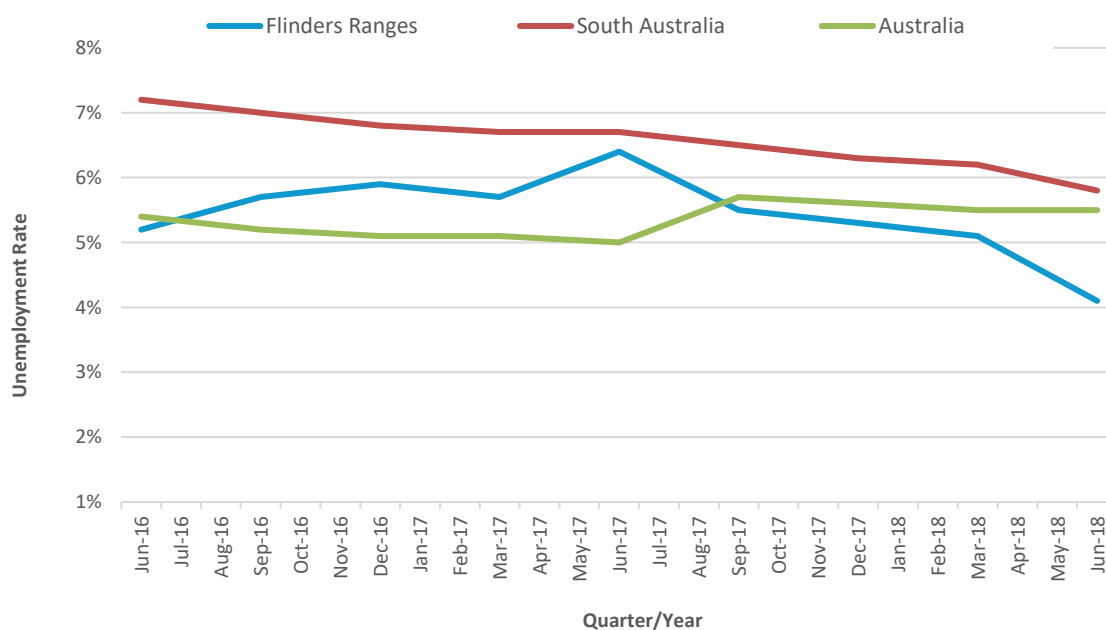


Source: <https://www.economyprofile.com.au/rdafarnorth/trends/population#table>, viewed 7th December 2018

Unemployment Trends

According to data sourced from the Department of Jobs and Small Business, between June 2016 and June 2018, the unemployment rate in the Flinders Ranges Statistical Area Level 2 (SA2) remained fairly steady (with a minor peak in June 2017), declining marginally overall, from 5.2% in June 2017 to 4.1% in June 2018. The unemployment rate in the Flinders Ranges is lower than the State and national averages, with the comparable national unemployment rate at 5.5% and the South Australian rate of unemployment at 5.8% in June 2018.

Figure 4. Unemployment Rates, Flinders Ranges, South Australia and Australia, June 2016 to June 2018



Source: Department of Jobs and Small Business, June 2017 and June 2018

2.3 Economic Stocks and Flows

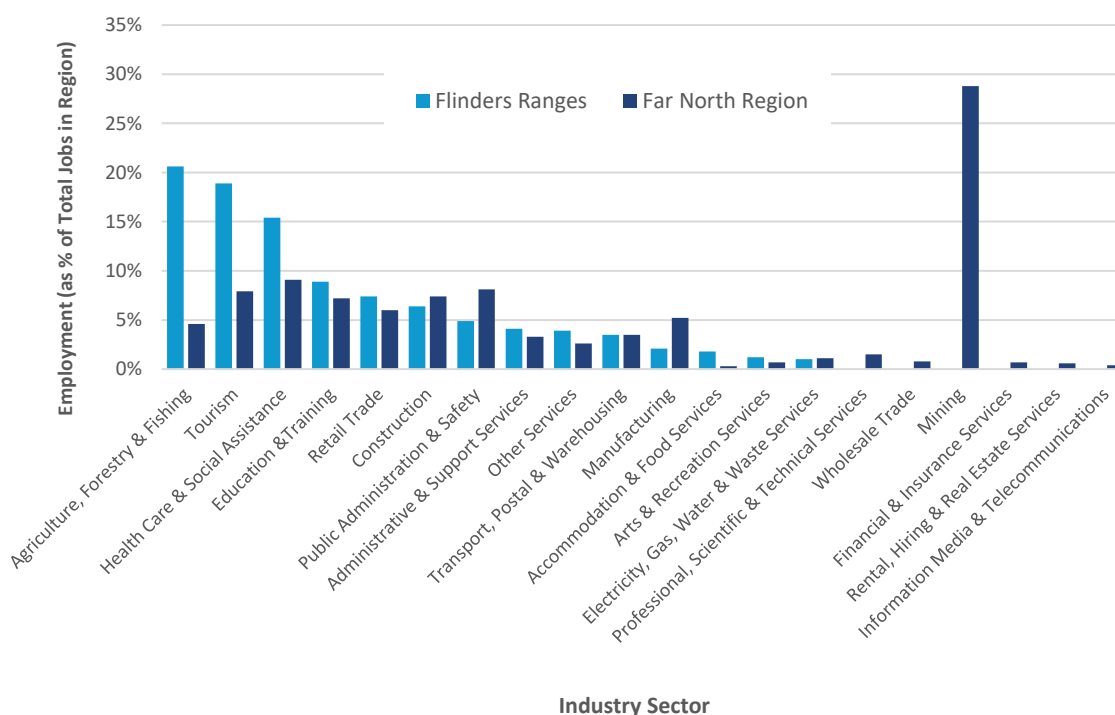
Employment by Industry

Figure 5 illustrates The Flinders Ranges Council region's profile of employment by industry (that is, the number of employees whose place of work is located within the Flinders Ranges).¹ The data is the latest release (June 2018) from REMPLAN, which uses 2016 ABS Census Journey to Work data as a base and adjusts employment numbers to current (2017) estimates using the latest (2014/15) national input-output tables and June 2017 Gross State Product data.

In terms of jobs, the economic base of the region is relatively broad with health, education, agriculture and retail also making large contributions. The level of local employment self-containment is high, with 61% of people who work in the Flinders Ranges Council region living there too, and most of the remaining workers coming from Port Augusta and surrounding areas.

To better capture the true size and value of tourism, REMPLAN quantifies the tourism sector as a stand-alone industry. The tourism industry is an amalgam of activities across various sectors including Retail Trade, Accommodation & Food Services, Arts and Recreational Services and Transport, Postal and Warehousing. REMPLAN's Tourism Analysis Module estimates the total number of jobs and the value of tourism for the local economy and incorporates a 'Tourism Sector' into the output and employment data. Tourism supports 19% of local jobs (compared to 8% of jobs located in the wider Far North Region), making it The Flinders Ranges Council region's second-largest industry of employment behind Agriculture, which accounts for 20% of local employment.

Figure 5. Employment by Industry, Flinders Ranges and Far North Region, 2017



Source: REMPLAN, June 2018

¹ The employment data presented in this report represents the number of people employed by businesses / organisations in each of the industry sectors in the Flinders Ranges. The employment data is place of work data and represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

In The Flinders Ranges Council region, 86% of local tourism employment is in Accommodation & Food Services, then Retail (5%), Administrative & Support Services (3%), Transport (2%) and Arts & Recreation Services (2%). Of all Accommodation & Food Services jobs, 73% are related to accommodation, reflecting a stronger focus on serving visitors, relative to the serving local residents.

Other major contributors to employment in the region include Health Care and Social Assistance (15% of all jobs in the Council region), Education and Training (9%) and Retail Trade (7%). The size of the region's Education and Training sector as a proportion of local employment (9% of all jobs in the local economy), illustrates the significance of this industry when it is considered that across the wider Far North Region, Education and Training accounts for 7% of all jobs.

The same can be said for Health Care and Social Assistance, which, with 15% of all jobs in the region makes it the fourth-largest industry of employment locally. Across the Far North Region as a whole, Health Care and Social Assistance accounts for 9% of all jobs in the region.

The spread of local employment across a number of industry sectors reflects the greater economic diversity of The Flinders Ranges Council region compared to other parts of the Far North. Unlike neighbouring areas such as the Outback Communities Authority Region or Roxby Downs, where mining is the dominant employer and contributor to industry output, in The Flinders Ranges Council region, mining does not contribute to local economic activity with the majority of jobs in the services sectors of the economy.

Industry Output and Value-Added

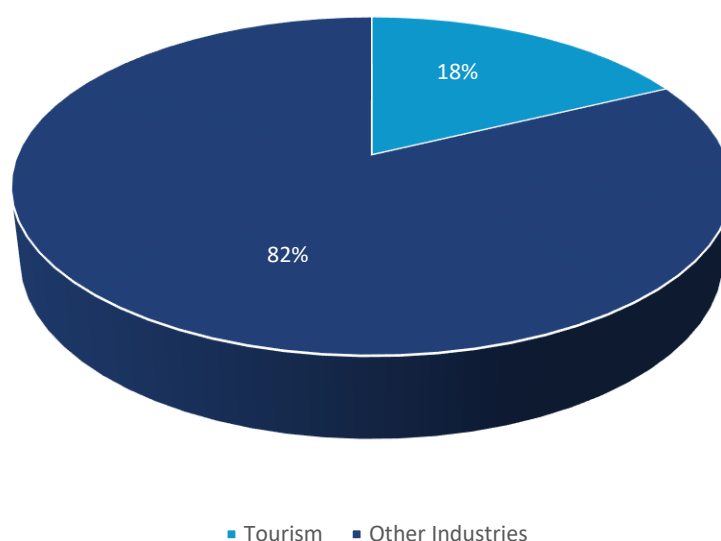
The REMPLAN economic modelling also calculates industry value-added, which is the value that is added by industry sectors in The Flinders Ranges Council region to intermediate inputs. Value-added is considered to be a better reflection of the strength or otherwise of a local or regional economy because it refers to only the value of output generated in the region less the cost of imported inputs such as the purchase of machinery and equipment and other non-labour inputs used in the production process.

The total value-added estimate for The Flinders Ranges Council region is \$118 million, which is 2% of the total for the whole Far North. The largest share of the region's industry value-added is attributable to agriculture, which accounts for 20% of total value-added followed by tourism, which accounts for 17% of the total. Other notable contributors include Ownership of Dwellings (12%), Health Care and Social Assistance (11%), Education and Training (7%) and Administrative & Support Services (7%).

The Flinders Ranges Council region's tourism output is estimated at \$21 million, which is 18% of the value of the region's total output. The REMPLAN modelling estimates that for each dollar spent by a tourist in The Flinders Ranges Council region, \$0.72 is spent on Accommodation & Food services, \$0.14 on Ownership of Dwellings and \$0.05 on Administrative & Support Services.

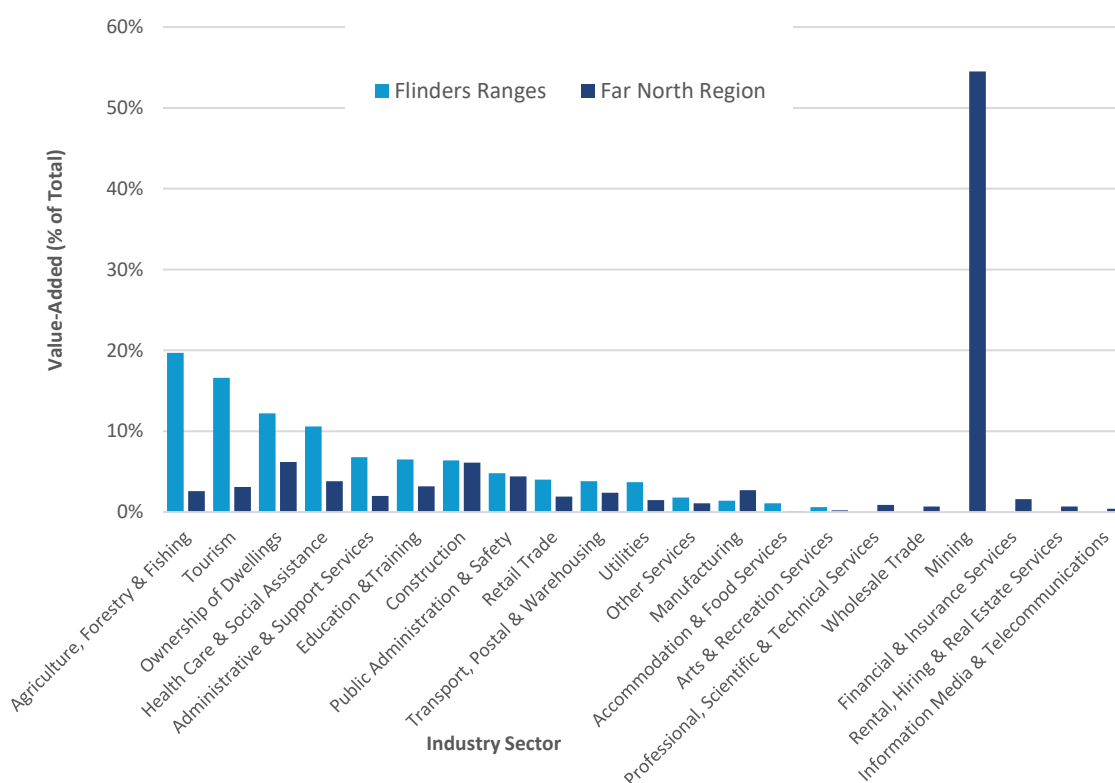
Also of interest is the relative size of the various services sectors as a contributor to industry value-added in The Flinders Ranges Council region compared to the wider Far North. Although small in number, the Flinders Ranges shows a relatively higher representation of industry contribution to value-added in Public Administration & Safety, Administrative & Support Services, Transport, Postal & Warehousing, Arts & Recreation Services and Other Services. This reflects the role of key centres, notably Quorn and Hawker as service centres for the region's residents, businesses and visitors.

Figure 6. Flinders Ranges Tourism Industry Output as a Proportion of Total, 2017



Source: REMPLAN, June 2018

Figure 7. Value-Added by Industry, Flinders Ranges and Far North Region, 2017



Source: REMPLAN, June 2018

Inter-regional Exports

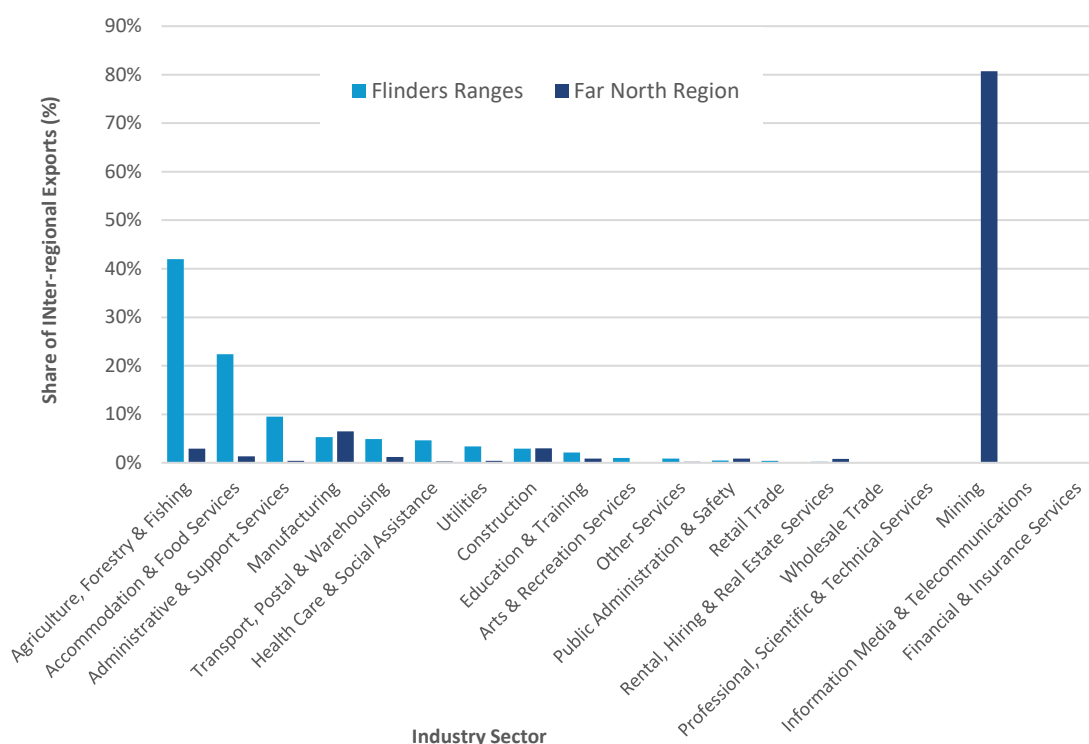
Economic modelling shows the value of goods and services produced by industry sectors in The Flinders Ranges Council region that are sold to consumers, businesses, and governments based outside the region's boundaries.

This includes 'exports' to locations in other parts of South Australia (including the Far North Region), Australia and overseas. The total estimated value of regional exports for the region is \$60.3 million, which is 51% of the region's total economic output.

Accommodation & Food Services, Agriculture and Administrative & Support Services together generate almost three-quarters of the region's exports; these sectors are vital for bringing money into the local economy.

Agriculture is the largest contributor to regional exports (42% of total export value compared to 3% for the wider Far North Region), followed by Accommodation & Food Services (22%), Administrative & Support Services (10%) and Manufacturing (5%). This suggests the local manufacturing sector serves a catchment beyond the immediate boundaries of The Flinders Ranges Council area.

Figure 8. Inter-regional Exports by Industry, Flinders Ranges and Far North Region, 2017



Source: REMPLAN, June 2018

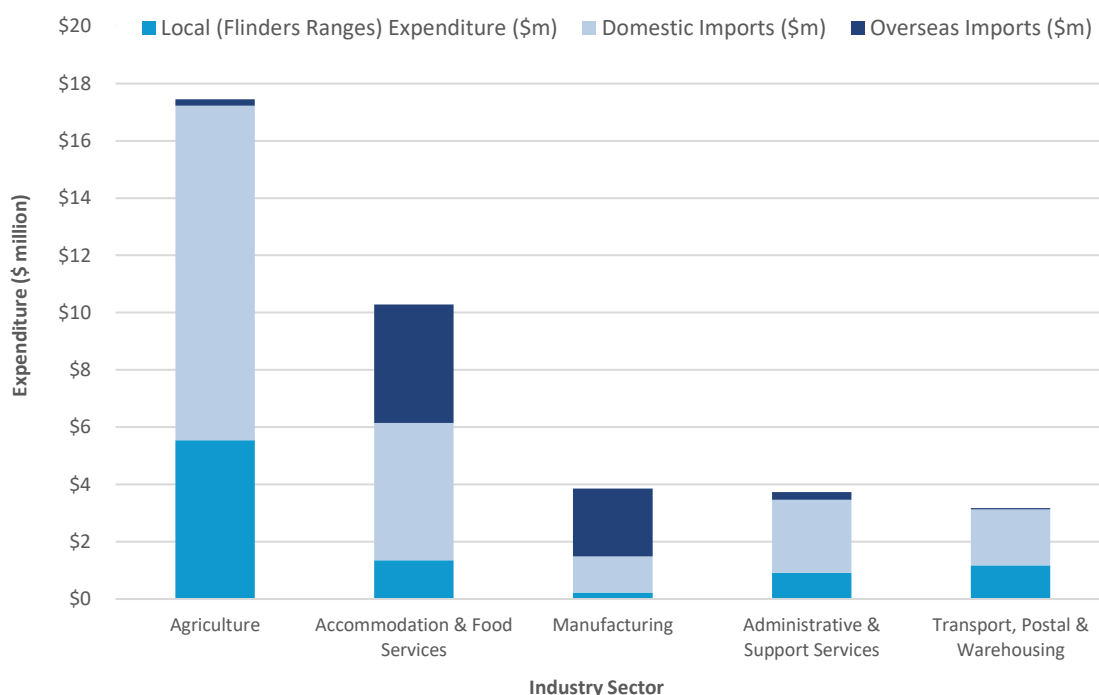
Import Replacement Opportunities

Figure 9 shows the value of expenditure by industries in The Flinders Ranges Council region by geographic location of purchase. In other words, for selected industries, it shows the amount that businesses located in the Flinders Ranges collectively spend on goods and services which are either purchased from within the region, imported from the elsewhere in Australia or imported from overseas, respectively. There are some notable supply chain gaps in the local economy with expenditure on imports (domestic and overseas) representing 73% of the economic output generated in the Flinders Ranges.

Of the \$17.4 million spent by the Flinders Ranges Council region's Agriculture industry on goods and services, 32% is spent locally, 67% elsewhere in Australia and only 1% overseas. Purchases made elsewhere in Australia would cover a range of inputs such as agricultural machinery and equipment, technical services, fertilizers, fuel and feed.

There may be scope for the region's agricultural sector to replace expenditure on imports with locally purchased goods and services. This will depend on which types of imported goods or services can be produced and supplied at a competitive price using local capabilities.

Figure 9. Selected Industry Expenditure Breakdown by Location, Flinders Ranges, 2017



Source: REMPLAN, June 2018 with interpretations by SC Lennon & Associates

Of the \$8.9 million spent by the local Accommodation & Food Services sector, 13% is spent locally in The Flinders Ranges, the remainder being spent elsewhere in Australia (47%) or overseas (40%). This industry's high imports profile is driven in large part by the nature of inputs used in this sector. For example, furniture purchased to equip hotel and motel rooms would be purchased mainly from

outside the region, as would food and beverage products. Other inputs, such as booking services, much of which is now provided online from locations anywhere in the world, would also count as imported inputs to the local Accommodation & Food Services sector.

The Flinders Ranges' 'Driver' Industries

The industry sectors which are the key drivers of the Flinders Ranges Council region's economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) are detailed below.

Agriculture is a traditional mainstay which continues to drive economic growth and development in The Flinders Ranges Council region. The agricultural sector is the largest contributor to industry output, value-added and to inter-regional exports.

The Tourism sector is the other key industry in The Flinders Ranges Council region. It is the second-largest contributor to local employment, output, value added and exports, and it has strong linkages throughout the local economy. Tourism employs local residents across a diversity of sectors including Accommodation & Food Services, Retail Trade and Administrative & Support Services.

Figure 10. Flinders Ranges' 'Driver' Industries

	Backward Linkages	Exports	Employment	Value Added
Agriculture	✓	✓	✓	✓
Tourism	✓	✓	✓	✓
Transport, Postal & Warehousing	✓	✓		
Health Care & Social Assistance			✓	✓
Administrative & Support Services	✓		✓	

Source: REMPLAN, June 2018 with interpretations by SC Lennon & Associates

The spread of local employment across a number of service sectors reflects the greater economic diversity of The Flinders Ranges Council region compared to other parts of the Far North Region. Apart from Tourism, the region's key service sectors are Health Care & Social Assistance, Transport, Postal & Warehousing and Administrative & Support Services

The size of the region's Health Care & Social Assistance sector as a proportion of local employment (15% of all jobs in the local economy) and its contribution to value-added, illustrates the significance of this industry when it is considered that across the wider Far North Region, Health Care & Social Assistance accounts for 9% of all jobs. The region's Health Care and Social Assistance sector is dominated by Health Care Services, and further attention should be paid to this and other service sectors in efforts to continue to diversify and grow The Flinders Ranges Council region's economy.

3. Economic Development Priorities

RAILWAY ST

A low-angle photograph of a white, textured building facade. A prominent sign with the words "RAILWAY ST" in bold, black, sans-serif capital letters is mounted on the wall. Above the sign, there is a small, square window with black horizontal shutters. The building's roofline is visible, featuring a decorative, curved gable. The sky in the background is a mix of blue and white clouds, suggesting a bright day. The bottom of the frame shows the edge of a corrugated metal roof, likely part of a train car or a nearby structure.

3. Economic Development Priorities – Support the Flinders Ranges’ Tourism Sector

3.1 Overview of Tourism in the Flinders Ranges

Tourism is The Flinders Ranges Council region’s principal economic driver, accounting for the largest share of industry output, jobs and exports. The Flinders Ranges name is synonymous with one of Australia’s most iconic natural landscapes which underpins the local tourism industry. Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail trade and transport. Importantly, the tourism industry displays strong linkages into other sectors of the local economy.

The foundation of the Flinders Ranges’ natural comparative advantage in tourism is the scenic appeal of the Flinders Ranges itself, which is the largest mountain range in South Australia. The region includes a number of protected areas including the Ikara-Flinders Ranges National Park, the Mount Remarkable National Park in the southern part of the region, the Arkaroola Protection Area at the northern end of the ranges, The Dutchmans Stern Conservation Park, west of Quorn and the Mount Brown Conservation Park south of Quorn.

The product offering in the Flinders Ranges is diverse. In addition to its distinct natural (often marketed as ‘ancient’) landscapes, there is a richness of European and Aboriginal history and cultural heritage entwined in the regional tourism experience. The diversity of experiences includes walking and cycle trails, colonial history, pioneer ruins, bush foods, Aboriginal cultural tours, museums, biking, off-road driving, a historic railway (Pichi Richi Railway), scenic flights, birdwatching, mine tours, camel tours, camping and caravanning.

For film buffs, The Flinders Ranges Council region is well-known as a location of choice for many high-profile productions which have been filmed in Quorn and the surrounding region over the years. This in itself is an attraction for visitors wishing to visit the places where iconic films like Breaker Morant, Gallipoli, The Shiralee, Robbery Under Arms, The Water Diviner and others were shot.

According to the South Australian Tourism Commission (2015), 93 per cent of visitors to the Flinders Ranges and Outback are domestic visitors; almost half (47 per cent) of domestic visitor nights in the Flinders Ranges and Outback are spent either with friends or relatives or in hotels and similar accommodation. The average length of stay is 4.4 nights. Domestically, caravan and camping is popular with 36 per cent of visitors preferring this type of accommodation. Around one-third of domestic visitors are from interstate, predominantly Victoria and New South Wales, suggesting an opportunity to grow the market for visitors from elsewhere in Australia.

The Flinders Ranges has a very high profile within the industry in Australia; it is widely known and highly regarded as a major destination of choice. The Flinders Ranges is regarded as a ‘must see’ destination for all travellers, whether they are from South Australia, interstate or from overseas. The Flinders Ranges is usually co-promoted with the Outback, leveraging the proximity and interconnectedness (physical and experiential) of these two regions. The Flinders Ranges is currently featured on the South Australian Tourism Commission’s domestic marketing campaign as part of “the best of South Australia”. The Flinders Ranges has also been classified as one of sixteen National Landscapes, recognising its geological significance.

3.2 Tourism's Contribution to The Flinders Ranges Council Region's Economy

As demonstrated in Chapter 2 of this report, tourism is a major contributor to the economy of the Flinders Ranges Council region with strong linkages to other local industry sectors. The total value of the region's tourism output is estimated at \$21 million, which is 18% of the value of the region's total economic output.

Tourism is The Flinders Ranges Council region's second-largest employer behind Agriculture, accounting for 19% of jobs located in the region (and 8% of jobs across the wider Far North Region). In the region, 85% of local tourism employment is in Accommodation and Food Services, then Retail Trade (5%), Administrative & Support Services (3%) and Arts & Recreation Services (2%). Of all Accommodation and Food Services jobs, 73% are related to accommodation, reflecting a stronger focus on serving visitors, relative to local residents. Accommodation and Food Services is also one of the largest contributors to The Flinders Ranges' regional exports (22% of total export value compared to just 1.3% for the wider Far North Region).

3.3 Tourism Industry Performance and Outlook

Australia's tourism industry has exhibited strong revenue growth over the past five years, due primarily to a healthy increase in international visitor arrivals as the Australian dollar has depreciated. Data from Tourism Research Australia shows that China has become Australia's second-largest source of international visitors. As a result, industry revenue is expected to increase at an annualised 3.7% over the five years through 2016-17, to total \$123.7 billion, with 4% growth anticipated in the current year.

According to the South Australian Tourism Commission (SATC), South Australia's visitor economy is at an all-time high, with a value of \$5.9 billion, an increase of 11.4% or \$608 million since June 2015. It states that the latest data released by Tourism Research Australia shows domestic tourism expenditure in South Australia has grown by \$439 million to reach \$5.0 billion, while international expenditure has increased by \$170 million to reach \$944 million since June 2015.

International and domestic visits have also increased. In June 2016, South Australia received 422,000 international visits (up 9.5%) and 6.1 million domestic visits (up 7.7%). Despite rising demand from international visitors, South Australia's tourism industry heavily relies on domestic visitors, with Australian households and businesses accounting for more than 70% of industry revenue.

According to IBISWorld (2016), over the five years through 2021-22, Australia's tourism industry revenue is expected to increase by an annualised 2.6% to total \$141 billion. Over the next five years, the industry in Australia is expected to further enhance its online capabilities as consumers increasingly use the internet to research and organise trips. The Flinders Ranges' tourism industry has a solid base and potential for growth as national and international market trends support opportunities to capitalise on demand for nature based, historical, cultural and recreational experiences; including demand for more high-end, high yield products and services.

3.4 Challenges and Opportunities for Tourism Sector Growth and Development

To help inform this Economic Growth and Investment Strategy, a number of tourism plans and related reports were reviewed dating back to 2000. For the Flinders Ranges (and Outback), perennial issues and recommendations over the years have consistently focused on:

- Access to the region (air, road and rail transport);

- Infrastructure and services that support positive visitor experiences (power, water, and telecommunications);
- Road infrastructure and signage;
- Quality of visitor accommodation;
- Industry capacity;
- Workforce and service quality;
- Product / experience development (including events); and
- Marketing with an emphasis on extending the length of stay of visitors to the region.

While progress has been made to address some of these issues, many require ongoing attention. A number of these points were raised during targeted consultation informing this Strategy. These are expanded upon below.

Drive Tourism Access to and Through the Flinders Ranges

The Flinders Ranges Council region enjoys relatively good access for visitors, particularly for self-drive tourists. As part of the Explorer's Way Touring Route, the region is easily accessed by conventional vehicle from Adelaide and by four-wheel drive via numerous Outback tracks.

On the other hand, many roads in the Flinders Ranges and Outback are unsealed and can become impassable through flooding and heavy rainfall. For example, there are a lack of sealed roads on key tourist routes such as Parachilna Gorge and the two access roads to Arkaroola.

This issue is compounded by the time it can take to re-open these same roads after rain events. Consultation feedback highlighted a desire to see a general upgrade to arterial roads leading to and through the Flinders Ranges, as these roads are generally old and deteriorated.

The Strzelecki Track, which extends from Lyndhurst in the south to Innamincka in the north, is largely unsealed and, if upgraded, would assist in improving the linkages between the Flinders Ranges and the Outback touring routes. The Strzelecki Track upgrade was identified as a priority project in *South Australia's Integrated Transport and Land Use Plan*, released in July 2015. The project will involve the upgrade and sealing of the Strzelecki Track and the Adventure Way road link from Innamincka to the Queensland border.

On 29 September 2015, Infrastructure Australia announced the Strzelecki Track upgrade and sealing project achieved an "early stage" rating on its Infrastructure Priority List. On 17 February 2016, the Australian 15-Year Infrastructure Plan and Infrastructure Priority List was released. The Strzelecki Track sealing and mobile coverage project was identified as a priority initiative.

Fly-in Tourism Access to The Flinders Ranges Council Region

Another key issue is that of air access to the region. Aerodromes in The Flinders Ranges Council region and Outback already support scenic flights (e.g. over Wilpena Pound) and air traffic has grown markedly in recent years in response to successive flooding events of Kati Thanda-Lake Eyre.

Outside of everyday scenic and events-based aviation, there are opportunities to access luxury market traveller segments by offering a higher yield tourism product incorporating air travel through the region's aerodromes. A 2010 report into the growth of the air tourism market in the Flinders Ranges and Outback (RDA Far North) indicated the potential for this market to grow in the region is significant, noting that such tourists are generally high yield, tend to have a greater disposable income and want to fit as much in to a short time as possible. These tourists however, are also high impact, due to the costs of operating and maintaining airstrips.

The report identified a number of barriers to building aviation tourism in the Flinders Ranges and Outback regions, including:

- The need for sustainable improvements to refuelling arrangements in the region (currently Leigh Creek is the only airfield with refuelling facilities);
- High costs for insurance and maintenance of airstrips to CASA approved standards and associated liability concerns of airstrip owners;
- Weight restrictions on the majority of both gravel and sealed runways are limiting the type of aircraft that can land, and subsequently the number of passengers that can be flown into the region; and
- There have been safety incidents in the region, mainly due to stone chip damage on propellers, but also related to the upsurge in air traffic associated with the flooding of Kati Thanda-Lake Eyre.

Currently, Ikara Wilpena Pound Resort, in conjunction with Wrightsair and Alliance Airlines, offer a direct return flight from Adelaide to Wilpena Pound via Roxby Downs.

Although there was a clear desire expressed through consultation to see the expansion and upgrade of Hawker and Quorn aerodromes to allow direct flights of larger aircraft, it is also understood that there are limited Government resources to accommodate this opportunity. It is also considered that the current focus of the Government is on upgrading the Leigh Creek Aerodrome as part of the handover of management of the town and its infrastructure to the Outback Communities Authority.

The potential benefits of aerodrome upgrades should not be underestimated, given the region's good connectivity by road and the opportunity for air, ground tour and accommodation package development.

Assuming demand from the luxury visitor market, building a business case for commercial viability for investment in upgrades to airport facilities at Hawker, Quorn and to other airstrips accessing more remote parts of the broader region requires a focus on developing a tourist product / experience commensurate with the expectations and demands of the luxury market segments.

As more of this type of product is developed in the region, opportunities to work with existing air service operators (e.g. Port Augusta) to influence schedules, introduce new services and co-operatively market these products to potential fly-drive visitors, should not be overlooked.

Critical Infrastructure - Communications, Power and Water Supply

Key infrastructure / service issues affecting tourism development (and economic development broadly) in The Flinders Ranges Council region concern communications, reliability of power and water quality.

Communications Infrastructure

Communications infrastructure is a critical enabler of economic development, not only for business reasons, but also for the safety of visitors moving through the region. Telecommunications shortfalls include poor mobile phone coverage and limited and unreliable internet service outside the main townships. The issue is compounded by a general expectation of visitors to have continuous connectivity, coverage by all providers (only Optus and Telstra service the region) and free Wi-Fi on town stopovers.

While it is generally anticipated that the rollout of the NBN across the Far North Region will go a long way to addressing current service inequalities and will help open up new opportunities for economic growth and investment, there are numerous stakeholders who reportedly hold reservations about the effectiveness of its impact, with uptake reportedly slow in areas where the NBN is already available.

Throughout the broader Far North Region, the NBN only includes Port Augusta, leaving other towns to develop their own Wi-Fi projects. The Flinders Ranges Council has installed Wi-Fi sites within the townships of Quorn and Hawker.

The town of Quorn will receive access to the NBN network via Fixed Line, Fibre to the Node, with construction expected to commence in early 2017 and the town going live in August 2017. People located in the surrounds of Quorn, just outside the coverage area will receive access to the NBN network via Fixed Wireless. This is still early in the planning stages and will require construction of a tower.

At the time of preparing this document the town of Hawker had not yet been allocated a technology by which to connect to the NBN network. It could likely be Sky Muster satellite although Fixed Wireless is being considered with the hope to have an answer on this in 2017. All other residents and business owners throughout The Flinders Ranges Council region can already connect to NBN via Sky Muster satellite.

Sky Muster offer speeds of up to 25Mbps download and 5Mbps upload which is faster than most capital cities (average ADSL speed is 6-8Mbps down and 1Mbps up). There are ten service providers offering a range of plans at different price points. Installation timeframes range from 20 to 35 business days although it can be longer for more remote regions.

Power Supply

Reliable power is another critical infrastructure issue in The Flinders Ranges Council region, particularly in Hawker where regular black outs occur due to transformer problems. The Flinders Ranges Council and SA Power Networks are continuing to work together on a solution to stabilise power supply in the Council region.

Water Supply

Similarly, water quality is an issue in the Council region, and it has been reported that a lack of adequate quality water limits the capacity of the region to develop visitor accommodation. The Flinders Ranges depends on groundwater for supply, resulting in hard / salty water. This issue was resolved for the Hawker community in 2014 through the joint efforts of SA Water and The Flinders Ranges Council to construct a desalination plant. Council is continuing to engage SA Water to work together on a similar solution to improve the water quality in Quorn.

Perceptions of water quality can affect the trip planning and the duration of stay of visitors to an area, and this was reportedly the case with Hawker prior to the installation of the desalination plant. It was reported that complaints from tourists about the poor quality of water in Hawker were common and that this was affecting visitation from the Grey Nomad market in particular.

Tourism Signage

Signage is an ongoing issue affecting the Far North Region and the State of South Australia generally. Signage in the Flinders Ranges is reportedly old and requires upgraded information and replacement. A priority area for signage is between Quorn and Hawker – both directional and interpretive.

A reported barrier to addressing the perennial issue of signage is a lack of knowledge about which agency is responsible. In reality, resolving this issue requires a multi-stakeholder and coordinated approach, involving the South Australian Tourism Commission, the SA Department of Planning, Transport and Infrastructure, National Parks SA, The Flinders Ranges Council, the tourism industry and others.

It was reported that, at a project officer level, relationships between some agencies is very good and that the issue is starting to gain traction, but that a regional plan was ultimately required. It is considered that such a plan should extend to providing guidance to local tourism operators looking to place signage on private property, and that protocols and style guides are required to ensure consistency in look and feel and branding.

Quality of Visitor Accommodation

The range and quality of accommodation across the Far North Region is a well-documented issue and was similarly reported by stakeholders consulted in The Flinders Ranges Council region. Accommodation infrastructure issues were raised concerning the northern and southern parts of the region where it is considered that accommodation upgrades are generally overdue and / or where the diversity of accommodation is limited. The *Draft Flinders Ranges Destination Action Plan 2015-2017* identifies the need for a focus on upgrading 90 rooms from 3-star to 4-star standard and to build 230 new rooms with 25% of 4-star and higher.

Nevertheless, there are many existing successful accommodation-based businesses in the region, including the Prairie Hotel (Parachilna), Wilpena Pound Resort and Rawnsley Park Station, to name a few.

There are opportunities for more visitor accommodation in Quorn and Hawker, for more four to five-star standard accommodation and for cabin park style accommodation.

At the time of writing this report, the Great Northern Lodge accommodation project in Quorn was under construction. This project will see the development of a new motel complex with accommodation for up to 60 guests and conference facilities for up to 80 people in Quorn. As well as serving visitors to the region, this new motel facility will have the capacity to accommodate film crews seeking to film productions on-location in Quorn and the surrounding area. This presents an opportunity to build on the area's history as a location for film-making and to feature this as part of The Flinders Ranges Council region's tourism appeal.

Improving the supply and quality of accommodation infrastructure in The Flinders Ranges Council region is a critical input to development of the tourism industry - in supporting opportunities to develop events of scale as well as aspirations to develop aviation tourism for the luxury market segments.

Tourism Sector Business and Workforce Capacity

A key challenge for the tourism industry in the Flinders Ranges is attracting and retaining skilled workers, an issue that is shared across the Far North Region, and regional and remote Australia generally. This is exacerbated in seasonal destinations such as the Flinders Ranges and in small communities with a limited human resource pool. Key human resources shortages cited during the targeted consultation informing this Strategy includes chefs, managers and tour guides.

Tourism operators face the same challenges as any business does in a regional or remote area in attracting people to the region; including issues with staff housing and support services, such as childcare, social networks and other social infrastructure that contribute to the liveability of a town or settlement. In this regard, tourism is a case in point for the importance of so called 'soft' infrastructure in supporting economic development in regions such as The Flinders Ranges Council area.

Attracting and retaining a skilled workforce is not just an issue of industry capacity, it is inextricably linked to service quality standards and consistency. Continual development of staff skills through ongoing training of tourism

operators and staff in The Flinders Ranges Council region is considered critical to the industry's growth and sustainability. Central to this issue is the importance of customer service training.

For any region to provide a consistent, high quality customer service experience for visitors is challenging. Firstly, it is usual for there to be variations in quality standards, with some parts of the industry performing better than others. However, this can be exacerbated by the essential involvement of non-traditional tourism businesses in the visitor experience, such as supermarkets, chemists and service station operators who may not necessarily see themselves as tourism businesses.

Tourists are travelling more regularly than ever before, having a broader range of comparable experiences, and developing greater service expectations accordingly. Although the development of new and more online tourism services challenges the traditional tourism business models - such as marketing and distribution channels - it also presents an opportunity, if not necessity, for on-the-ground operators to differentiate themselves by ensuring they provide quality, traditional customer service to all visitors to their region.

Ongoing capacity building within the industry is an important input to the development of new and experiential tourism products (see below) – for example, through continuous improvement in the quality of local guides to ensure a consistent and high quality delivery of the stories of The Flinders Ranges Council region and to support a strong, positive brand perception.

Product / Experience Development

The Flinders Ranges already boasts a number of tourism experiences of high appeal to both domestic and international visitors. Continuing to develop the attraction of the Flinders Ranges is essential to growing visitor numbers and increasing their length of stay and expenditure levels.

A recognised opportunity to extend and enrich visitor experiences in The Flinders Ranges Council region is to further develop infrastructure that capitalises on the region's rich natural and human histories, culture and heritage. This includes, for example, the region's geological history, its rich native flora and fauna, Aboriginal history and cultural heritage and the history of European settlement in the region.

Two specific concepts that have been highlighted are a geo-tourism interpretive centre in Hawker and a Pichi Richi Railway interpretive centre in Quorn.

A Geo-Tourism Interpretive Centre in Hawker

A proposal for a geo-tourism interpretive centre in Hawker is currently subject to an application by the Flinders Ranges Tourism Operators Association (FRTOA) to the National Radioactive Waste Management Facility Community Benefit Program to undertake a feasibility study into the development of a geological interpretative centre in Hawker.

While a focus of the centre would be the region's Ediacaran fossils, other elements could include drawing linkages to the National Landscapes Program (in the vein of the 'Mountains of Memory Project') and incorporation of broader Indigenous and European history experiences including the region's Megafauna.

The development of geo-tourism interpretive centre in Hawker should consider opportunities for linkages to broader geo-tourism experiences in the Outback and further afield. For example, the Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan (2008-2014) identifies the opportunity to link geo-tourism in the

Flinders Ranges with fossil and other related discoveries from Andamooka (to be showcased in Roxby Downs) and the Umoona Opal Mine and Museum in Coober Pedy. Other potential geo-tourism linkages exist with mine tours at Olympic Dam and fossicking in Andamooka.

Interstate, it is worth exploring the potential to tap into the Dinosaur Trail in Queensland's Outback and draw some of the associated touring traveller market across the border via the Birdsville and Strzelecki Tracks. This would require assistance from the South Australian Tourism Commission (SATC) and cooperation from Tourism and Events Queensland (TEQ) to identify suitable product packaging opportunities, develop marketing collateral and to co-promote accordingly.

The Pichi Richi Railway Interpretative Centre

The Pichi Richi Railway interpretative centre is still in its early days of concept planning and discussion but is an obvious extension to what is already a very well-known and popular tourist attraction. Peterborough Steamtown, which is a good example of an attraction based on rail history, has been a successful addition to the township of Peterborough and a model for the Pichi Richi to follow.

Potential UNESCO World Heritage Listings

Consultation also raised a potentially important international opportunity for the Flinders Ranges. It was reported that the Australian Government and UNESCO are looking at possible World Heritage listings for specific areas of the region. While such listings would have implications for tourism management, they would represent a significant opportunity to strengthen the Flinders Ranges brand on an international level, noting that any such listing would take a number of years to transpire.

Regional Collaboration and Coordination

Ongoing cooperation and coordination of destination development and marketing activities in the Flinders Ranges is critical. Key agencies in this process include the South Australian Tourism Commission, the South Australian Tourism Industry Council (SATIC), Flinders Ranges Outback SA Tourism (FROSAT), FRTOA, Station Stays SA, The Flinders Ranges Council and RDA Far North.

Regional coordination is strong at an operator level, supporting the potential for a strategically-resourced and focused approach. FRTOA has undertaken some work on the development of a coordinated regional marketing approach, however it requires implementation.

The Flinders Ranges will benefit most if it is promoted as a region, incorporating its connectivity with Outback SA. There is a reported gap amongst tourism operators in having a broader knowledge of what is available for visitors in the wider region and beyond. Visitor Information Centres (VICs) play an important role in this process by promoting and maintaining a wider regional focus on what they promote / cross-promote to visitors – and not only within the Flinders Ranges. The importance of a regional and broader focus is explicitly reflected in the business plan for the Flinders Ranges VIC in Quorn.

Outside of the Quorn and Hawker VICs, there are other VICs critical to co-promoting the Flinders Ranges and Outback as part of a single experience; particularly Roxby Downs, Woomera, Port Augusta, Wilpena, Peterborough and Coober Pedy. Previous tourism plans have highlighted the opportunity to forge closer interactions between VICs and the programs and priorities of FROSAT and RDAFN and to develop closer integration with regional tourism strategies. Other key visitor information points should be considered as part of any coordination activities, including accommodation, shops and fuel stations.

3.5 Actions

Recommended actions, to support the growth and development of The Flinders Ranges Council region's tourism sector, categorised according to key areas of action, are as follows:

Tourism Support Infrastructure

- 1.1 Continue to review, assess and prioritise The Flinders Ranges Council's strategic regional road upgrade needs using standard assessment criteria; agree on priorities and advocate needs to State and Federal Governments.
- 1.2 Continue to collaborate with relevant State and Federal Government departments and agencies to progress the Strzelecki Track upgrade and sealing project proposal.
- 1.3 Prepare a regional wayfinding signage strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region.
- 1.4 Continue to work together to provide a positive climate for private sector investment in new and upgraded accommodation as per the 2020 regional target: upgrade 90 rooms from 3-star to 4-star standard and build 230 new rooms with 25% of 4-star and higher.
- 1.5 Advocate relevant government agencies to build the infrastructure required, such as aerodrome upgrades, to support the potential for regional South Australia as an aviation destination.
- 1.6 Investigate opportunities to reduce operating costs for public and private aerodromes and airstrips in The Flinders Ranges Council region and Outback through a group insurance scheme and / or through Government underwriting.
- 1.7 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
- 1.8 Continue to actively pursue the extension of mobile and satellite phone coverage throughout The Flinders Ranges Council region and the Outback through support for the Blackspots Program and other programs as they become available.
- 1.9 Support The Flinders Ranges Council in its efforts to work with SA Power Networks on a solution to stabilise power supply in the Council region.
- 1.10 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn.

Tourism Sector Business Support

- 1.11 Continue to provide business development support to traditional and non-traditional tourism businesses in The Flinders Ranges Council region.
- 1.12 Develop and promote a customer service strategy / campaign for the Flinders Ranges and Outback, targeting both traditional and non-traditional tourism businesses.

Tourism Product and Experience Development

- 1.13 Continue to support FRTOA in its efforts to fund and conduct a feasibility study into the development of a geological interpretative centre in Hawker.
- 1.14 Work with tourism agencies and operators to explore opportunities to develop and promote geo-tourism linkages between the Flinders Ranges and the Outback. Hold discussions with SATC regarding the potential to develop further linkages with the 'Dinosaur Trail' in the Queensland Outback.
- 1.15 Work with the Pichi Richi Railway Preservation Society on progressing a concept and feasibility study into the development of a Pichi Richi Railway interpretative centre.
- 1.16 Explore opportunities to promote The Flinders Ranges Council region's history of film on location as a tourism drawcard.

Tourism Sector Collaboration and Co-ordination

- 1.17 Continue to encourage an integrated approach between tourism stakeholders to leading and managing the sector and develop ways to build the self-sustainability of the region's tourism management structure.
- 1.18 Work with FRTOA, FROSAT, the SATIC, the SATC and other key agencies to resource and implement a regional coordinated marketing approach to tourism.
- 1.19 Conduct regional tourism expos / tourism exchanges to showcase what is available in the broader region to operators in the Flinders Ranges and the Outback. Consider the feasibility of holding these in the low season to maximise opportunities for participation by operators and involve non-traditional tourism businesses where possible.
- 1.20 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience.

3.6 Performance Measures

- Completed upgrade / sealing of the Strzelecki Track within three years.
- Preparation, within three years, of a feasibility study into the development of a geological interpretative centre in Hawker.
- Preparation, within 18 months, of a concept and feasibility study into the development of a Pichi Richi Railway interpretative centre.
- Preparation, within 18 months, a wayfinding strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region.
- Organise and host, by the end of 2017, a regional tourism expo / tourism exchange showcasing what is available in the broader region to operators in the Flinders Ranges and the Outback.
- Steady increase in the number of tourists taking self-drive journeys through the Flinders Ranges over the next five years.

- A steady increase in the number of fly-in tourists to the Flinders Ranges over the next five years.
- A measurable increase in the uptake of digital technology by tourism businesses in The Flinders Ranges Council region.
- Increased average length of stay for visitors to the Flinders Ranges from 4.4 nights to 6 nights within five years.
- Steady growth in the tourism sector's contribution to The Flinders Ranges Council region's gross regional product (GRP) and employment over the next five years.
- Consistent improvement in customer satisfaction ratings via co-ordinated surveys.

4. Other Economic Development Priorities for The Flinders Ranges Council Region

Although tourism is the Flinders Ranges Council region's principal economic driver, other sectors are important contributors to the regional economy. This section of the report addresses opportunities for growth associated with sectors other than tourism, but in so doing highlights some of the inter-relationships between sectors in the Flinders Ranges and common cross-sectoral challenges, particularly in relation to supporting infrastructure.

4.1 Support Sustainable Agriculture in The Flinders Ranges Council Region

Challenges and Opportunities for Growth

Agriculture is a traditional mainstay of the region's economy, and based mainly on sheep with some cropping and beef cattle production. After tourism, agriculture is the other notable provider of jobs in the region, accounting for 13 per cent of employment. Agriculture accounts for 10% of the total value added of \$52 million and 23% of total export value. It is also the largest contributor to industry output and to inter-regional exports, other than tourism.

There are extensive pastoral leasehold properties in the Northern and Central Flinders Ranges grazing domestic stock but also perpetual leasehold and freehold agricultural properties towards the south. Properties within The Flinders Ranges Council area are generally mixed enterprises - largely pastoral with some cropping and often incorporating small tourism ventures as part of a diversification strategy.

Merino sheep are grown for wool and also cross bred with Suffolk sheep for meat (fat lambs). Cereals for grain are the main crops in the region (wheat and barley) but oats are also grown for feed production. Some fruit and nuts are grown in the better watered country around the ranges, for example, olives and Quandongs.

Some producers in The Flinders Ranges Council region have developed a sole focus on Dorper sheep – a fast-growing meat-producing sheep that originated in South Africa. The breed is associated with the saltbush country in the region and sold through a specialist saltbush lamb broker in Port Augusta.

Other than the Dorper sheep, fat lambs are marketed through local agents and sent to either Murray Bridge or to Victoria, depending on market price. Unlike their pastoral counterparts in the Outback Region, producers in The Flinders Ranges Council region can load stock directly onto B-double trucks for transport to slaughter without the need for cross-loading facilities along the way. If being transported to Victoria, stock can be spelled south of Adelaide. Sheep producers in the region have reported that the market for sheep products has been excellent over the past two to three years, particularly wool.

According to IBISWorld (2015), nationally, following years of losses, Australia's sheep farming industry returned to growth for most of the past five years. Increased rainfall during 2010-11 improved pasture feed, reducing the cost of keeping livestock and allowing farmers to expand production. Industry revenue however, has remained volatile, moving in line with fluctuations in commodity prices, rainfall and production. Industry revenue is forecast to grow nationally at an annualised 1.5% over the five years through 2015-16, to reach \$3.4 billion.

Cropping is generally a relatively marginal part of a given enterprise and used to supplement income and stock feed as seasons and land of appropriate elevation and aspect will support it.

Examples of diversification into tourism on properties include development of self-drive four 4WD tracks, conversion of shearers' quarters into accommodation and establishing bush camping quarters.

Some of the challenges reported for pastoralists in The Flinders Ranges Council region include managing seasonality and dealing with red-tape, such as in relation to water movements on properties and dam building.

Land in the area is tightly held and, according to those consulted, is difficult to buy. This issue is compounded by a growth in lifestyle properties which have seen land price increases.

A challenge for the region is to look at ways to ensure that relevant land use planning policies for the Council area reflect and support a key principle of the South Australian Government's Far North Region Plan (2010) to "retain and strengthen the economic potential of pastoral lands." For example, policies should be aimed at preventing the loss of productive pastoral lands and fragmentation, protecting infrastructure of strategic importance to primary industries and managing interfaces with other land uses and activities. Such policies should particularly be considered in relation to lands adjacent to the towns of Hawker and Quorn.

As for other businesses and residents of the Far North Region, for pastoralists, reliability of communications in the Flinders Ranges is an ongoing issue and wireless broadband is very expensive.

Actions

Recommended actions to support sustainable agriculture in The Flinders Ranges Council region are as follows:

- 2.1 Ensure that relevant land use planning policies for The Flinders Ranges Council region reflect and support a key principle of the South Australian Government's Far North Region Plan (2010) to "retain and strengthen the economic potential of pastoral lands".
- 2.2 Continue to provide business advisory services to pastoralists looking to diversify into tourism and other businesses.
- 2.3 Continue to support the rollout of the National Broadband Network (NBN) in the region; promote the rollout to the region's residents and businesses and include in The Flinders Ranges Council region's investment prospectus material as a key competitive advantage.
- 2.4 Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Outback through support for the Blackspots Program and other programs as they become available.

Performance Measures

- Steady growth in the agricultural sector's contribution to the region's gross regional product (GRP) over the next three years.
- A greater diversity of agricultural enterprises operating in The Flinders Ranges Council region over the next three years.

4.2 Monitor Investigations into the National Radioactive Waste Management Facility

Challenges and Opportunities for Growth

The National Radioactive Waste Management Project has been established to implement Australia's radioactive waste management policy. A nominated site for the project has been shortlisted and sits across the Outback Communities Authority and The Flinders Ranges Council region at Barndioota. At the time of writing this report, investigation of this site is in Phase 2 of community consultation and detailed site characterisation studies, with the first step being an Indigenous heritage assessment.

During this phase, AusIndustry, a division of the Department of Industry, Innovation and Science, has established the National Radioactive Waste Management Facility Community Benefit Programme to provide grants for applicants undertaking projects in communities in and around Barndioota. The fund is valued at \$2 million. A Regional Consultative Committee has also been established.

The Australian Government has stated that, no final decision to site the facility has been taken and that a final site will only be selected if there is broad community support and if it meets Australia's strict environmental and radiation protection regulatory requirements.

It has also stated that, at the end of Phase 3, agreement with the community on hosting the facility is essential and that the Government will not impose the facility on an unwilling community, noting no individual or group has a right of veto.

Final site selection will be subject to approval under the *Environment Protection and Biodiversity Conservation (EPBC) Act 1999* and the *Australian Radiation Protection and Nuclear Safety (ARPANS) Act 1998*. It is currently anticipated that the community decision point to proceed or not will occur either late this year (2016) or early next year (2017).

The economic benefits, or otherwise, of the project are not possible to gauge at this time, particularly not before final engineering and other technical designs and costings are completed. If the project proceeds, construction would most likely take place from 2018 to 2020 and it is broadly estimated that construction costs would be in the order of \$100 million.

The potential economic benefits of the construction phase would depend on the extent to which labour and materials could be sourced from within the region. Longer term, it is estimated that the site could generate approximately 15 operational jobs. Some of these would be specialist technical roles while others could potentially be filled locally. Other potential economic benefits could stem from local business's ability to provide goods and services to the operational facility.

Aside from speculation about the potential direct and flow-on (multiplier) economic benefits from the construction and operation of the National Radioactive Waste Management Facility in the region, consideration also needs to be given to potential impacts on the region's existing industries.

In particular, consideration needs to be made for the compatibility (or otherwise) between such a facility and the region's tourism industry, which is built on the Flinders Ranges' iconic scenery and unique landscape character and, potentially, World Heritage listings.

This does not refer to the potential visual impact that such a facility could have on the region's landscape, as such detail is not currently known. Rather it pertains to the perceptions that the presence of such a facility could create

in the minds of visitors and potential visitors to the region and the extent to which such perceptions could damage the region's strong brand reputation.

The potential for such an impact and its flow-on effects to the tourism industry, non-tourism businesses and communities in the region needs to form an explicit part of the terms of reference for any economic and social impact studies that may be carried out in the future under the EPBC Act.

Actions

- 3.1 Continue to work with relevant government agencies and other stakeholders in progressing current and subsequent phases of the National Radioactive Waste Management Facility project investigations.

Performance Measures

- Progress milestones as per the National Radioactive Waste Management Facility project investigations.

4.3 Promote The Flinders Ranges Council Region as a Location of Choice for Investment, Working, Learning and Outback Living

Challenges and Opportunities for Growth

The aesthetic appeal of the Flinders Ranges and the region's heritage towns and settlements such as Hawker and Quorn attract residents looking for a quality outback lifestyle within commuting distance to the major service centre of Port Augusta.

Housing is relatively affordable and the area has good education, recreation and health services. Continuing to develop and improve the region's infrastructure can support economic development by helping to enhance the appeal of the area to skilled workers and entrepreneurs as a lifestyle choice.

The Flinders Ranges Council has a key role to play through strategic land use planning, protection of architectural character and heritage, facilitating the provision of government services, including health and aged care, and delivery of core services and essential infrastructure (such as waste management), among other functions.

Development of the rural fringes around Quorn has been underway for a number of years, and The Flinders Ranges Council has approved about six developments per year outside of the town. A lifestyle village has also been proposed to meet demand for retirement from within the broader region such as those people retiring off pastoral holdings and wanting to remain in the area. It was reported during consultation that a developer had indicated potential viability of a lifestyle village in Quorn. The Flinders Ranges Council Strategic Management Plan has set a nominal target of 2018 for such a development to be commenced.

As discussed earlier in this report, there are a number of key infrastructure issues that impact upon the region's visitor economy prospects, namely telecommunications, reliability of power and water quality. Addressing these issues will also be important to improving the lifestyles of existing and prospective residents and reinforcing The Flinders Ranges Council region's attractiveness as a place to invest.

To attract and retain investment in the region, availability of suitable workforce skills is paramount. A key focus of the Training and Skills Commission Five-Year Workforce Development Plan (2014) is on how qualifications can support occupational outcomes, including pathways to further training and employment. Ultimately, the aim must be to align qualifications with industry needs.

Employment in The Flinders Ranges Council region is concentrated in tourism and other service sectors, namely health care and education. Tourism accounts for 19 per cent of local employment, followed by Health Care and Social Assistance (17%) and Education and Training (14%). The strength of the education and training sector in the region presents an opportunity for improved alignment between this sector and the region's economic growth and investment opportunities.

Targeted consultation undertaken to inform this strategy identified a perceived gap in understanding between the Department for Education and Child Development (DECD), the area schools and local businesses with respect to supporting training and development aligned to the needs of industry. In particular, it is considered that greater support could be given to promoting an understanding of the role of tourism in the Flinders Ranges and wider Far North Region and of viable and worthwhile career pathways that are available. For example, there may be an opportunity to develop locally based workplace traineeships aligned with the requirements of a certificate in tourism management.

The ongoing development of the skills of business operators throughout The Flinders Ranges Council region is considered critical, with some specific identified needs including: customer service training; business planning and succession planning; general business management; and bookkeeping.

Funding for the ongoing training of business operators is at present relatively limited compared with other target groups for government funding, such as the unemployed. Therefore, increased funds and capacity to run regular workshops throughout The Flinders Ranges Council region would be ideal.

Actions

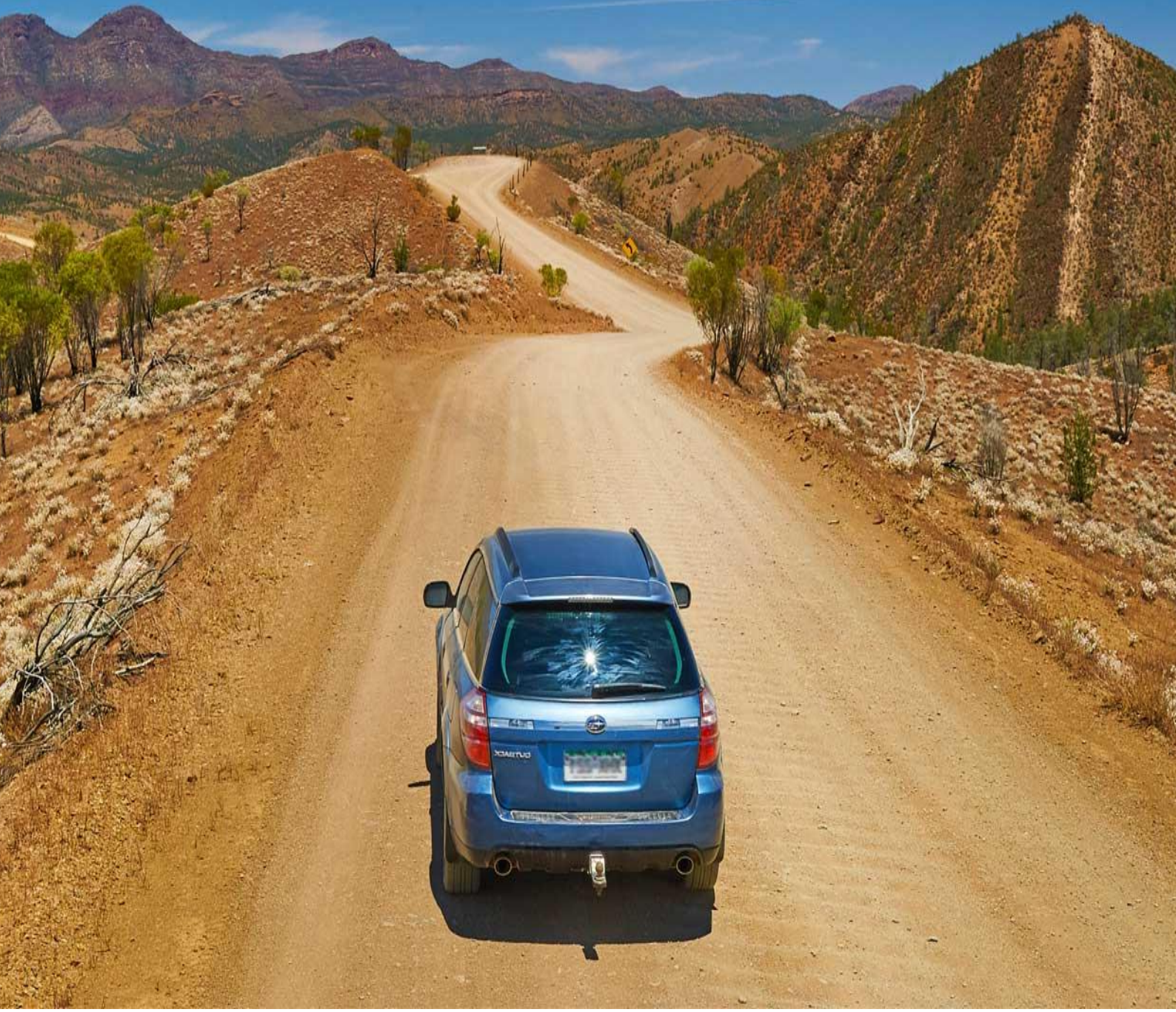
Recommended actions to promote The Flinders Ranges Council region as a location of choice for investment, working, learning and outback living are as follows:

- 4.1 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
- 4.2 Continue to actively pursue the extension of mobile and satellite phone coverage throughout The Flinders Ranges Council region through support for the Blackspots Program and other programs as they become available.
- 4.3 Support The Flinders Ranges Council in its efforts to work with SA Power Networks on a solution to stabilise power supply in the Flinders Ranges.
- 4.4 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn or alternative solutions for treated water.
- 4.5 Facilitate discussions between area schools in The Flinders Ranges Council region and local business operators on opportunities to strengthen the alignment between vocational education and training and the region's economic growth and investment opportunities, particularly tourism.
- 4.6 Continue to support the capacity development of regional business operators through access to business advisory services. Explore opportunities to resource a regular program of business development workshops throughout The Flinders Ranges Council region and Far North Region.

Performance Measures

- Full rollout of the NBN to The Flinders Ranges Council region over the next three years.
- Improved mobile phone and satellite coverage in The Flinders Ranges Council region.
- Improved and more reliable power supply in The Flinders Ranges Council region.
- Construction of a desalination plant to service the town of Quorn within three to five years.
- Improved access to and take-up of local business advisory services available through State and Federal Government agencies and initiatives.
- A program of regular business development workshops established in the region within 18 months.
- Resolution of accredited, locally-provided tourism training needs to serve the region's tourism industry within two years.

4. Economic Growth and Investment Strategy Work Plan



5. Economic Growth and Investment Strategy Work Plan

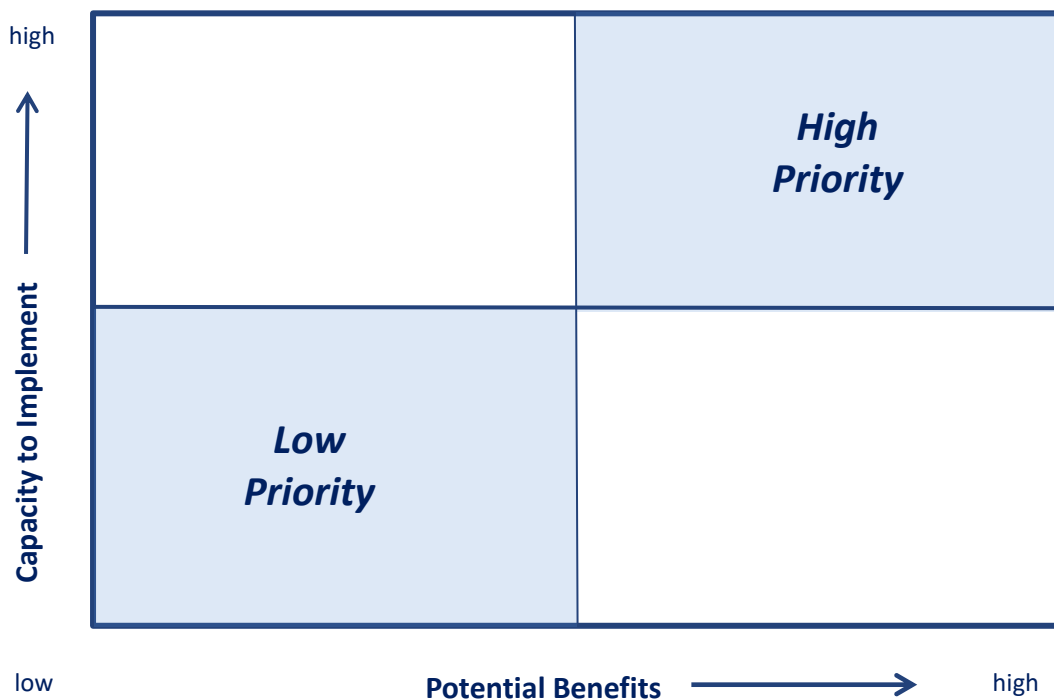
5.1 Assessing and Prioritising Actions

The challenges and opportunities presented in this Economic Growth and Investment Strategy have been determined as a result of the findings from comprehensive research and data analysis coupled with targeted consultation with selected stakeholders.

While all of the recommended actions are considered valid and worthwhile, it is acknowledged that resource constraints will make it impossible for RDAFN, The Flinders Ranges Council and their partners to act on all issues and opportunities immediately. This makes it necessary to prioritise activities for short-term implementation.

The prioritisation of actions is guided by two broad sets of assessment criteria – benefit assessment and capacity to implement, as outlined below.

Figure 11. Opportunity Assessment Matrix



Source: SC Lennon & Associates

Using these criteria, it can be determined to what extent the project or activity in question concerned is a high priority. It is acknowledged that other criteria can also be applied with the use of local knowledge and consideration of other related objectives.

Potential Economic Development Benefits

1. Does the opportunity build on The Flinders Ranges Council regions existing business and employment profile, capabilities and comparative advantages?
2. Does the opportunity demonstrate the potential to support endogenous growth factors (e.g. increase the number of viable businesses, jobs and expenditure within the region)?
3. Is the opportunity likely to help create more jobs in The Flinders Ranges Council region' 'focal industries'?
4. Is there a ready market for the opportunity's product or service?

Capacity to Implement (and Organisational Fit/Role)

1. Do we have the capacity (funds, people, skills, technology and the programs in place) to facilitate and/or drive the opportunity?
2. Is the infrastructure available to enable the business opportunity to develop (or can the infrastructure in question be realistically built / accessed)?
3. Does the opportunity / business proposal have the political will and the support of local communities?

Organisational Fit / Role

1. Does the opportunity align with the charter / mission of The Flinders Ranges Council and RDAFN?
2. Does the opportunity align with broader government policies and funding priorities?
3. What role should The Flinders Ranges Council and RDAFN take in progressing the opportunity (management, lobbying / advocacy, awareness raising, partnering, funding, training, etc.)?
4. Which agency or organisation (other than RDAFN or Council) should have lead responsibility for this opportunity?
5. Who else should be involved?

Other Considerations

Environmental Benefits

Creates environmental benefits through:

1. Reducing greenhouse gas emissions through adoption of renewable energy sources and through energy conservation.
2. Conservation and enhancement of native flora and fauna.
3. Conservation of cultural heritage.
4. Conservation of water resources.
5. Conservation of land resources.
6. Enhancing urban and rural liveability.

Social Benefits

Creates social benefits through:

1. Creating a more inclusive and cohesive community.
2. Addressing housing affordability.
3. Improving education and training outcomes (links to economic benefits).
4. Higher quality recreational and cultural facilities.
5. Enhances comfort and lifestyle.
6. Improves quality of social support services.

Applying the assessment criteria and effectively 'rating' and 'ranking' each action determines those which are considered the highest priority and which, as a result, are short-term actions to be progressed over the next one to three years. The assessment outcomes are shown in the table below.

Figure 12. Summary of Action Assessment Outcomes

Action	Benefit Assessment	Capacity to Implement	Overall Assessment
<i>Support the Flinders Ranges' Tourism Sector</i>			
1.1 Continue to review, assess and prioritise the Flinders Ranges' strategic regional road upgrade needs using standard assessment criteria; agree on priorities and advocate needs to State and Federal Governments	High	High	High
1.2 Continue to collaborate with relevant State and Federal Government departments and agencies to progress the Strzelecki Track upgrade and sealing project proposal	High	High	High
1.3 Prepare a regional wayfinding signage strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region	High	High	High
1.4 Continue to work together to provide a positive climate for private sector investment in new and upgraded accommodation as per the 2020 regional target: upgrade 90 rooms from 3-star to 4-star standard and build 230 new rooms with 25% of 4-star and higher	Medium	High	Medium/High
1.5 Advocate relevant government agencies to build the infrastructure required, such as aerodrome upgrades, to support the potential for regional South Australia as an aviation destination	High	Medium	Medium/High
1.6 Investigate opportunities to reduce operating costs for public and private aerodromes and airstrips in the Flinders Ranges and Outback through a group insurance scheme and / or through Government underwriting	High	Medium	Medium/High
1.7 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage	High	High	High
1.8 Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Flinders Ranges and the Outback through support for the Blackspots Program and other programs as they become available	High	High	High
1.9 Support The Flinders Ranges Council in its efforts to work with SA Power Networks on a solution to stabilise power supply in the Flinders Ranges	High	Medium	Medium
1.10 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn	High	Medium	Medium/High
1.11 Continue to provide business development support to traditional and non-traditional tourism businesses in The Flinders Ranges Council Region	High	High	High
1.12 Develop and promote a customer service strategy / campaign for the Flinders Ranges and Outback, targeting both traditional and non-traditional tourism businesses	High	Medium	Medium
1.13 Continue to support FRTOA in its efforts to fund and conduct a feasibility study into the development of a geological interpretative centre in Hawker	Medium	Medium	Medium

Action	Benefit Assessment	Capacity to Implement	Overall Assessment
1.14 Work with tourism agencies and operators to explore opportunities to develop and promote geo-tourism linkages between the Flinders Ranges and the Outback. Hold discussions with SATC regarding the potential to develop further linkages with the 'Dinosaur Trail' in the Queensland Outback	High	Medium	Medium
1.15 Work with the Pichi Richi Railway Preservation Society on progressing a concept and feasibility study into the development of a Pichi Richi Railway interpretative centre	Medium	Medium	Medium
1.16 Explore opportunities to promote The Flinders Ranges Council region's history of film on location as a tourism drawcard	Medium	High	Medium
1.17 Continue to encourage an integrated approach between tourism stakeholders to leading and managing the sector and develop ways to build the self-sustainability of the region's tourism management structure	High	Medium	Medium
1.18 Work with FRTOA, FROSAT, the SATIC, the SATC and other key agencies to resource and implement a regional coordinated marketing approach to tourism	High	Medium	Medium
1.19 Conduct regional tourism expos / tourism exchanges to showcase what is available in the broader region to operators in the Flinders Ranges and the Outback	Medium	Medium	Medium
1.20 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience	High	Medium	Medium
Support Growth and Development of Agriculture in The Flinders Ranges Council Region			
2.1 Ensure that relevant land use planning policies for The Flinders Ranges Council region reflect and support a key principle of the South Australian Government's Far North Region Plan (2010) to "retain and strengthen the economic potential of pastoral lands"	High	Medium	Medium/High
2.2 Continue to provide business advisory services to pastoralists looking to diversify into tourism and other businesses	High	High	High
2.3 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the Flinders Ranges Councils investment prospectus material as a key competitive advantage	High	High	High
2.4 Continue to actively pursue the extension of mobile and satellite phone coverage throughout the Outback through support for the Blackspots Program and other programs as they become available	High	High	High
Monitor Investigations into the National Radioactive Waste Management Facility			
3.1 Continue to work with relevant government agencies and other stakeholders in progressing current and subsequent phases of the National Radioactive Waste Management Facility project investigations	High	Medium	Medium/High

Action	Benefit Assessment	Capacity to Implement	Overall Assessment
Promote The Flinders Ranges Council Region as a Location of Choice for Investment, Working, Learning and Outback Living			
4.1 Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage	High	High	High
4.2 Continue to actively pursue the extension of mobile and satellite phone coverage throughout The Flinders Ranges Council region through support for the Blackspots Program and other programs as they become available	High	High	High
4.3 Support The Flinders Ranges Council in its efforts to work with the Electricity Trust of South Australia on a solution to stabilise power supply in the Flinders Ranges	High	Medium	Medium
4.4 Support The Flinders Ranges Council in its efforts to work with SA Water to construct a desalination plant to service the town of Quorn or alternative solutions for treated water	High	Medium	Medium/High
4.5 Facilitate discussions between area schools in The Flinders Ranges Council region and local business operators on opportunities to strengthen the alignment between vocational education and training and the region's economic growth and investment opportunities, particularly tourism	High	Medium	Medium/High
4.6 Continue to support the capacity development of regional business operators through access to business advisory services. Explore opportunities to resource a regular program of business development workshops throughout the Flinders Ranges and Far North Region	High	Medium	Medium/High

Source: SC Lennon & Associates

5.2 Priorities for Action – Informing a Year 1 Work Plan

As noted above, resource constraints will make it impossible for RDAFN, The Flinders Ranges Council and their partners to act on all issues and opportunities immediately.

Priority projects and activities for implementation as part of a Year 1 work plan are identified based on the application of the above broad set of assessment criteria. They reflect priorities that RDA Far North and The Flinders Ranges Council should advance (in association with identified partners where relevant) as short-term priorities.

The Year 1 priorities are:

1. Continue to review, assess and prioritise The Flinders Ranges Councils' strategic regional road upgrade needs using standard assessment criteria; agree on priorities and advocate needs to State and Federal Governments.
2. Continue to collaborate with relevant State and Federal Government departments and agencies to progress the Strzelecki Track upgrade and sealing project proposal.

3. Prepare a regional wayfinding signage strategy for the Flinders Ranges and Outback with an emphasis on consistent, branded signage throughout the region and the wider Far North Region.
4. Continue to support the rollout of the National Broadband Network (NBN) in The Flinders Ranges Council region; promote the rollout to the region's residents and businesses and include in the region's investment prospectus material as a key competitive advantage.
5. Continue to actively pursue the extension of mobile and satellite phone coverage throughout The Flinders Ranges Council region and the Outback through support for the Blackspots Program and other programs as they become available.
6. Continue to provide business development support to traditional and non-traditional tourism businesses in The Flinders Ranges Council region.
7. Continue to provide business advisory services to pastoralists looking to diversify into tourism and other businesses.

In progressing these actions, cultivating collaborative partnerships for effective implementation will be key.

5.3 Continuing Collaborative Partnerships for Effective Implementation

Collaborating to cultivate regional economic development partnerships is key to successful strategy implementation. Civic leadership and partnerships, what is otherwise known as 'collaborative governance' is a theme underlying all matters concerning the sustainable economic development of The Flinders Ranges Council region.

A fundamental enabler of regional growth, it is characterised by collaborative and cooperative approaches to research, community engagement, knowledge-sharing, planning, project design and implementation of strategies for the good of the region and its communities.

While RDA Far North and The Flinders Ranges Council will take the lead in addressing priority actions as articulated in this document, collaboration will be fundamental to the successful implementation of this Economic Growth and Investment Strategy. Promoting economic growth and investment in the region therefore, requires both leadership and the formation of partnerships.

And it requires a holistic approach, one that embraces the notion of 'economic development' as the mutually-reinforcing and complementary relationship between improvements in economic activity, community wellbeing, cultural diversity, a sense of 'place' and the environment.

In progressing the Strategy, RDA Far North will pro-actively engage with other key agents of change. Some existing working relationships will need to continue to be progressed in light of this Strategy, as a priority. The work of South Australian Arid Lands Natural Resource Management (SAAL NRM), in terms of its funding, participatory projects and consultation, incorporates a broad range of stakeholders that cross-over with those of RDA Far North.

These activities include working with government, pastoralists, mining and petroleum companies, tourism groups, progress associations, non-government organisations and other community groups. The SAAL NRM Board also holds important regional relationships with Aboriginal communities through partnership projects on Aboriginal managed lands and with National Parks South Australia.

The strong linkages between the environment and The Flinders Ranges Council region's culture, history, economy and society, coupled with the cross-over of objectives between RDA Far North, Council and SAAL NRM, highlights the importance of these three organisations working together at a planning and implementation level. While relationships between each function well at a project officer level, there is scope for more proactive, strategic level integrated planning and implementation of partnership projects between these three organisations.

Using this Economic Growth and Investment Strategy as a plan of action, RDA Far North and The Flinders Ranges Council will take the lead, working together with other stakeholders to address opportunities for improved integrated planning and management concerning matters arising from the interface of natural resources management, economic development and community wellbeing.

The Economic Growth and Investment Strategy guides the efforts of RDA Far North and The Flinders Ranges Council, working together and with others, to facilitate opportunities for investment to support the region's long-term growth.

Importantly, using the evidence base from the economic stocks and flows analysis and intelligence gathered through targeted consultation and engagement, it informs a plan of action to support the region's engagement with both State and Federal Governments on matters of significance.

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