

Coober Pedy Economic Growth & Investment Strategy

Prepared on behalf of Regional Development Australia
Far North and the District Council of Coober Pedy

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District Council of Coober Pedy



This report has been prepared on behalf of Regional Development Australia Far North and the District Council of Coober Pedy



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Acknowledgement of Country

We acknowledge the Traditional Owners of the land within the District Council of Coober Pedy local government area, the Antakirinja Matuntjara Yankunytjatjara people. We pay respect to Elders past, present and emerging and value the traditions, cultures and aspirations of the First Australians of this land.

Disclaimer

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Executive Summary



Executive Summary

Informed and Strategic Planning for Economic Development

Regional Development Australia Far North (RDA Far North) in consultation with the District Council of Coober Pedy (DCCP) commissioned the preparation of this Coober Pedy Economic Growth and Investment Strategy (EGIS) to help address key challenges and capitalise on opportunities for Coober Pedy's economic development. 'Coober Pedy', for the purpose of this Strategy, refers the District Council area of Coober Pedy. This EGIS addresses Coober Pedy's economic development challenges and prospects with a focus on providing opportunities for investment to support long-term growth.

The Coober Pedy Economic Growth and Investment Strategy is informed by an evidence base to support Coober Pedy's (and the wider Far North Region's) engagement with both State and Federal Governments on matters of both local and regional significance, which require further attention. It includes a comprehensive and up-to-date analysis of Coober Pedy's economic stocks and flows - both in and out of the local area - identifying its connections and interrelationships with the broader South Australian, national and global economies.

The Coober Pedy EGIS has been prepared on the understanding 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 RDA Far North and the District Council of Coober Pedy, it informs a strategic and targeted approach to project selection to maximise the economic benefits of funding packages or other resources directed to the District Council of Coober Pedy area and the wider Far North Region.

Addressing the Challenges and Building Opportunities for Growth

Coober Pedy and the wider Outback Region of South Australia (the Outback) has undergone a period of unprecedented change and adjustment in recent years 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 Far North Region to a downturn in mining, with the majority of industry activity directly or indirectly dependent on the prosperity of the resources sector. Compounding the region's reliance on mining is the fact that a large share of the wealth generated by the resources sector is captured elsewhere due to industry expenditure and dividends flowing to areas outside the Far North.

The challenges associated with the wider region's heavy reliance on one industry and the fact that a large proportion of the wealth generated by that industry is captured outside the Far North are exacerbated by Coober Pedy's (and the region's) remoteness. According to the Australian Bureau of Statistics' 2017 Estimated Resident Population, Coober Pedy has a population of just 1,837. However, the itinerant and 'part-time' nature of a large number of people who call Coober Pedy home, at least for part of the year, means that at times the local population can be as high as around 3,500 according to District Council of Coober Pedy estimates.

Together, isolation and a heavy reliance on economic activity grown out of opportunities associated with Cooper Pedy's opal mining industry - notably tourism - creates challenges, including: vulnerability to sudden economic shocks caused by downturns, particularly in 'one-industry towns'; susceptibility to demographic changes, notably population peaks in winter and troughs in summer; dis-economies of scale hampering the delivery of physical infrastructure such as information and communications technology as well as community services like health care and education; and distance from markets, leading to relatively higher costs of goods and services and limited market reach for many local businesses.

Key Industries and Opportunities for Growth

Regardless of the challenges, Cooper Pedy is presented with strong prospects for economic growth and development based on existing comparative and competitive advantages and opportunities to diversify local economic activity.

Mining accounts for the largest share of Cooper Pedy's industry output, value-added and exports. Despite recent challenges faced by the mining industry, the outlook is positive. Mining is an anchor of Cooper Pedy's economy and the sector will continue to be a significant economic contributor into the future. The mining industry's linkages through other sectors in the local economy however, are not strong when compared to other industries. This suggests more could be done to facilitate import replacement in the local resources sector.

Tourism is another driver of local economic activity. Cooper Pedy's tourism industry employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail trade (which is one of the largest employers in Cooper Pedy) and administrative and support services including travel agency and cleaning services.

The strength of Cooper Pedy's visitor economy is underpinned by its profile as Australia's 'opal capital' and associated underground and outback experiences. There is potential for growth and diversification of Cooper Pedy's tourism offer, as domestic and international market trends support opportunities to capitalise on demand for outback experiences including natural and historical attractions.

The health care and social assistance sector employs more people than any other industry in Cooper Pedy accounting for almost 20% of all jobs. Other key service sectors which employ a large share of the local workforce include the education sector and the public service. As well as being drivers of economic activity in their own right, Cooper Pedy's health and education sectors are important enablers of economic development as they are essential for facilitating community wellbeing and the productive capacity of the workforce.

In order to address the challenges and to capitalise on new opportunities for growth, the Cooper Pedy Economic Growth and Investment Strategy puts in place an informed and strategic plan of action. The Strategy identifies activities and projects which will have immediate, medium and long-term economic benefits for Cooper Pedy's businesses and its residents, and it highlights planning and project priorities to facilitate change towards a robust and sustainable economic future for Cooper Pedy.

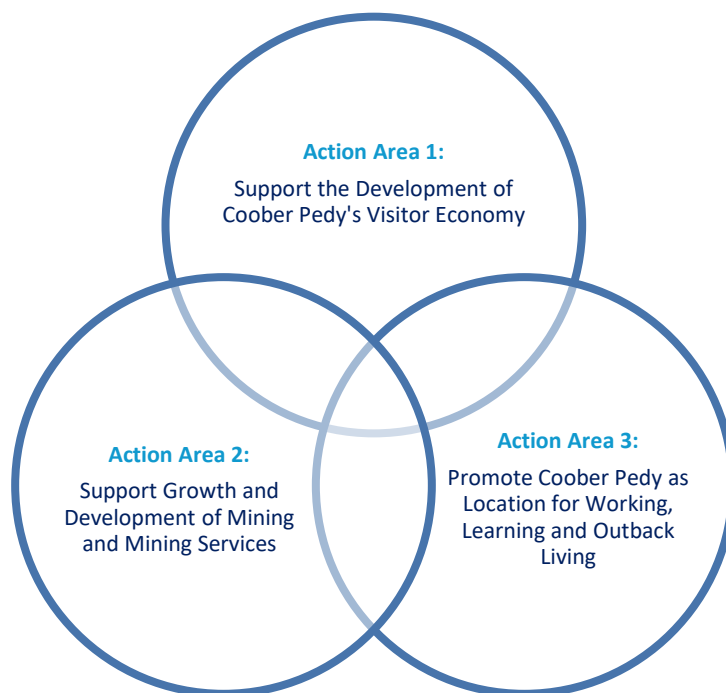
Economic Growth and Investment Strategy Themes and Actions

The Coober Pedy Economic Growth and Investment Strategy is defined by a set of 'economic development planning principles' which guide the preparation and implementation of the actions contained herein. It:

1. Prioritises initiatives and activities that support the growth and development of Coober Pedy's **'driver' industries of mining and tourism**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets.
2. Promotes a **partnership approach to tourism development**, working in collaboration with other tiers of government and the industry to enhance tourism branding, marketing, product development, visitor servicing and support infrastructure.
3. Prioritises activities which support the growth and development of Coober Pedy's **health care and education** sectors in line with the needs and aspirations of local businesses and the community.
4. Prioritises activities that support **industry diversification and the growth of 'new generation' industries** like alternative energy production and scientific, technical and professional services to mining.
5. Prioritises initiatives to **strengthen Coober Pedy's 'enabling' infrastructure**, including both physical and community infrastructure, which is fundamental to sustainable economic growth and development.

This Strategy provides the framework and directions for Coober Pedy's economic development, with the focus being on 19 actions across three strategic activity areas that can be achieved over the next three years.

Coober Pedy Economic Growth and Investment Strategy Themes



In summary, the actions are:

Action Area 1: Support the Development of Coober Pedy's Visitor Economy

- 1.1 Key stakeholders - Coober Pedy Retail, Business and Tourism Association, South Australian Tourism Commission (SATC), Flinders Ranges and Outback South Australia Tourism (FROSAT), Tourism Central Australia (TCA), tourism operators and other local businesses - to work collaboratively to develop and promote short-stay tourism packages that highlight Coober Pedy as a major stop-over between Adelaide and Darwin on The Explorers Way. Specifically target domestic visitors from Queensland and international visitors from Europe, the UK and North America to stop and stay in Coober Pedy for five nights or more.
- 1.2 Prepare a business case (economic and community benefits analysis) for upgrading (sealing) the road linking the Stuart Highway and the Kanku Breakaways Conservation Park.
- 1.3 Work with the Kanku-Breakaways Conservation Park Co-management Board to prioritise project opportunities (e.g. entry statements, signage, interpretation, infrastructure, etc.) to allow more visitors to Coober Pedy to experience the Kanku in line with the Kanku-Breakaways Conservation Park Management Plan.
- 1.4 Undertake preliminary investigations into opportunities to improve Ghan connections into Coober Pedy. This would include an upgrade to the road link from Manguri to Coober Pedy to address issues of flooding and options to bring the rail head (train station) directly into Coober Pedy.
- 1.5 Prepare a wayfinding strategy for Coober Pedy as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.
- 1.6 Develop a Coober Pedy and Outback Indigenous cultural tourism strategy incorporating the Kanku Breakaways Conservation Park and other product/experience linkages throughout Coober Pedy and the wider region.
- 1.7 Develop a social media tourism promotion strategy for Coober Pedy that leverages the South Australian Tourism Commission's digital strategy and which leverages Coober Pedy's profile as a location for shooting film and television.
- 1.8 Design and implement a Coober Pedy post-experience visitor survey program to improve awareness and understanding of visitor experiences and needs and to better target marketing resources.

Action Area 2: Support Growth and Development of Mining and Mining Services

- 2.1 Facilitate working relationships with mining companies and Coober Pedy community stakeholders throughout the mining lifecycle to encourage a sustainable future for mining in Coober Pedy and the surrounding region.
- 2.2 Investigate means for informing a policy position on support for local procurement targets within Coober Pedy's mining sector. Engage with local mining services companies and the mining companies operating in Coober Pedy and the region to develop a local procurement policy with support from all stakeholders.
- 2.3 Work with mining companies regarding current expansion and development projects to gain an understanding of workforce requirements; map skills requirements against existing training available in Coober Pedy and identify potential training programs to support local employment opportunities.
- 2.4 Work with mining companies, the Coober Pedy Area School and TAFE SA to explore opportunities for school-based apprenticeships and traineeships associated with planned mining activity in the region.
- 2.5 Work with the Antakirinja Matu-Yankunytjatjara Aboriginal Corporation (AMYAC), mining companies and other key stakeholders to establish and deliver Indigenous employment pathways in the local mining sector. This may include training, mentoring and workplace opportunities.
- 2.6 Collaborate with mining companies to develop a sustainable mining workforce accommodation strategy for Coober Pedy.

Action Area 3: Promote Coober Pedy as a Location for Working, Learning and Outback Living

- 3.1 Review and update the District Council of Coober Pedy's Development Plan and its Strategic Plan to articulate an updated vision, values, planning principles and priorities as part of a broader Far North regional planning framework.
- 3.2 Consistent with the outcomes of the updated Development Plan and Strategic Plan, collaborate with government, non-government and industry stakeholders to prioritise investments in the development and maintenance of Coober Pedy's community, lifestyle and recreation assets.
- 3.3 Investigate the feasibility of investing in water recycling infrastructure to use wastewater for irrigating the town's green spaces including its parks and gardens, streetscapes and the sports oval.
- 3.4 Prepare a Coober Pedy District Council Economic Development Plan which clearly articulates Council's economic development roles and functions and its priority economic development facilitation and promotion activities.
- 3.5 Collaborate with the Coober Pedy Retail, Business and Tourism Association to commission the design and development of a web-based Coober Pedy investor prospectus targeting

businesses and occupations in Coober Pedy's key industries of mining and mining services, tourism, health and education.

Priorities for Action – Informing a Short-term Work Plan

Priority projects and activities for implementation as part of an 18-month work plan are identified based on the application of two broad sets of assessment criteria – *benefit realisation* and *capacity to implement*. They reflect priorities that RDA Far North and the District Council of Coober Pedy should advance (in association with identified partners where relevant) as short-term priorities. The priorities are:

1. Key stakeholders - Coober Pedy Retail, Business and Tourism Association, South Australian Tourism Commission (SATC), Flinders Ranges and Outback South Australia Tourism (FROSAT), Tourism Central Australia (TCA), tourism operators and other local businesses - to work collaboratively to develop and promote short-stay tourism packages that highlight Coober Pedy as a major stop-over between Adelaide and Darwin on The Explorers Way. Specifically target domestic visitors from Queensland and international visitors from Europe, the UK and North America to stop and stay in Coober Pedy for five nights or more.
2. Prepare a business case (economic and community benefits analysis) for upgrading (sealing) the road linking the Stuart Highway and the Kanku Breakaways Conservation Park.
3. Work with mining companies regarding current expansion and development projects to gain an understanding of workforce requirements; map skills requirements against existing training available in Coober Pedy and identify potential training programs to support local employment opportunities.
4. Collaborate with mining companies to develop a sustainable mining workforce accommodation strategy for Coober Pedy.
5. Review and update the District Council of Coober Pedy's Development Plan and its Strategic Plan to articulate an updated vision, values, planning principles and priorities as part of a broader Far North regional planning framework.

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

Continuing Collaborative Partnerships for Effective Strategy Implementation

Promoting Coober Pedy's economic development 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 District Council of Coober Pedy 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 District Council of Coober Pedy to facilitate opportunities for investment to support long-term growth. Using the evidence presented in this report, it also supports Coober Pedy's engagement with both State and Federal Governments on matters of significance.

1. Introduction



1. Introduction

1.1 Strategy Purpose

Regional Development Australia Far North (RDAFN) in consultation with the District Council of Coober Pedy (DCCP) commissioned the preparation of this Coober Pedy Economic Growth and Investment Strategy (EGIS) to help address key challenges and capitalise on opportunities for Coober Pedy's economic development. 'Coober Pedy', for the purpose of this Strategy, refers the District Council area of Coober Pedy. This EGIS addresses Coober Pedy's economic development challenges and prospects with a focus on providing opportunities for investment to support long-term growth.

The Coober Pedy Economic Growth and Investment Strategy is informed by an evidence base to support Coober Pedy's (and the wider Far North Region's) engagement with both State and Federal Governments on matters of both local and regional significance, which require further attention. It includes a comprehensive and up-to-date analysis of Coober Pedy's economic stocks and flows - both in and out of the local area - identifying its connections and interrelationships with the broader South Australian, national and global economies.

The Coober Pedy EGIS has been prepared on the understanding 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 District Council of Coober Pedy, it informs a strategic and targeted approach to project selection to maximise the economic benefits of funding packages or other resources directed to the District Council of Coober Pedy area and the wider Far North Region.

1.2 Strategy Outcomes

The Economic Growth and Investment Strategy identifies activities and projects which will have immediate, medium and long-term economic benefits for the Coober Pedy community. It highlights planning and project priorities to facilitate change towards a robust and sustainable economic future. By documenting Coober Pedy's economic stocks and flows, the 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 District Council of Coober Pedy's boundary.

In short, this Economic Growth and Investment Strategy:

1. Provides an understanding of how Coober Pedy connects economically and socially and the interdependencies across the Far North Region;
2. Shows how Coober Pedy contributes to the state and national economies and the level of outflow or leakage from Coober Pedy to other centres such as Adelaide;
3. Identifies projects that have good prospects to contribute positive employment outcomes for the community of Coober Pedy 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 be available need to be targeted to maximise positive investment, economic development and employment outcomes.

The Economic Growth and Investment Strategy identifies the Coober Pedy economy's existing and potential supply chain links, between local business and industry and economic activity located external to the local area. It recognises and promotes Coober Pedy'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 Coober Pedy and it articulates the area's key attributes and its most pressing challenges. This ensures the District Council of Coober Pedy 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 in Coober Pedy and the surrounding area.

This is one of five economic growth and investment strategies that have been prepared for the Far North Region of South Australia. The Coober Pedy Economic Growth and Investment Strategy, along with those prepared for Roxby Downs, Flinders Ranges, 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 to 18 months.

1.3 Strategy Framework

Addressing the Determinants and Enablers of Economic Development

The Coober Pedy Economic Growth and Investment Strategy recognises 'economic development' as the continuous process of growing an area's level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community. Typically measured in terms of income and employment, economic development is also measured by improvements in education, skills, health, culture, community wellbeing, 'place' and the environment. Ultimately, economic development is about improving quality of life, or put more simply, it is about delivering prosperity.

To be more prosperous, regions need to build on their comparative and competitive strengths by finding new ways of doing things or doing what they do now, better. This means economic development is also about innovation. To 'innovate' means to introduce a new process or way of doing things. This is a popular concept in economic development theory and practice because innovation and the commercialisation of new ideas is one of the means by which industry can boost productivity to contribute to a more competitive local economy.

Innovation, and by implication, the ability to attract investment and support industry growth is a team effort, and no matter how well run a business enterprise is, or how well-integrated a local industry, innovation needs to be supported by good regional governance. And good regional governance is defined by the factors that reduce investment and operating uncertainty such as transparency in government processes, strong leadership and good infrastructure management.

With this in mind, efforts to stimulate economic growth and investment in Coober Pedy must be cognisant of the determinants and enablers of 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 local or 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 Coober Pedy's economy, and central to the its competitiveness, is its natural resources. 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 (such as minerals or extractives), or as a foundation for services such as tourism and recreation.

As natural resources underpin livelihoods, so too are they the backbone of the region's communities. It follows then that natural resource management is critical to developing and maintaining a comparative economic advantage as it underpins Coober Pedy's 'driver' industries of tourism and mining. 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 mining impacts and sustainable water resources for the local community.

Building on existing attributes does not mean Coober Pedy cannot diversify its economy. Rather, business and industry can benefit if Coober Pedy 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.

Figure 1. Determinants and Enablers of Economic Development



Source: SC Lennon & Associates

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 Coober Pedy take advantage of new opportunities, overcome challenges and make the area 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 they can 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 (including roads, rail, 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 District Council of Cooper Pedy, government agencies and service providers can help ensure these fundamentals for investment and economic development are addressed by identifying key infrastructure challenges and shortfalls, and liaising with private infrastructure and service providers on matters of regional significance and opportunities for development.

Identifying Cooper Pedy's infrastructure investment priorities is essential if economic development opportunities are to be strategically pursued and to ensure any critical gaps can be addressed.

Access to Local, National and International Markets

Access to international, national and local / regional markets includes access to trading partners, clients and labour. Improving Cooper Pedy'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 local community.

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 local economic development. No one agency can be all things to all people and no one level of government can fully respond to the

particular needs and circumstances of the Cooper Pedy community. In Cooper Pedy, like anywhere, multi-faceted institutional considerations are required for any project approval. Hence, collaborative partnerships - between the Council, RDA Far North and others - are essential for co-ordinating the activities and investments of different stakeholders.

The Cooper Pedy Economic Growth and Investment Strategy and the activities which inform it play an important role in articulating a shared understanding of Cooper Pedy's social, environmental and economic development priorities and opportunities for investment. As noted above, a critical input to the local economy, and central to the its competitiveness, is its natural resources.

South Australian Arid Lands Natural Resources Management (SAAL NRM) is the organisation responsible for ensuring the sustainable use of the wider region's resources, including water, soils, plants and animals. As articulated on the SAAL NRM website, the natural systems and human activities in the SAAL NRM 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.

The Antakirinja Matu-Yankunytjatjara Aboriginal Corporation (AMYAC) is responsible for managing the Native Title rights and interests of the Antakirinja Matu-Yankunytjatjara Native Title holders in and around Cooper Pedy. AMYAC has made a number of key agreements with many of the stakeholders in the region, including in relation to 16 Pastoral Leases, Tallaringa Conservation Park and the Breakaways, an iconic area of natural beauty which is emerging as an iconic visitor attraction. More recently, the South Australian Government and AMYAC have made an Agreement in relation to the Cooper Pedy Precious Stones Field and are in the process of negotiating matters concerning the Cooper Pedy township.

Engaging SAAL NRM, the AMYAC, the Department of Environment, Water and Natural Resources and others will be critical to facilitating and promoting a holistic approach to sustainable economic development. Effectively promoting and facilitating economic development in Cooper Pedy will require all key stakeholders to work in partnership with each other, with the resident community of Cooper Pedy and local businesses, to strategically address its most pertinent challenges and opportunities for economic development. To do this effectively requires a strategic, informed and targeted approach.

The recommended actions presented in this Strategy are themed, each theme reflecting Cooper Pedy's economic development 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 District Council of Cooper Pedy by focussing on those determinants and enablers of 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 Coober Pedy Economic Growth and Investment Strategy responds to RDA Far North's and the District Council of Coober Pedy's commitment to promoting and facilitating economic development. It is defined by a set of principles which guide the preparation and implementation of the actions contained in this strategy.

The economic development planning principles reflect a desire to encourage a holistic approach to economic development in Coober Pedy, 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.

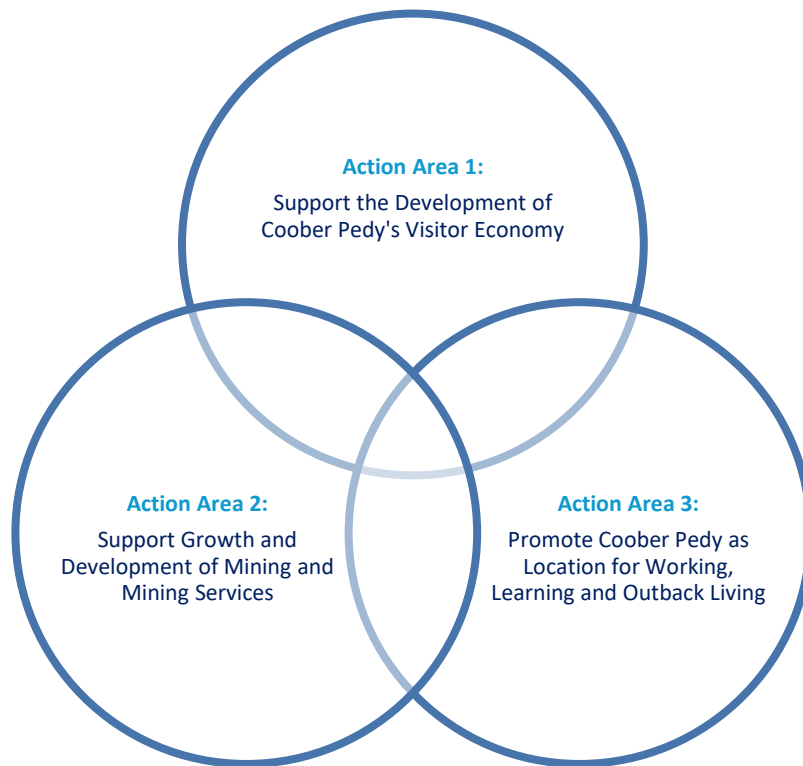
In essence, the Coober Pedy Economic Growth and Investment Strategy:

1. Prioritises initiatives and activities that support the growth and development of Coober Pedy's **'driver' industries of mining and tourism**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets.
2. Promotes a **partnership approach to tourism development**, working in collaboration with other tiers of government and the industry to enhance tourism branding, marketing, product development, visitor servicing and support infrastructure.
3. Prioritises activities which support the growth and development of Coober Pedy's **health care and education** sectors in line with the needs and aspirations of local businesses and the community.
4. Prioritises activities that support **industry diversification and the growth of 'new generation' industries** like alternative energy production and scientific, technical and professional services to mining.
5. Prioritises initiatives to **strengthen Coober Pedy's 'enabling' infrastructure**, including both physical and community infrastructure, which is fundamental to sustainable economic growth and development.

Informed by the findings from the economic research and analysis, the Economic Growth and Investment Strategy provides the framework and directions for Coober Pedy's economic development, with the focus being on 19 individual actions across three strategic activity areas that can be achieved over the next three years.

The Economic Growth and Investment Strategy will be implemented by RDA Far North in collaboration with the District Council of Coober Pedy as the lead agents, working in partnership with other key stakeholders including industry bodies, non-government organisations and government agencies.

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 Coober Pedy Economic Growth and Investment Strategy is designed to help facilitate investment in the Coober Pedy township and surrounds and encourage established businesses to invest further into developing the local economy.

To do this effectively requires an informed and targeted approach. Hence, understanding Coober Pedy's economic stocks and flows is essential.

2. Economic Stocks and Flows



2. Economic Stocks and Flows

2.1 Overview of the Coober Pedy Economy

Coober Pedy's Gross Regional Product (GRP) is estimated at \$91.82 million, which is 3% of the wider Far North Region's GRP and approximately 0.08% of South Australia's Gross State Product (GSP). GRP per worker in Coober Pedy is \$135,000 and GRP per capita is \$52,000. This compares to South Australia's GSP per capita in 2016/17 of approximately \$62,100.

Economic activity in Coober Pedy is concentrated in mining and tourism. Together, these industries drive the local economy and the activities of Coober Pedy's other industries is underpinned by the success or otherwise of economic activity and employment in Coober Pedy's mining and tourism sectors.

The strength of Coober Pedy's visitor economy is underpinned by its profile as Australia's 'opal capital' and associated underground and outback experiences. There is potential for growth and diversification of Coober Pedy's tourism offer, as national and international market trends support opportunities to capitalise on demand for outback experiences including natural and historical attractions. Coober Pedy's tourism industry employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail trade (which is one of the largest employers in Coober Pedy) and transport.

The Far North has undergone a period of transition as a result of the mining slow-down and industry closures. Some of these are related, such as the winding back of rail services across the region as mining activity decreases and there is less demand for minerals haulage. There has also been a decline in retail and property market activity as wages and salaries fall or individuals and families leave the area in search of work elsewhere.

Mining, which accounts for one-quarter of the value of Coober Pedy's total industry output, has played a major role in the economic prosperity of South Australia, and much of that activity has been centred in the Far North with the returns from minerals extraction benefiting businesses and residents throughout the State and beyond. Despite the national impacts of the mining downturn, in Coober Pedy, unemployment levels, although higher than the comparative State and national averages, have remained fairly steady, and in recent times, have shown a gradual decline.

Nevertheless, the continued transition of the mining industry requires consideration when planning for ways to influence future economic development. Challenges impacting upon the Far North Region include decreasing demand for fossil fuels, the fall of the Australian dollar and technological change. Whilst some of these impacts have the potential to be negative, there are also opportunities upon which Coober Pedy and the wider Far North can capitalise. Small business constitutes an important plank in the Coober Pedy economy and enhancing this sector's capacity to 'do business' will be critical to supporting economic diversification and growth.

The health care and social assistance sector employs more people than any other industry in Coober Pedy, accounting for almost 20% of local jobs. Other key service sectors which employ a large share of the local workforce include the education sector and the public service. As well as being drivers of economic activity in their own right, Coober Pedy's health and education sectors are important

enablers of economic development as they are essential for facilitating community wellbeing and the productive capacity of the local workforce.

The significance of mining and related support industries, and tourism as drivers of the Coober Pedy economy and as potential pillars of future economic prosperity, is illustrated in the economic stocks and flows analysis.

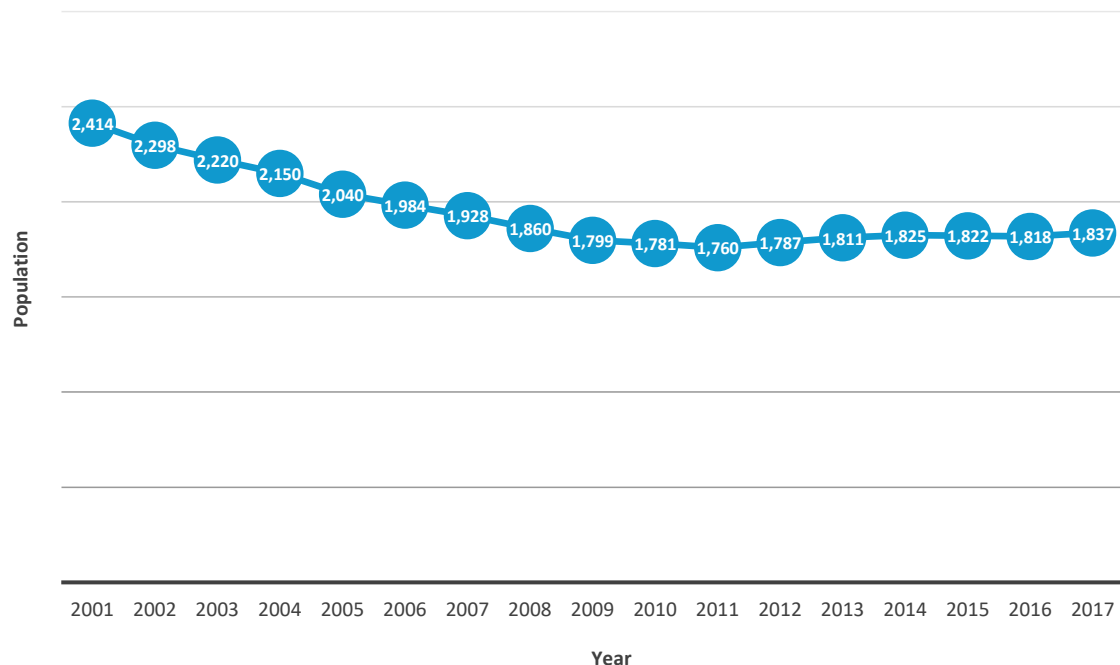
2.2 Coober Pedy's Socio-Economic Structure and Dynamics

Population

According to the Australian Bureau of Statistics' 2017 Estimated Resident Population, Coober Pedy has a resident population of 1,837. However, the itinerant and 'part-time' nature of a large number of people who call Coober Pedy home, at least for part of the year, means that at times the local population can be as high as around 3,500 according to District Council of Coober Pedy estimates.

The estimated resident population is the official Australian Bureau of Statistics (ABS) measure of the population of areas in Australia according to a usual residence. The Coober Pedy estimates are based on the District Council of Coober Pedy local government area. As illustrated below, the resident population of Coober Pedy has declined steadily since 2001. However, in more recent years (since 2012), Coober Pedy's population has shown a gradual increase, from 1,787 in 2012 to 1,837 in 2017, representing an average annual increase of 0.6 per cent.

Figure 3. Population Trend, Coober Pedy, 2001 to 2017



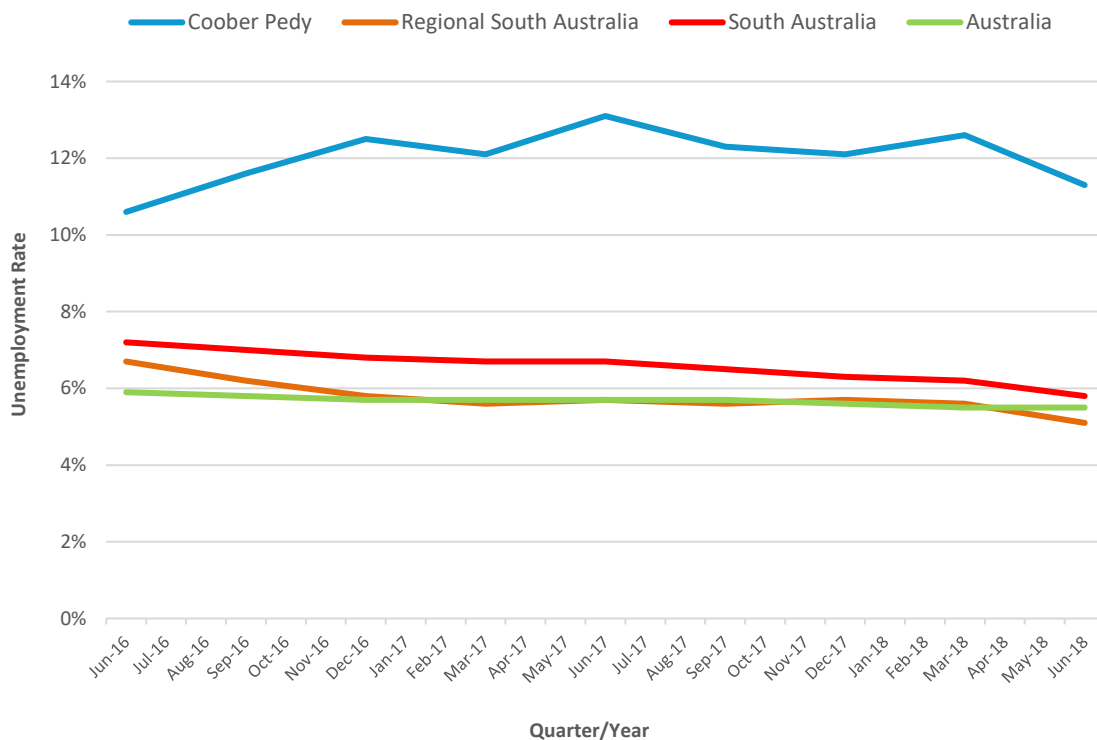
Source: Australian Bureau of Statistics (2018)

Unemployment Trends

According to data sourced from the Department of Jobs and Small Business, Coober Pedy's labour force (as at June 2018) totals 876. Of those, 99 people are reported as unemployed. Over the two-year period between June 2016 and June 2018, the unemployment rate in Coober Pedy increased from 10.6% to 11.3%. Over the period, Coober Pedy's unemployment rate peaked at 13.1% in June 2017.¹

As illustrated in Figure 4 Coober Pedy's unemployment rate (as reported by the Australian Government) is notably higher than the unemployment rates for regional South Australia and the State as a whole and the national average. Since June 2017, consistent with the State and national averages, the unemployment rate in Coober Pedy has been in gradual decline.

Figure 4. Unemployment Rates, Coober Pedy, Regional South Australia, South Australia and Australia, June 2016 to June 2018



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

¹ The Department of Jobs and Small Business notes that, due to the small size of the labour force, particular care should be exercised when interpreting these estimates.

2.3 Economic Stocks and Flows

Employment by Industry

Figure 5 overleaf illustrates Coober Pedy's profile of employment by industry (that is, the number of employees whose place of work is located within the District Council of Coober Pedy local government area).² 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.

The service sector provides for a substantial share of jobs in Coober Pedy, in Health Care and Social Assistance, Tourism, Public Administration and Safety, Retail Trade and Education, which collectively account for almost three-quarters (71.5%) of local employment. The Health Care and Social Assistance sector employs more people than any other industry in Coober Pedy, accounting for almost 20% of all jobs compared to 9% of jobs across the wider Far North Region. Over half of these health care sector jobs (or 11% of total employment in Coober Pedy) are in Health Care Services, with the remainder (8% of total employment) in the Residential Care and Social Assistance sub-sector.

The public service is the third-largest provider of jobs in Coober Pedy (13% of the total). Coober Pedy's Public Administration and Safety sector includes local government services (the District Council of Coober Pedy), police, fire protection and emergency services and other regulatory services.

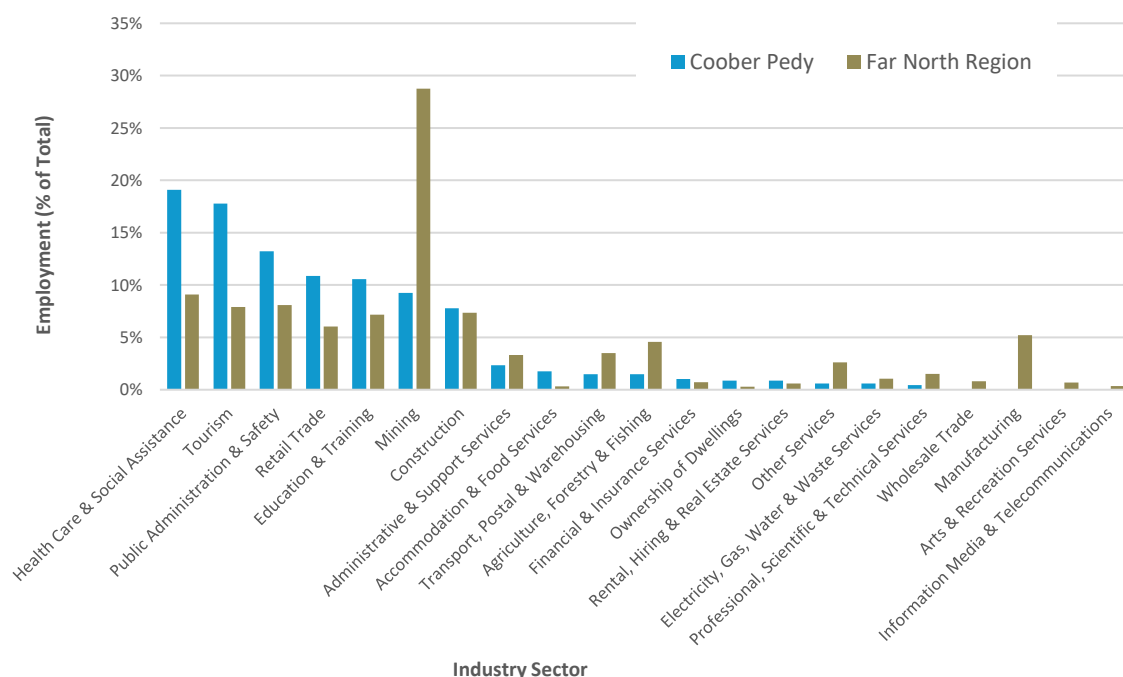
To better capture the true size and value of tourism, REMPLAN quantifies the tourism sector as a stand-alone industry. The tourism industry is an amalgam of activities across various sectors including Retail Trade, Accommodation and Food Services, Arts and Recreational Services and Transport, Postal and Warehousing and Administrative and Support Services. 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. The REMPLAN modelling estimates that for each dollar spent by a tourist in Coober Pedy, \$0.78 is spent on Accommodation and Food Services, \$0.15 on Ownership of Dwellings, \$0.04 on Retail Trade and \$0.02 on Administrative and Support Services.

The total value of Coober Pedy's tourism output is estimated at \$23.8 million, which is 14.5% of the value of Coober Pedy's total output. As illustrated in Figure 5, Coober Pedy's tourism industry is one of its largest employers, accounting for 18 per cent of local jobs (and 8% of jobs across the wider Far North Region). Employment numbers in this sector are higher than in Coober Pedy's other service industries with the exception of Health Care and Social Assistance.

Australia's tourism industry continues to grow as new domestic and international visitor markets emerge. According to IBISWorld (2017), over the five years to 2022-23, Australia's tourism industry revenue is expected to increase at an average annual rate of 3.0% to total over \$150 billion. There is potential for growth and diversification of Coober Pedy's tourism offer, as national and international market trends support opportunities to capitalise on demand for outback experiences including natural and historical attractions.

² The employment data presented in this report represents the number of people employed by businesses / organisations in each of the industry sectors in Coober Pedy. 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.

Figure 5. Employment by Industry, Coober Pedy and Far North Region, 2017



Source: REMPLAN, June 2018

Mining also provides for a large share of jobs located in Coober Pedy, accounting for 9% of total employment. However, as the majority of South Australia's mining activity takes place in the Far North Region, where the industry accounts for more than one-quarter of all jobs, mining's contribution to employment in Coober Pedy is relatively modest by regional standards.

Mining activity in and around Coober Pedy is split between non-metallic mineral mining (opals) and non-ferrous metal ore mining (copper, gold, silver and other metals), iron ore mining as well as oil and gas extraction and some coal mining.

Opal mining is synonymous with Coober Pedy, which is widely regarded as the opal capital of the world. Continued interest in opal mining together with existing and emerging operations in copper, silver, gold and iron ore magnetite in the surrounding area presents opportunities for mining industry employment creation and associated mining services activities.

Industry Output and Value-Added

The REMPLAN economic modelling which informs this Economic Growth and Investment Strategy uses a combination of inputs including data from the ABS 2016 Census of Population and Housing, ABS 2016 Census Journey to Work (JTW) employment data, ABS 2014 / 2015 National Input Output Tables and ABS June 2017 Gross State Product.

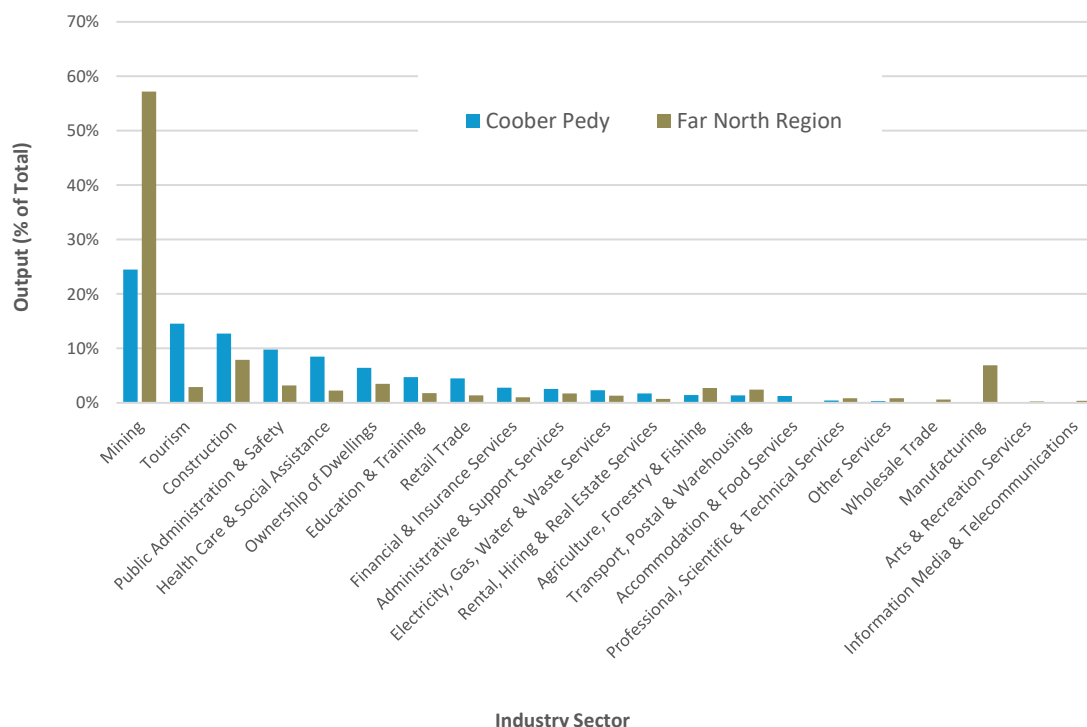
The economic modelling estimates Coober Pedy's total value of economic output, that is, total gross revenue generated by all businesses and organisations located in Coober Pedy, at approximately \$164 million. Coober Pedy's mining sector accounts for one-quarter (24.5%) of economic output with non-ferrous metal ore mining accounting for the largest share of resource sector activity in the area (gold, copper, silver and other metals).

Other industries which make notable contributions to Coober Pedy's gross revenue are Tourism (14.5% of the total value of local output), Construction (12.8%), Public Administration and Safety (9.8%), Health Care and Social Assistance (8.5%) and Ownership of Dwellings (6.5%).³

Construction activity in Coober Pedy is split between residential construction services (48% of the value of construction industry output), residential building construction (40% of construction industry output) and heavy and civil engineering construction (12%).

The tourism industry's contribution to Coober Pedy's economic output is predominantly in the Food and Accommodation Services sector, with the other contributors being Ownership of Dwellings and Retail Trade.

Figure 6. Output by Industry, Coober Pedy and Far North Region, 2017



Source: REMPLAN, June 2018

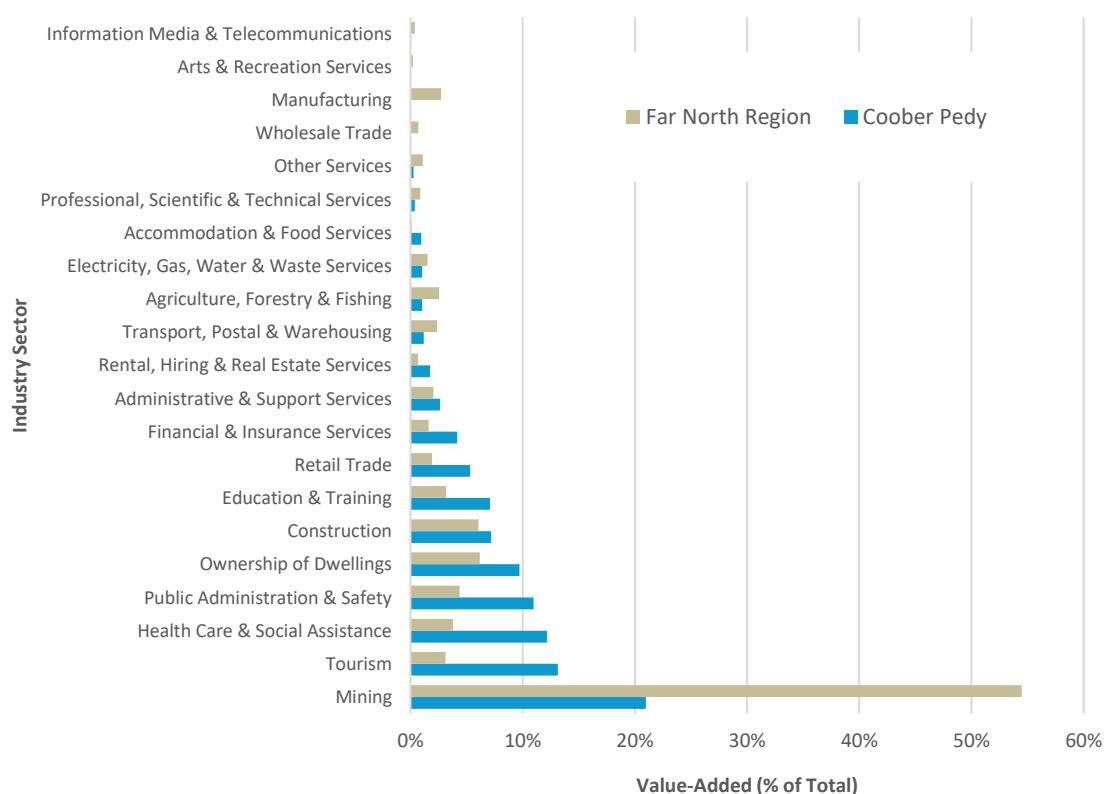
The economic model also calculates industry value-added, which is the value that is added by industry sectors in Coober Pedy to intermediate inputs. Value-added is considered to be a better reflection of the strength or otherwise of a local or regional economy because it refers to only the value of output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

³ Ownership of dwellings is the provision of housing services by the owner of a dwelling to its occupants, irrespective of whether the owner is also an occupier. Owner-occupiers are regarded as operating a business that generates a gross operating surplus. The imputation of a rent to owner-occupied dwellings enables the services provided by dwellings to their owner-occupiers to be treated consistently with the marketed services provided by rented dwellings to their tenants. Owner-occupiers are regarded as receiving rents (from themselves as consumers), paying expenses, and making a net contribution to the value of production which accrues to them as owners.

The total value-added estimate for Cooper Pedy is \$84.3 million, which is approximately 3% of the total value-added for the whole Far North Region. The majority of Cooper Pedy's industry value-added is attributable to mining, which accounts for 21 per cent of the total. Other notable contributors include Tourism (13.1% of total value-added), Health Care and Social Assistance (12.2%), Public Administration and Safety (11%) and Ownership of Dwellings (9.7%).

Of interest is the relative size of the various services sectors as a contributor to industry value-added in Cooper Pedy compared to the wider Far North Region. Although small in number, Cooper Pedy generates a relatively higher contribution to the value of local economic activity in its Health Care and Social Assistance, Public Administration and Safety and Education and Training sectors. This reflects the remoteness of the Cooper Pedy township and its role as the service centre for residents and businesses.

Figure 7. Value-Added by Industry, Cooper Pedy and Far North Region, 2017



Source: REMPLAN, June 2018

Also of interest is the relative size of the Financial and Insurance Services sector as a contributor to industry value-added in Cooper Pedy (4.1% of total value-added in Cooper Pedy compared to 1.6% for the wider Far North Region). This sector consists of banking, other financial intermediation services and financial asset investing. This reflects the important role of the Cooper Pedy township as a financial services centre for residents and businesses in the town and surrounding areas.

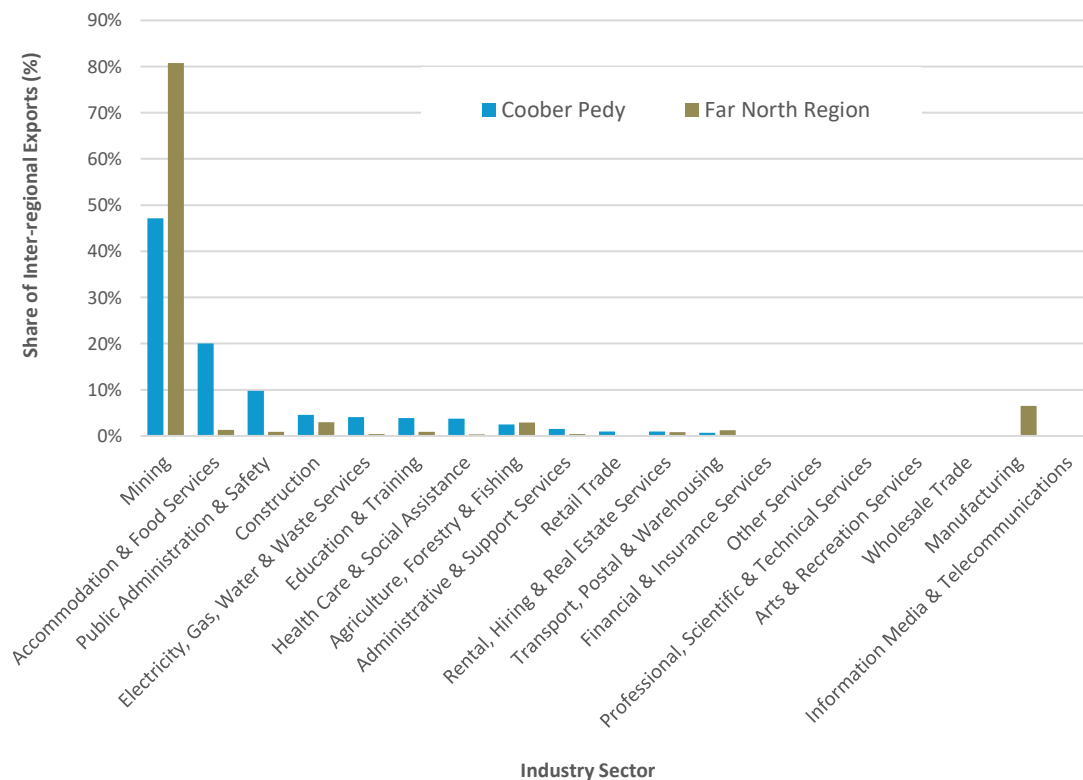
Inter-regional Exports

Economic modelling shows the value of goods and services produced by industry sectors in Coober Pedy that are sold to consumers, businesses, and governments based outside the area'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 exports for Coober Pedy is \$78.8 million, which is 48% of local economic output.

Mining is the largest contributor to Coober Pedy's exports (47% of total export value compared to 80% for the wider Far North Region). This is followed by Accommodation and Food Service which accounts for 20% of Coober Pedy's regional exports. By comparison, the Accommodation and Food Services sector accounts for just 1.3% of the Far North Region's exports, highlighting the significance of tourism to the Coober Pedy economy.

The other notable contributor to Coober Pedy's regional exports is the Public Administration and Safety sector, which accounts for 10% of the total value of regional exports.

Figure 8. Inter-regional Exports by Industry, Coober Pedy and Far North Region, 2017



Source: REMPLAN, June 2018

Import Replacement Opportunities

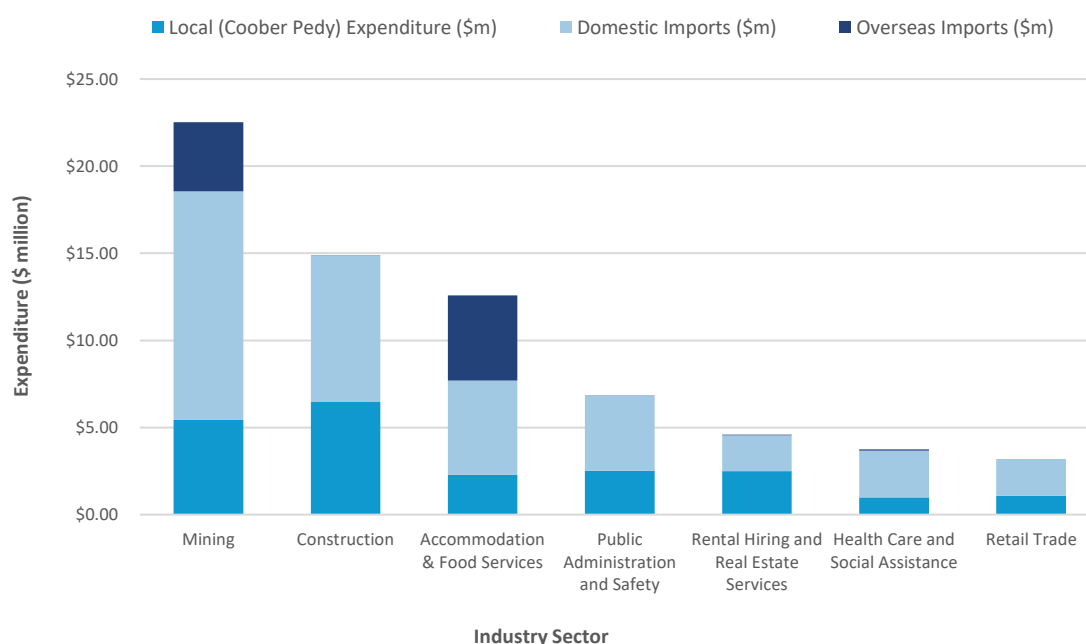
Figure 9 shows the value of expenditure by industries in Coober Pedy by geographic location of purchase. For selected industries, it shows the amount businesses located in Coober Pedy collectively spend on goods and services which are purchased from within the local (District Council of Coober Pedy) area, imported from the elsewhere in Australia and overseas, respectively. Only those industries which generate \$5 million or more in industry value-added are shown in the chart.

Of the \$12.6 million spent by Coober Pedy's Accommodation & Food Services sector on goods and services, 18% is spent locally, the remainder being spent elsewhere in Australia (43%) or overseas (39%). 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.

Of the \$22.5 million spent by Coober Pedy's mining industry on goods and services, 24% is spent locally, the remainder being spent elsewhere in Australia (58%) or overseas (18%). This shows that the mining industry's linkages through other sectors in the local economy are not strong, suggesting more could be done to facilitate import replacement in the local resources sector. Coober Pedy's construction industry sources its inputs either locally (56% of the total) or from elsewhere in Australia (44% of purchases).

There may be scope to replace expenditure on imports in Coober Pedy's mining and construction industries however, this will depend on which imports are 'contestable', that is, those items that can be produced and supplied competitively using local capabilities.

Figure 9. Selected Industry Expenditure Breakdown by Location, Coober Pedy, 2017



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

Cooper Pedy's 'Driver' Industries

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

Mining and tourism are Cooper Pedy's economic drivers, accounting for the largest share of the industry output, jobs and exports out of the region. The Tourism sector is the largest contributor to local employment, output and value added 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 and Support Services.

Despite mining's contribution to Cooper Pedy's industry value-added and exports, the industry's backward linkages through other sectors in the local economy are not strong. This suggests more could be done to facilitate import replacement in the local resources sector.

Figure 10. Cooper Pedy's 'Driver' Industries

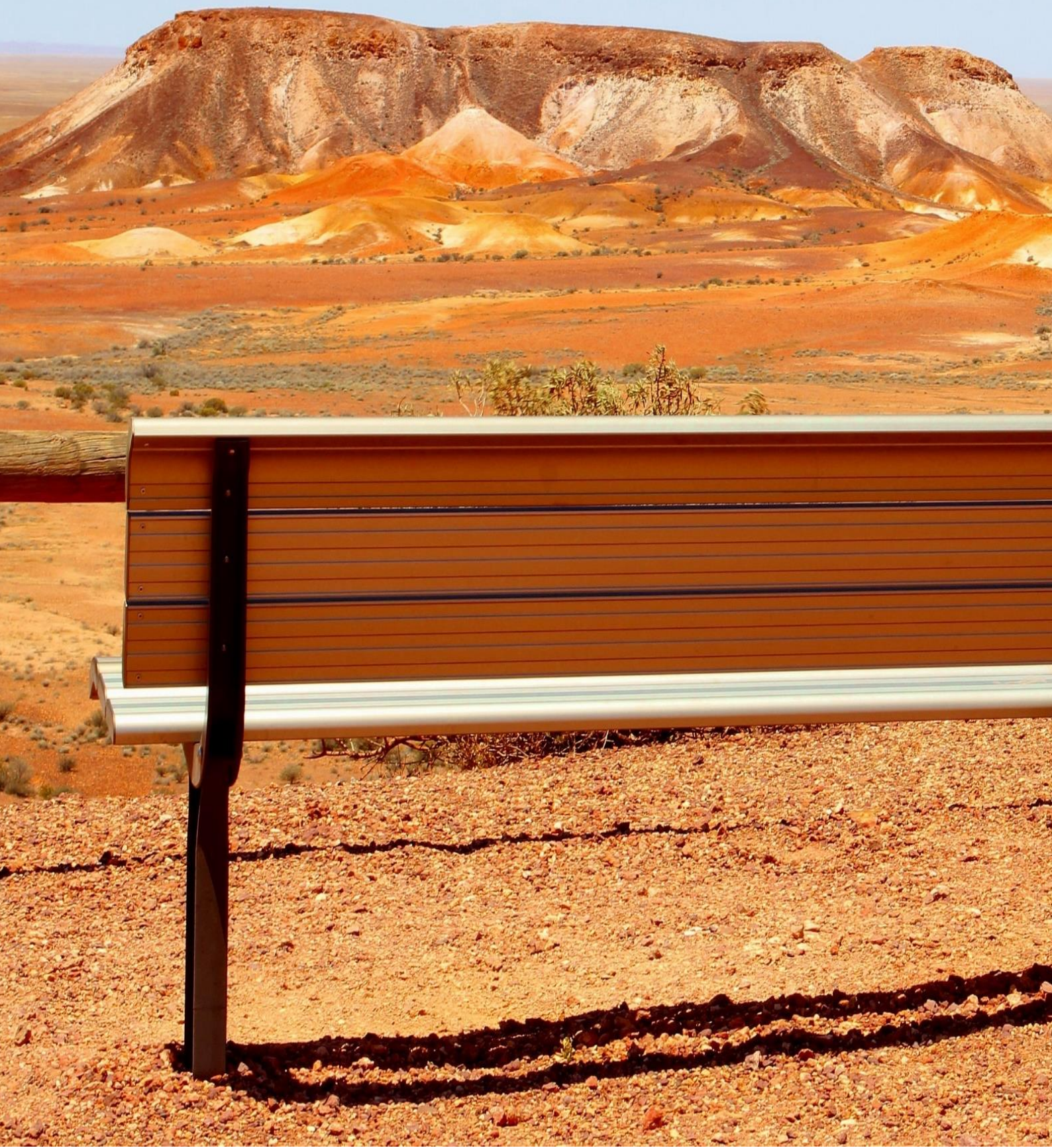
	Backward Linkages	Exports	Employment	Value Added
Tourism		✓	✓	✓
Mining		✓		✓
Public Administration and Safety		✓	✓	✓
Health Care and Social Assistance			✓	✓
Construction	✓	✓		✓

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

The strength of the Public Administration and Safety sector highlights the important role of government as a provider of local jobs and contributor to economic activity in Cooper Pedy.

Health Care and Social Assistance and Construction also display the attributes of 'driver' industries in the local economy and for this reason, further attention should be paid to these sectors in efforts to diversify and grow Cooper Pedy's economy.

3. Coober Pedy's Economic Development Priorities



3. Coober Pedy's Economic Development Priorities

3.1 Support the Development of Coober Pedy's Visitor Economy

Challenges and Opportunities for Growth and Investment

Built on its remote outback location in the semi-desert region of South Australia, its world-renowned opal mining industry and the town's iconic and unique subterranean lifestyle, tourism is a driver of Coober Pedy's economy. The total value of Coober Pedy's tourism output is estimated at \$23.8 million, which is 14.5% of the value of Coober Pedy's total output. Tourism is also one of Coober Pedy's largest employers, accounting for 18 per cent of local jobs. The connection between Coober Pedy's opal mining industry and its visitor economy is highlighted each year during the annual Coober Pedy Opal Festival.

Coober Pedy is served by flights from Adelaide and Port Augusta six days a week and it is a destination for 'off-train' excursions for travellers on the Ghan Railway linking Adelaide to Alice Springs, Katherine and Darwin. However, it is the drive tourism market which generates the bulk of tourism activity in and around Coober Pedy. Coober Pedy is a base for many outback treks and tours supported by the region's vibrant Indigenous cultural heritage and the area's European history. Visitors are also attracted to Coober Pedy's varied landscapes, from the barren 'moon plains' of the opal mines to the natural landscapes of the Kanku Breakaways Conservation Park and the world's longest (5,300-kilometre) dog fence.

A Short Tourist Season

The tourist season in Coober Pedy extends from April to September. Despite the significance of tourism to the local economy, the visitor season is limited by the climate. From October to March the average daily maximum temperature is in the high 30s and this can be off-putting for many potential tourists. On the other hand, the winter climate is very pleasant with June, July and August at around 20 degrees on average, contributing to the appeal of Coober Pedy and the wider Outback region as a winter visitor destination of choice.

There is potential for growth and diversification of Coober Pedy's tourism offer, as market trends support opportunities to capitalise on growing demand for outback experiences including natural and historical attractions. Regional Australia's visitor economy is on an upward trajectory with visitors increasing on average by 4.1 per cent per annum over the past five years.⁴ The South Australian Tourism Commission (SATC) reports that South Australia's visitor economy is at an all-time high, with a value of \$6.7 billion, up over 30 per cent in only 4 years and on track to achieve the State's \$8.0 billion target by 2020.

Outback Drive Tourism Opportunities for Growth

Outback tourism is growing rapidly with the natural landscape being the major drawcard. International visitors are seeking new experiences and the domestic drive market is also growing. Key measures of success for Outback South Australia's drive tourism market include the number of tourists embarking on self-drive journeys, the length of their journeys, the time they spend in particular places and the amount of money they spend. This market is expected to experience significant growth due to Australia's ageing population and a corresponding increase in retirees who travel around Australia.

⁴ <http://www.tourisminvestment.com.au/en/investment-opportunities/Regional-Australia.html>

The 'grey nomad' phenomenon is generating new income opportunities for many regions throughout the Australian outback. Regions throughout Australia are taking full advantage of the growth in demand for drive tourism experiences by promoting touring routes and providing the facilities and services that visitors seek. The Savannah Way, which links Queensland's Tropical North with the Kimberley in Western Australia is a case in point.

Coober Pedy sits along the Explorers Way (Adelaide to Darwin) drive tourism route in the Flinders Ranges and Outback tourism region. According to the South Australian Tourism Commission (2017), 94 per cent of overnight visitors to the Flinders Ranges and Outback are domestic visitors, and 45 per cent of domestic visitor nights in the region are spent either with friends or relatives or in hotels and similar accommodation. Around one-third (35%) 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.

Length of Stay

The average length of stay of domestic travellers to the Flinders Ranges and Outback region is 4 nights. Accommodation facilities in Coober Pedy include hotels and motels (including a 5-star hotel), bed & breakfast accommodation and caravan and camping facilities. Caravan and camping is popular with one-third (34%) of visitors to the Flinders Ranges and Outback region preferring this type of accommodation. This includes those who opt to stop and stay in 'free' camping sites, including rest areas in and around the region's townships.

A number of drive tour visitors to Coober Pedy choose free camping sites over paid accommodation in town. At present, Coober Pedy does not offer a dedicated managed free camping space. The extent to which free camping translates into visitor expenditure in Coober Pedy is uncertain and it is considered that more research is required to better understand the impacts of free camping on Coober Pedy's visitor economy.

Coober Pedy receives approximately 17% of total visitor numbers to the Flinders Ranges and Outback region and around 10% of total overnight stays within the region. According to Tourism Research Australia (TRA)⁵, 84% of all overnight visitors to Coober Pedy are domestic visitors and the average length of stay is 3 nights. Over three-quarters of all overnight visitors (79%) are visiting on holidays while the remaining 21% visit Coober Pedy for business purposes. Coober Pedy receives a higher proportion of international visitors than the wider Flinders Ranges and Outback region. Of the 16% of visitors to Coober Pedy who come from overseas, most are from the United Kingdom and Germany with the United States accounting for the remainder. However, the length of stay is relatively short with international visitors to Coober Pedy staying an average of just 2 nights.

Despite rising demand from international visitors in recent years, regional Australia's tourism industry relies on domestic visitors, with Australian households and businesses accounting for more than 70% of the industry's revenue. According to IBISWorld (2017), over the five years to 2022-23, Australia's tourism industry revenue is expected to increase at an average annual rate of 3.0% to total over \$150 billion. Over the next five years, the industry is expected to further enhance its online capabilities as consumers increasingly use the internet to research and organise trips.

Visitor accommodation occupancy rates in the Flinders Ranges and Outback region, at 42%, currently sits well below the regional South Australian average of 51%.⁶ Growing the drive tourism market by encouraging drivers to stop and stay in Coober Pedy for longer presents an opportunity to grow the town's visitor economy. This will

⁵ Tourism Research Australia, Tourism Statistics for Coober Pedy (DC), 2017

⁶ Government of South Australia (May 2018)

require a strategic and informed approach to critical infrastructure investment to ensure Coober Pedy has the capacity to accommodate more vehicles and more people.

Tourist Road Infrastructure

The road from Coober Pedy to the Ghan railway station at Manguri (approximately 40 kilometres away) and the currently-unsealed road to the Kanku Breakaways Conservation Park are cases in point. For example, even light rain makes the road off the Stuart Highway to the Breakaways impassable on some days and challenging for non-4WD cars and coaches on any other day. The road between Coober Pedy and Manguri (the Anne Beadell Highway) is also subject to flooding. Upgrading the road or exploring options to bring the rail head (train station) into Coober Pedy are options that have been raised and which could be explored further.

Tourism traffic also impacts on roads in and around Coober Pedy placing a strain on Council resources which fund local road maintenance from a small rate base. Wear and tear on local roads also compromises road standards required to accommodate emergency services vehicles as well as freight traffic.

Further afield, touring routes in the Outback are well known to the serious four-wheel drive fraternity, but there is a potential to build on this and to widen the area's appeal. Research by the South Australian Tourism Commission has shown visitors generally enjoy their time in the Outback, with 75% finding travelling to more than one place in the region appealing. A lack of adequate directional signage however, has been reported as an issue for the region.

Regional and remote communities like Coober Pedy can benefit from the income generated from drive tourists (on stopovers), as those passing through often buy local tourism products and services, and basic travel necessities like fuel, food and other supplies. Drive tourism provides a number of benefits to businesses, including: opportunities for new business start-ups; increased demand for new products and services; opportunities for business collaboration; and additional income and employment.

Local-Regional Tourism Promotion and Product Diversification

Tourism development in Coober Pedy needs to be considered within the context of linkages provided by broader touring routes throughout the Outback region (and beyond) and connectivity to other regional icons (e.g. The Flinders Ranges) and major service centres. The Explorer's Way is one of five key touring routes which the SATC is actively marketing, including through joint activity with Tourism NT (Northern Territory). This means the town of Coober Pedy must make a concerted effort to articulate and promote its tourism offer as part of this wider drive tourism region.

While Coober Pedy relies on tourism as a pillar of the local economy, TRA data shows that the town has only 40 'tourism businesses' with many other businesses feeding off the economic activity generated by Coober Pedy's tourism industry. As shown in the economic stocks and flows analysis in Chapter 2 of this report, the tourism industry is an amalgam of activities across various sectors and for each dollar spent by a tourist in Coober Pedy, \$0.78 is spent on Accommodation and Food Services, \$0.15 on Ownership of Dwellings, \$0.04 on Retail Trade and \$0.02 on Administrative and Support Services.

New tourism products and attractions are being developed in Coober Pedy such as the Big Winch sound and light show, and local tourism operators should continue to be encouraged to develop their products through diversification to enhance Coober Pedy's visitor experience and to extend the tourist season beyond the winter months. Opportunities to develop and diversify Coober Pedy's tourism offer include: promoting longer breaks in Coober Pedy as part of a regional outback drive tourism package; small conferences/seminars; establishment of a gallery to showcase local Indigenous art; development of an opal mine walking experience; outdoor activities such

as recreational target-shooting, golf and gliding; nature-based tourism such as bird watching and star-gazing; and Indigenous interpretation.

Through the Coober Pedy Retail, Business and Tourism Association, efforts have been made to establish a 'brand position' to better promote Coober Pedy as a visitor destination. As well as the "Opal Capital" tagline, the "*Coober Pedy Get Outback...Get Underground*" branding is a potentially powerful statement of what Coober Pedy has to offer both domestic and international visitors across a diversity of attractions. If collaboratively promoted and managed with the support of local business operators across all sectors in support of Coober Pedy's visitor economy, this could entice visitors to plan to stop and stay in town for longer as part of their outback holiday experience. To be effective, local businesses will need to collectively buy-in to this new branding and they will need to employ their own digital presence in order to attract people to come and stay in Coober Pedy for longer.

Co-ordination of Tourism Information, Business Support and Visitor Engagement

Coober Pedy receives regular media coverage and there have been some notable television programs shot in the area. However, despite the success of the Coober Pedy Retail, Business and Tourism Association in promoting the 'Coober Pedy' brand, regional tourism promotion is under-developed due to a lack of regional collaboration and co-ordination.

Examples cited include a lack of digital presence of destinations and operators (including social media), limited Coober Pedy-specific tourism market research, and inadequate Wi-Fi services and only limited coordination and promotion. It is reported that not all business operators and industry stakeholders are involved in collaborative efforts to grow Coober Pedy's tourism market to the full extent that is possible. Better resourcing local tourism promotion and destination management and providing visitors and local businesses with a single point of contact to co-ordinate tourism promotion and information support would assist the industry.

Coober Pedy's Visitor Information Centre (VIC), which is located in the Council building, is staffed by Council employees but the town does not have a dedicated tourism development officer to research and manage information on the local visitor economy and to co-ordinate activities to promote Coober Pedy as a visitor destination. If opportunities for tourism promotion, product development and destination management are addressed and resourced, Coober Pedy's visitor economy is poised to further develop its profile and contribution as a pillar of the region's future prosperity.

Actions

Recommended actions are as follows:

- 1.1 Key stakeholders - Coober Pedy Retail, Business and Tourism Association, South Australian Tourism Commission (SATC), Flinders Ranges and Outback South Australia Tourism (FROSAT), Tourism Central Australia (TCA), tourism operators and other local businesses - to work collaboratively to develop and promote short-stay tourism packages that highlight Coober Pedy as a major stop-over between Adelaide and Darwin on The Explorers Way. Specifically target domestic visitors from Queensland and international visitors from Europe, the UK and North America to stop and stay in Coober Pedy for five nights or more.
- 1.2 Prepare a business case (economic and community benefits analysis) for upgrading (sealing) the road linking the Stuart Highway and the Kanku Breakaways Conservation Park.
- 1.3 Work with the Kanku-Breakaways Conservation Park Co-management Board to prioritise project opportunities (e.g. entry statements, signage, interpretation, infrastructure, etc.) to allow more visitors to

Coober Pedy to experience the Kanku in line with the Kanku-Breakaways Conservation Park Management Plan.

- 1.4 Undertake preliminary investigations into opportunities to improve Ghan connections into Coober Pedy. This would include an upgrade to the road link from Manguri to Coober Pedy to address issues of flooding and options to bring the rail head (train station) directly into Coober Pedy.
- 1.5 Prepare a wayfinding strategy for Coober Pedy as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.
- 1.6 Develop a Coober Pedy and Outback Indigenous cultural tourism strategy incorporating the Kanku Breakaways Conservation Park and other product/experience linkages throughout Coober Pedy and the wider region.
- 1.7 Develop a social media tourism promotion strategy for Coober Pedy that leverages the South Australian Tourism Commission's digital strategy and which leverages Coober Pedy's profile as a location for shooting film and television.
- 1.8 Design and implement a Coober Pedy post-experience visitor survey program to improve awareness and understanding of visitor experiences and needs and to better target marketing resources.

Performance Measures

- Increase in the number of tourists taking self-drive journeys through Coober Pedy.
- Increased average length of stay for domestic visitors to Coober Pedy from 3 nights to 6 nights.
- Increased average length of stay for international visitors to Coober Pedy from 2 nights to 5 nights.
- Steady growth in the tourism sector's contribution to Coober Pedy's gross regional product (GRP) and employment over the next five years.

3.2 Support Growth and Development of Mining and Mining Services

Challenges and Opportunities for Growth and Investment

Mining is a driver of the South Australian economy, and most of the State's major mining and gas operations and its priority mineral exploration areas are located in the Far North Region. Mining activity in and around Coober Pedy is split between non-metallic minerals mining (opals), non-ferrous metal ore mining (copper, gold, silver and other metals), iron ore mining as well as oil and gas extraction and some coal mining.

According to IBISWorld (October 2018), production capacity expansions for a range of mineral commodities will be key for ongoing mining industry growth in Australia over the next five years. Greater output and continued export increases are projected to support revenue growth over the five-year period. Mining industry revenue is forecast to grow at an annualised 1.0% over the five years through 2023-24, to reach \$241.3 billion.

As illustrated in Section 2 of this report, the mining industry accounts for one-quarter (24.5%) of Coober Pedy's economic output, 21% of industry value-added and 47% of exports, with non-ferrous metal ore mining accounting for the largest share of resource sector activity in the area (gold, copper, silver and other metals). Mining also provides for a large share of jobs located in Coober Pedy, accounting for 9% of total employment. However, as the majority of South Australia's mining activity takes place in the Far North Region, where the industry accounts for more than one-quarter of all jobs, mining's contribution to employment in Coober Pedy is relatively modest by regional standards.

Continued Development of Opal Mining in Coober Pedy

Coober Pedy, which is one of Australia's four established opal mining districts, along with Andamooka in the Far North Region and White Cliffs and Lightning Ridge in New South Wales, is the largest opal mining district in the world. As such, opal mining is synonymous with Coober Pedy, which is widely regarded as the opal capital of the world. Australia mines most of the world's opals that are used in jewellery manufacturing. The industry's opal miners sell and export rough, cut and polished opals, and rely heavily on downstream demand from jewellery manufacturers and jewellery sales.

Entry barriers are relatively low for opal mining compared to other mining activities, as the productive fields are more accessible and more amenable to mining via relatively simple methods. Nevertheless, exploration costs can be high, and miners require government approval to carry out mining operations on Aboriginal land. Approval for opal mining and prospecting in South Australia is regulated by the *Opal Mining Act 1995* and the *Opal Mining Regulations 2012*. Several Native Title agreements are also applicable to designated areas that allow miners to enter and mine particular sites. Miners must adhere to conditions that protect traditional sites and ensure the full rehabilitation of any land that is mined.

Opal mining is typically labour-intensive, though substantial capital is still required to establish operations. Most opal mines are small, where individuals and small-scale firms use basic extraction techniques. The industry's prospects for growth are positive, not only through opportunities generated by opal mining's relationship with the local visitor economy but also for the opportunities it offers new entrants to establish and grow opal mining in Coober Pedy.

Continued interest in opal mining together with existing and emerging operations in copper, silver, gold and iron ore magnetite in the surrounding area presents opportunities for mining industry employment creation and associated mining services activities. The Far North's major mining operations includes Prominent Hill, a copper-gold mining operation located approximately 130 kilometres south-east of Coober Pedy that is owned by OZ

Minerals. Prominent Hill first came on stream in 2009 and now produces over 100,000 tonnes of copper every year. The operation is a fly-in fly-out site that employs approximately 900 employees and contractors.

Mining in the Far North Region benefitted from unprecedented resource sector growth experienced in Australia over the ten years to 2015/16, with the rapid industrialisation of China and India driving demand for natural resources and industrial commodities. As global demand surged, many Australian mining companies, including those operating in the Far North, committed to new projects, resulting in a swell of capital investment and mining volumes. This flow of investment worked its way down the supply chain, through the exploration and mining services industries, and increased mining output.

While the global resources sector slowdown resulted in a reduction and cessation of some mining activity, a positive global outlook for at least the next five years is seeing a resurgence in mine expansions in the Far North, with prospects for increased production and associated employment now evident.

Local Supply and Employment Opportunities

Despite the mining industry's contribution to local employment being modest by (Far North) regional standards, plans for the establishment and expansion of mining operations in the region bode well for local mining services businesses and for local employment creation. For example, Cu-River Mining, is planning for a significant expansion that will see 3 million tonnes of magnetite concentrate mined in the region each year. Cu-River also has a strong project pipeline and an ambitious growth strategy that will see it headquartered in South Australia for decades to come.

Cu-River plans to be a major producer of iron ore magnetite, in line with the South Australia's Magnetite Strategy which targets the production of 50 million tonnes of iron ore magnetite per year by 2030. It holds four exploration licences covering approximately 3,000 square kilometres in broadly the same vicinity as Cairn Hill. Once these resources are brought into production, the company's goal is to produce 15 million tonnes of magnetite concentrate annually. This will make Cu-River the largest iron ore producer in South Australia and potentially create hundreds of employment opportunities.

Cairn Hill is currently in a production pause while final regulatory approvals for expansion are sought from both the State and Federal governments. Following these approvals, Cu-River's planned infrastructure improvements, including a wet processing plant and power station, will proceed. In the lead-up to and during the operations phase of major mining projects including Cairn Hill and others, employment and supply chain opportunities may exist for Coober Pedy businesses and workers. Opportunities might include, for example, the provision of mining services such as light civil engineering services, maintenance and repairs, as well as materials supply, catering and land management advice. Opportunities may differ between the construction and operations phases of a major project, as supply chain requirements are different in these two periods.

Planning for New Projects - Accommodation and Workforce Planning

RDA Far North and the District Council of Coober Pedy will need to continue working with mining companies and other stakeholders to prepare and plan for new resource projects and expansions of existing operations where activities are likely to have significant impacts on the community. Key potential points of impact or opportunity include the need for workforce planning / skills training and worker accommodation strategies.

Resource companies begin workforce planning for construction and operations phases early in the project planning stage, and this in turn informs the accommodation strategies for these respective workforces. This presents an opportunity to facilitate timely joint planning between the Coober Pedy community, the District Council of Coober Pedy and mining companies and to utilise the expansion planning process to ensure that all members of the

community are fully informed of potential benefits and dis-benefits of different workforce and accommodation models and to have informed input into the planning process.

The project planning stage also allows for the necessary lead time that is critical to infrastructure planning and for early exploration of infrastructure funding models, including negotiations for shared investments. This applies to local community infrastructure and related activities such as community festivals and events as well as physical infrastructure such as energy, communications and transport (e.g. the Adelaide to Darwin rail line), which is essential to enable mining and associated economic activity to connect efficiently and effectively with export markets.

Planning should address the capacity of Coober Pedy's (and the region's) education and training infrastructure and services to ensure the potential for expanded mining-related business activity and employment in Coober Pedy is not stifled by a shortfall in local skills. To facilitate investment in Coober Pedy and the region, the 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.

Workforce planning will need to assess and evaluate future workforce training infrastructure needs and consider these against the current capacity and plans for the closure of TAFE SA's Coober Pedy campus. A sustainable mining future in Coober Pedy and the wider region will be reliant on the development of local tertiary education and training pathways for secondary school students. RDA Far North, mining companies, the District Council of Coober Pedy as well as education and training providers all have a collaborative role to play in this regard.

Actions

Recommended actions are as follows:

- 2.1 Facilitate working relationships with mining companies and Coober Pedy community stakeholders throughout the mining lifecycle to encourage a sustainable future for mining in Coober Pedy and the surrounding region.
- 2.2 Investigate means for informing a policy position on support for local procurement targets within Coober Pedy's mining sector. Engage with local mining services companies and the mining companies operating in Coober Pedy and the region to develop a local procurement policy with support from all stakeholders.
- 2.3 Work with mining companies regarding current expansion and development projects to gain an understanding of workforce requirements; map skills requirements against existing training available in Coober Pedy and identify potential training programs to support local employment opportunities.
- 2.4 Work with mining companies, the Coober Pedy Area School and TAFE SA to explore opportunities for school-based apprenticeships and traineeships associated with planned mining activity in the region.
- 2.5 Work with the Antakirinja Matu-Yankuntjatjara Aboriginal Corporation (AMYAC), mining companies and other key stakeholders to establish and deliver Indigenous employment pathways in the local mining sector. This may include training, mentoring and workplace opportunities.
- 2.6 Collaborate with mining companies to develop a sustainable mining workforce accommodation strategy for Coober Pedy.

Performance Measures

- A Local Content Plan (procurement, employment and training) developed within 6 months to support plans for continued and expanded mining activity in the Coober Pedy area.
- Steady growth in the mining sector's contribution to Coober Pedy's gross regional product (GRP) over the next three years.
- An increase in expenditure by mining companies operating in the Coober Pedy area over the next three years.
- An increase in the number of mining workers and families living in Coober Pedy and working in the surrounding area over the next three years.
- A sustained increase in the permanent population of the Coober Pedy township over the next three years.
- An increase in the offering and uptake of school-based apprenticeships and traineeships associated with local mining activity over the next three years.

3.3 Promote Coober Pedy as a Location for Working, Learning and Outback Living

Challenges and Opportunities for Growth and Investment

Planning for Business Investment and Sustainable Population Growth

The Far North Region Plan (2010) designates Coober Pedy a key service centre for Outback South Australia, with essential services including medical, health, welfare, law and order, education and leisure. Despite this, Coober Pedy itself currently lacks a strategic plan which sets out the town's vision and values or a clear spatial framework to guide planning and actions to inform public and private sector investment. This is essential if Coober Pedy is to maintain its important commercial and service centre role for its sub-region.

As documented in Chapter 2 of this report, Coober Pedy has an estimated resident population of 1,837. However, the itinerant and 'part-time' nature of a large number of people who call Coober Pedy home, at least for part of the year, means that at times the local population can be as high as around 3,500. Coober Pedy's population has declined steadily since 2001, however in more recent years (since 2012), it has shown a gradual increase, from 1,787 in 2012 to 1,837 in 2017, representing an average annual increase of 0.6 per cent.

To attract new residents, new businesses and new investment, Coober Pedy needs to articulate its value proposition. Investment attraction (and people attraction) requires a strategic and targeted approach to appeal to business owners and, perhaps more importantly, their families to consider living and working in Coober Pedy. Attracting new people and new businesses to Coober Pedy requires Council to take the lead, with support from RDA Far North and industry, in pro-actively seeking out new investment opportunities and to facilitate change through its town planning functions and the delivery of critical infrastructure.

Information and Communications Technology and Economic Development

Quality connections to information and communications technology (ICT) networks are an important enabler of economic and community development. The emergence of the digital economy has increased the propensity for individuals and businesses to use information and communications technologies to interact and trade with suppliers, partners and customers anywhere in the world. Broadband has become a fundamental enabler of regional economic development. Given Coober Pedy's remoteness, accessibility to ICT is critical.

Broadband NBN infrastructure is available in Coober Pedy, facilitating the capacity of local businesses and individuals to interact with the global economy. For local businesses to remain competitive and for the communities of the region to remain connected, businesses and residents need to take advantage of this infrastructure. Ensuring the community is informed of the benefits of having NBN connectivity will enable more people and more businesses to connect and interact with the national and global economies.

Community Infrastructure, Urban Amenity and the Importance of Place

'Community' infrastructure includes important services and facilities like health care, social assistance and education services as well as recreation, leisure and entertainment services and facilities. It also includes what can best be described as a sense of place, which is defined at a functional level by the community's social connectedness and physically, in part at least, by its urban form, function and amenity.

The District Council of Coober Pedy has a clear role to play in providing a sense of place through its strategic land use planning functions. It can also work with other stakeholders in government and industry (such as the region's mining companies) to encourage investment in and maintenance of key urban facilities including the town's community, lifestyle and recreation assets such as parks and gardens, sporting ovals, recreational walkways and

community meeting places. This requires the resolution of some key infrastructure issues, namely investment in the town's capacity to use reclaimed water (water recycling) for greening and growing the town's amenity and sense of place and preserving drinking water for its intended use.

The District Council of Coober Pedy also has a key role to play in promoting business investment and local economic development. As well as providing information and support for new and existing business and preparing information and material to help promote and attract business investment to Coober Pedy, a lot of what Council can do to facilitate sustainable economic development outcomes is place-based, with a focus on the physical enablers of growth (i.e. infrastructure) and the land use planning frameworks and regulations which guide business development. Hence, urban planning and place-making are both fundamental components of a Council's role in economic development.

Health Care and Social Assistance

If Coober Pedy's permanent population and its workforce is to grow, this will present both challenges and opportunities for regional economic development, particularly in areas such as health care and education. The health care and social assistance sector employs more people than any other industry in Coober Pedy, accounting for almost 20% of local jobs.

Other key service sectors which employ a large share of the local workforce include the education sector and the public service. As well as being drivers of economic activity in their own right, Coober Pedy's health and education sectors are important enablers of economic development as they are essential for facilitating community wellbeing and the productive capacity of the local workforce.

Coober Pedy's population is ageing which is placing pressure on the local health care system. At present Coober Pedy has no facility dedicated to aged care. The town also lacks specialist facilities such as kidney dialysis units meaning residents in need of specialist health care must travel to Alice Springs or Adelaide for example to seek treatment. As well as effectively forcing some people to travel or live elsewhere to access the services they need, a lack of adequate health and education services and facilities also deters potential residents from investing in Coober Pedy.

Education and Training and Workforce Development

To attract and retain investment in Coober Pedy, availability of suitable workforce skills is paramount. As noted earlier in this report, 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.

As shown in Chapter 2 of this report, Coober Pedy's unemployment rate of 11.3% is notably higher than the unemployment rates for regional South Australia and the State as a whole and the national average. Reinforcing the enabling role of education in underpinning a region's stock of human capital (skills), economists have noted the high correlation between regional economic growth and higher educational attainment, and the role of education, along with enterprise and employment, as a key lever for economic development.

Regions are successful because enterprises in those regions are successful. When enterprises grow, employment grows, and this depends on skilled and educated people. Policies to support enterprises, employment and education that work together create dynamic regions. This reinforces the importance of education infrastructure that can facilitate training and employment pathways for Coober Pedy's youth. In Coober Pedy, there is an opportunity to engage with educators, training providers and industry to meet the challenge of equipping the local

workforce to address the skills gaps that will emerge through the impending global wave of digitisation, automation and the use of new technologies.

Actions

- 3.1 Review and update the District Council of Coober Pedy's Development Plan and its Strategic Plan to articulate an updated vision, values, planning principles and priorities as part of a broader Far North regional planning framework.
- 3.2 Consistent with the outcomes of the updated Development Plan and Strategic Plan, collaborate with government, non-government and industry stakeholders to prioritise investments in the development and maintenance of Coober Pedy's community, lifestyle and recreation assets.
- 3.3 Investigate the feasibility of investing in water recycling infrastructure to use wastewater for irrigating the town's green spaces including its parks and gardens, streetscapes and the sports oval.
- 3.4 Prepare a Coober Pedy District Council Economic Development Plan which clearly articulates Council's economic development roles and functions and its priority economic development facilitation and promotion activities.
- 3.5 Collaborate with the Coober Pedy Retail, Business and Tourism Association to commission the design and development of a web-based Coober Pedy investor prospectus targeting businesses and occupations in Coober Pedy's key industries of mining and mining services, tourism, health and education.

Performance Measures

- Relevant land use and strategic planning documents updated to reflect the revised vision within 18 months.
- A local (Coober Pedy) Economic Development Plan prepared within 18 months.
- A sustained increase in Coober Pedy's permanent population over the next five years.

4. Economic Growth and Investment Strategy Work Plan



4. Economic Growth and Investment Strategy Work Plan

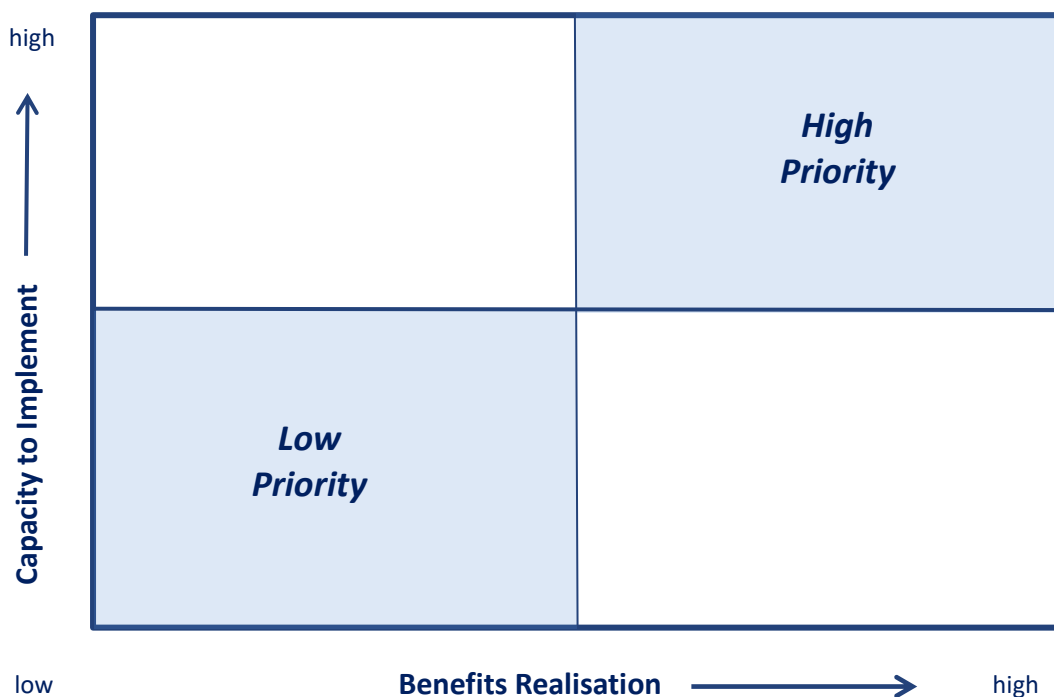
4.1 Assessing and Prioritising Actions

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 Regional Development Australia Far North and the District Council of Cooper Pedy 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 – *benefits realisation* 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 Coober Pedy's existing business and employment profile, capabilities and comparative advantages?
2. Does the opportunity demonstrate the potential to support endogenous growth factors (e.g. increase in the number of viable local businesses, jobs and expenditure in the Coober Pedy township and surrounds)?
3. Is the opportunity likely to help create more jobs in Coober Pedy's key industries of tourism, health, mining and mining services and construction?
4. Is there a ready market for the opportunity's product or service?

Capacity to Implement

1. Does Coober Pedy 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 stakeholders including local residents, business owners and Traditional Owners?

Organisational Fit / Role

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

Other Considerations

Environmental Benefits

Does the opportunity create environmental benefits through:

1. Reducing greenhouse gas emissions by adopting 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 liveability.

Social Benefits

Does the opportunity create 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. Improving the 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 12 to 18 months. The assessment outcomes are shown in the table below.

Figure 12. Summary of Action Assessment Outcomes

Action	Benefit Realisation	Capacity to Implement	Overall Assessment
<i>Support the Development of Coober Pedy's Visitor Economy</i>			
1.1 Key stakeholders - Coober Pedy Retail, Business and Tourism Association, South Australian Tourism Commission (SATC), Flinders Ranges and Outback South Australia Tourism (FROSAT), Tourism Central Australia (TCA), tourism operators and other local businesses - to work collaboratively to develop and promote short-stay tourism packages that highlight Coober Pedy as a major stop-over between Adelaide and Darwin on The Explorers Way. Specifically target domestic visitors from Queensland and international visitors from Europe, the UK and North America to stop and stay in Coober Pedy for five nights or more.	High	High	High
1.2 Prepare a business case (economic and community benefits analysis) for upgrading (sealing) the road linking the Stuart Highway and the Kanku Breakaways Conservation Park.	High	Medium/High	High
1.3 Work with the Kanku-Breakaways Conservation Park Co-management Board to prioritise project opportunities (e.g. entry statements, signage, interpretation, infrastructure, etc.) to allow more visitors to Coober Pedy to experience the Kanku in line with the Kanku-Breakaways Conservation Park Management Plan.	High	Medium	Medium/High
1.4 Undertake preliminary investigations into opportunities to improve Ghan connections into Coober Pedy. This would include an upgrade to the road link from Manguri to Coober Pedy to address issues of flooding and options to bring the rail head (train station) directly into Coober Pedy.	Medium	Medium	Medium
1.5 Prepare a wayfinding strategy for Coober Pedy as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.	High	Medium	Medium/High
1.6 Develop a Coober Pedy and Outback Indigenous cultural tourism strategy incorporating the Kanku Breakaways Conservation Park and other product/experience linkages throughout Coober Pedy and the wider region.	High	Medium	Medium/High
1.7 Develop a social media tourism promotion strategy for Coober Pedy that leverages the South Australian Tourism Commission's digital strategy and which leverages Coober Pedy's profile as a location for shooting film and television.	Medium	Medium	Medium
1.8 Design and implement a Coober Pedy post-experience visitor survey program to improve awareness and understanding of visitor experiences and needs and to better target marketing resources.	Medium	Medium	Medium

Action	Benefit Realisation	Capacity to Implement	Overall Assessment
Support Growth and Development of Mining and Mining Services			
2.1 Facilitate working relationships with mining companies and Coober Pedy community stakeholders throughout the mining lifecycle to encourage a sustainable future for mining in Coober Pedy and the surrounding region.	High	Medium	Medium/High
2.2 Investigate means for informing a policy position on support for local procurement targets within Coober Pedy's mining sector. Engage with local mining services companies and the mining companies operating in Coober Pedy and the region to develop a local procurement policy with support from all stakeholders.	High	Medium	Medium/High
2.3 Work with mining companies regarding current expansion and development projects to gain an understanding of workforce requirements; map skills requirements against existing training available in Coober Pedy and identify potential training programs to support local employment opportunities.	High	High	High
2.4 Work with mining companies, the Coober Pedy Area School and TAFE SA to explore opportunities for school-based apprenticeships and traineeships associated with planned mining activity in the region.	High	Low	Medium
2.5 Work with the Antakirinja Matu-Yankunytjatjara Aboriginal Corporation (AMYAC), mining companies and other key stakeholders to establish and deliver Indigenous employment pathways in the local mining sector. This may include training, mentoring and workplace opportunities.	High	Medium	Medium/High
2.6 Collaborate with mining companies to develop a sustainable mining workforce accommodation strategy for Coober Pedy.	High	High	High
Promote Coober Pedy as a Location for Working, Learning and Outback Living			
3.1 Review and update the District Council of Coober Pedy's Development Plan and its Strategic Plan to articulate an updated vision, values, planning principles and priorities as part of a broader Far North regional planning framework.	High	High	High
3.2 Consistent with the outcomes of the updated Development Plan and Strategic Plan, collaborate with government, non-government and industry stakeholders to prioritise investments in the development and maintenance of Coober Pedy's community, lifestyle and recreation assets.	High	Medium	Medium/High
3.3 Investigate the feasibility of investing in water recycling infrastructure to use wastewater for irrigating the town's green spaces including its parks and gardens, streetscapes and the sports oval.	Medium	Medium	Medium
3.4 Prepare a Coober Pedy District Council Economic Development Plan which clearly articulates Council's economic development roles and functions and its priority economic development facilitation and promotion activities.	High	Medium	Medium/High
3.5 Collaborate with the Coober Pedy Retail, Business and Tourism Association to commission the design and development of a web-based Coober Pedy investor prospectus targeting businesses and occupations in Coober Pedy's key industries of mining and mining services, tourism, health and education.	Medium	Medium	Medium

Source: SC Lennon & Associates

4.2 Priorities for Action – Informing a Short-term Work Plan

As noted above, resource constraints will make it impossible for RDA Far North, the District Council of Coober Pedy and their partners to act on all issues and opportunities immediately. Priority projects and activities for implementation as part of a 12 to 18-month 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 District Council of Coober Pedy should advance (in association with identified partners where relevant) as short-term priorities.

The priorities are:

1. Key stakeholders - Coober Pedy Retail, Business and Tourism Association, South Australian Tourism Commission (SATC), Flinders Ranges and Outback South Australia Tourism (FROSAT), Tourism Central Australia (TCA), tourism operators and other local businesses - to work collaboratively to develop and promote short-stay tourism packages that highlight Coober Pedy as a major stop-over between Adelaide and Darwin on The Explorers Way. Specifically target domestic visitors from Queensland and international visitors from Europe, the UK and North America to stop and stay in Coober Pedy for five nights or more.
2. Prepare a business case (economic and community benefits analysis) for upgrading (sealing) the road linking the Stuart Highway and the Kanku Breakaways Conservation Park.
3. Work with mining companies regarding current expansion and development projects to gain an understanding of workforce requirements; map skills requirements against existing training available in Coober Pedy and identify potential training programs to support local employment opportunities.
4. Collaborate with mining companies to develop a sustainable mining workforce accommodation strategy for Coober Pedy.
5. Review and update the District Council of Coober Pedy's Development Plan and its Strategic Plan to articulate an updated vision, values, planning principles and priorities as part of a broader Far North regional planning framework.

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

4.3 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 Coober Pedy. 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 local businesses and the wider community.

While RDA Far North and the District Council of Coober Pedy 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 therefore, requires both leadership and the formation of partnerships.

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, Traditional Owners, the Coober Pedy Retail, Business and Tourism Association, mining companies, non-government organisations and other community groups. SAAL NRM 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 natural environment and Coober Pedy's culture, history, economy and society, coupled with the cross-over of objectives between RDA Far North, the District Council of Coober Pedy and SAAL NRM, highlights the importance of these 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 organisations.

Using this Economic Growth and Investment Strategy as a plan of action, RDA Far North and the District Council of Coober Pedy 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, tourism, economic development and community wellbeing.

The Economic Growth and Investment Strategy guides the efforts of RDA Far North and the District Council of Coober Pedy, working together and with others, to facilitate opportunities for investment to support Coober Pedy'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 Coober Pedy's engagement with both State and Federal Governments on matters of significance.

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