Survey of non resident and resident ratepayers of the District Council of the Copper Coast, January 2012

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EXECUTIVE SUMMARY

In October 2011 the District Council of the Copper Coast sought the assistance of GISCA, and principally its Director Professor Graeme Hugo, to undertake work which would result in the production of a demographic profile of the Copper Coast. The main component of the proposed work was a survey of both resident and non resident ratepayers. In addition to this aspect, it was also proposed to include some comparative demographic data derived from the 2006 census, as well as a discussion on future population trends based on current population projections available for the district, and a relatively brief discussion on how internal migration between 2001 and 2006 had impacted on the district.

The two surveys were undertaken between 16 January and 17 February 2012, and the data were analysed, and this Report prepared, at GISCA within the University of Adelaide.

The bulk of the Report centres on an analysis of the two surveys undertaken. Chapter 1 is an analysis of the non resident ratepayer survey, which has embedded in it a discussion of population projections for the area, as well as an analysis of the main features of internal migration as it relates to the Copper Coast.

Chapter 2 analyses the results from the ratepayer survey. The survey has collected considerable demographic data related to the ratepayer population, and where possible the demographic features of the survey population have been compared with those for the total population related to data derived from the 2006 census.

This summary of the Report is in two parts – the first presenting a summary of the main findings of the non resident survey, and the seconding presenting the main findings from the survey of ratepayer residents.

The non resident ratepayer survey

The overwhelming majority of non residents (88.6) percent) owned just one property in the Copper Coast, and most of their buying activity has occurred since 2000.

Non residents have a clear preference for properties with a coastal location, and this is a function of the main reasons given by non residents for purchase in the Copper Coast – lifestyle, retirement and coastal amenity.

A substantial proportion of non resident owners have plans to upgrade their property, which has implications for the capital value of the housing stock within the district.

A third of non residents have plans to move permanently to the Copper Coast. This decision will have significant implications in terms of extra persons in the District, as well as for the age structure, the level of income available for spending and the number of persons available for voluntary involvement in the community.

The survey indicated that the impact on schooling facilities is likely to be less than that generated by the permanent population in the area.

Apart from the impact non-residents will have on future population levels through in-migration, there is a significant population impact generated by their time-to-time use of their Copper Coast property. The data suggest that non residents have an additive impact on population representing some 6.8 percent of the 2006 population for the district recorded at the 2006 census. A fifth of non residents' properties are rented out long term, and persons living in these dwellings are probably counted in the census. However, 17.5 percent rented out their property on an occasional basis, and it is likely that the people living in these will add to the 6.8 percent of "uncounted" population of the district.

A number of demographic characteristics of the non resident group were survey. More than a third comprised couples without children, but 44 percent of households comprised couples

with children. It's arguable that this in itself represents a motivation for buying a holiday property. Nearly 46 percent of non residents are in the pre-retirement age group of 45-64 years, and it is these people who, in large part, indicated that they would make the move to the Copper Coast at sometime in the future. When they do this, therefore, they will add to the ageing of the *in situ* population of the Copper Coast. Of households expecting to move to the District within the next two years, 85 percent will be one and two person households.

Presently, nearly 62 percent of non residents are employed, either full time or part time, with a further 28 percent retired or not in the labour force. It is significant that this group is highly represented in the higher status, and generally higher paid, occupations.

Non residents make substantial contributions to the local economy when in the Copper Coast. Only one percent of non residents purchase all their food requirements at home and prior to making the trip to the Copper Coast, and only 7.4 percent buy most of their food supplies at home. Visitors neither "overdo" nor "never" eat out at takeaway outlets and restaurants when in the Copper Coast, but do have a preference for restaurants for "special occasions" compared with takeaway food outlets.

While in the Copper Coast, non resident visitors are quite prepared to use local medical and hospital services. From a service provision perspective, these results have implications for demand, especially at peak visitor times, such as Easter, school holidays and the Christmas period.

Non residents have their holiday homes in the Copper Coast because of its greatest assets – its coast and beaches, the quiet and peaceful lifestyle it offers, the fishing and its closeness to Adelaide. However, they do have some gripes about the area mainly revolving around roads, maintenance of parks and gardens and footpaths, issues with council, boat ramps and rubbish disposal and sewerage connections.

The resident ratepayer survey

Within the District Council of Copper Coast, more than 96 percent of ratepayers own their home, with more than 84 percent of these having three or more bedrooms. Just on three quarters of ratepayers own their home outright.

A quarter of residents have always lived in the District, and of the remainder, more than half are relatively new to the area, having moved into the Copper Coast since 2000.

Once in the district, households do not necessarily remain at the same location from thereon. The survey has shown that the longer a household has been in the district, the less likely they are to be currently in their original dwelling. For example, only 16.3 percent of pre 1960 households remain in their current dwelling, but 63.6 percent of households arriving in the period 1990-1999 remain in their original dwelling. It means that in the Copper Coast, as in most other locations, households generate a housing career, as they move from one dwelling to another usually in response to changed household circumstances, such as size of family, adjustment occasioned by the ageing process, downsizing and/or release of equity from their home to finance other priorities.

The distribution of residents prior to their moving to the Copper Coast is not unlike the location of non resident ratepayers. Most came from within South Australia, with large numbers previously living relatively close to the Copper Coast, be it in the Yorke Peninsula region, the mid North, or the towns of the iron triangle.

There are four main reasons why permanent residents moved to the Cooper Coast. Lifestyle and environment was the most significant reasons, with employment or business reasons ranked next. Retirement and family reasons rounded off the main reasons for moving to the

Copper Coast. Financial and investment reasons were not as prominent as they were for non resident ratepayers.

Couple households are predominant among ratepayers, and within this group couples without children are more prevalent than those with children. When lone person households are considered, more than three quarters of resident ratepayer households comprise families without children. Single parent and lone person households are underrepresented in the survey because many of these households are likely to be renters and accordingly not included in the survey. The extent of differences between the survey population and the total population due to the district's population living in rented accommodation can often be gauged by comparative tables derived from the 2006 census of population and housing, which have been presented as part of the documentation for this chapter.

The balance between males and females in the survey population is close, with females slightly outnumbering males. This is to be expected in rural populations which have relatively high numbers of persons in the pre-retirement, young-old and old-old age groups. Accordingly, the age sex structure of the ratepayer population is relatively "top heavy", with age cohorts beyond 44 years being significantly larger than those younger than 45 years. In the total population, some of these differences are reduced, so that there are greater proportions of people in the younger age groups and lesser proportions in the older age groups.

There is a clear relationship between household size and the representation of age groups within them. Generally, the larger households are comprised of younger people than smaller households.

In terms of employment status, the largest category is the Retired (or mostly retired) group, representing nearly 40 percent of all respondents. This is a little under double the proportion of retired persons in the non resident sample. This is a group which will make demands on specific types of services and infrastructure, and which has implications for a range of policy responses by local government. Persons employed either full time or part time represent 36 percent of the ratepayer population. In the non resident ratepayer group, employed persons were 44.5 percent of the total. The difference points to a prevailing issue occurring in most regional localities – that of securing increased employment opportunities for the resident population. Initiatives which could attract extra opportunities to region would have significant impacts on the proportion of employed persons as well as the size of the population, as it would work to attract additional people into the area.

A significant demographic category within any population is its occupation structure, as this is linked to socio-economic status. In comparing the survey data with data from the 2006 census, several contrasting points can be made:

- Managerial, Technical and trades and clerical and administrative occupations have higher occurrences in the surveyed population than in the total population.
- Professional and community and personal services occupations are essentially equally represented in both groups.
- The remaining occupational categories, and generally lower paid and lower socio-economic occupations, are represented to lesser degrees in the surveyed population than in the total population.

Most ratepayers (84 percent) are employed within the Copper Coast. Of these, 44 percent work in Kadina, 18 percent in Wallaroo and 17 percent in Moonta. About seven percent work nearby to the Copper Coast. There is evidence that some of the other workplace locations of the resident population are linked to the mining industry. If this demonstrates a

link between the Copper Coast and the mining industry, then from a policy perspective this is a matter that Council could pursue with the mining companies in terms of housing their fly in-fly out workforce. Clearly, the Copper Coast presently has some attractions to the mining workforce and this attraction could be further promoted to increase the proportion of the mining industry that chooses to reside in the Copper Coast.

The income structure of the resident population is negatively skewed towards the lower income categories, in contrast with that of the non resident population. Based on its ratepayer population, the Copper Coast is not a high income region, which is to be expected given the high levels of older people in the population and the relationship this has with numbers of retired persons and those not in the labour force. Data from the census confirms the negative skewness of income within the total population, but the level of skew is not as pronounced as that within the ratepayer group. Again, this is to be expected because of the inclusion of renters who are more likely to be employed and have higher incomes than those in the survey population.

A key objective of the survey was to assess certain aspects of ratepayer behaviours and preferences. Kadina is clearly the dominant shopping town within the region. Fifty seven percent of residents use Kadina on a weekly basis compared with 40 percent who use Wallaroo and Moonta at the same frequency. Centres beyond the Copper Triangle are rarely used for food and grocery shopping. Residents do not use the main centres for household goods and clothing at the same frequency they use them for food and grocery items – more likely monthly than daily or weekly. The Adelaide CBD is visited for shopping on a monthly basis by a third of residents, and more significantly nearly 50 percent of Copper Coast residents use Adelaide shopping centres on a monthly basis. These centres are most likely those located on the northern fringes of the metropolitan area, such as Elizabeth, Munno Para, Gepps Cross and Tea Tree Plaza, all of which are about an hour by car from the Copper Coast. Travel to Adelaide is a feature of life in the Copper Coast for a large number of residents. While interaction occurs with other nearby towns does occur, it is not at the same intensity as travel between the Copper Coast and Adelaide.

There are two equally dominant reasons for travel to Adelaide – visiting relatives and friends (33.7 percent) and for medical purposes (33.6 percent). The first reason highlights the fact that the Copper Coast comprises a substantial “migrant” population of people who previously lived in Adelaide before moving to the Copper Coast either to retire or to work. The second reason highlights the absence of specialist medical services in rural areas. A third reason also exists – travelling to Adelaide for shopping purposes. Significantly, these three reasons explain why more than 80 percent of Copper Coast residents travel to Adelaide.

The above notwithstanding, there is a sizeable number of services available within the Copper Coast which are presently being used by residents. Some are accessed in greater numbers than others. The activities with lower numbers accessing them are generally more specialist services related to specific health issues. Significantly though, these services are meeting more than 70 percent of respondents’ needs for the significant majority of users.

Takeaway food outlets and restaurants are a feature of most communities. Just over 80 percent of all respondents indicated patronage of both takeaway food outlets and restaurants within the region, at levels ranging from daily to rarely. Some 15 percent of residents patronise takeaway outlets weekly, compared with 11 percent who use restaurant services on a weekly basis. Both meal options have similar patronage for use on a fortnightly and monthly frequency, with higher proportions of residents using them on a monthly basis than on a fortnightly basis. Restaurants are used more for special occasions than are takeaway outlets.

The final part of the survey asked residents to indicate favourable and least favourable aspects of the Copper Coast, as well as to indicate issues that were currently concerning them. Lifestyle and beaches ranked first and second as the most favourable aspects of the Copper Coast. These aspects are the Copper Coast's greatest assets, enjoyed by its residents, making the Copper Coast a place where outsiders purchase holiday homes, with many deciding to make a permanent move to the region, and which cause day tripper tourists to pour into the area, adding much to the local economy.

There are clear implications for the District Council of the Copper Coast in relation to what ratepayers find unfavourable about the District. Many of the comments from residents relate to roads, aspects of Council, and parks and gardens and level of retail services. To enable Council to better understand the impacts and implications of these grievances, the study has cross tabulated their occurrence by the locality from which the grievance emanated. A complementary question asked residents about any local issues that concerned them. The dominant issues relate to roads and footpath maintenance, along with accessibility to council by ratepayers. Other issues of less concern to ratepayers were associated with rubbish, sewerage and stormwater disposal, upgrading of infrastructure in Wallaroo and Moonta, and matters related to country hospitals in general and their staffing levels.

In addition to seeking some reasons why residents move into the Copper Coast, the survey also sought to establish some factors that might cause existing residents to leave the area. The significance of various reasons for leaving the district depended on which person in any household was responding to the question. For example, for Persons 1 and 2 in any household, who were usually the head of household and his/her spouse or partner, death and illness were the main factors that could cause people to leave the district. Less significant reasons related to employment or loss of driver's licence. However, for persons 3, 4 and 5, who were usually other family members, the dominant reasons for leaving the area were employment and study.

In the survey, 44 percent of respondents provided some comments relating to public transport in the Copper Coast. There is a clear concern within the District about accessibility to Adelaide by public transport and the regularity of existing services between the Copper Coast and Adelaide. For a range of reasons this is a problematic issue for local authorities.

CHAPTER 1. COPPER COAST REPORT – SURVEY OF NON RESIDENTS

1.1 INTRODUCTION

Between 16 January and 17 February 2012, the District Council of the Copper Coast undertook a survey of resident ratepayers and non resident ratepayers. Survey forms (see Appendix 1) were sent to 3,099 resident ratepayers and 1,679 non resident ratepayers, representing a 75 percent sample of each constituency. The overall response rate to the survey was 37.3 percent (1783 returns). The response rate for resident ratepayers was 38.1 percent and for non residents 35.9 percent. The population represented in the survey forms returned by resident ratepayers was 2,252, which represented 17 percent of the District's estimated resident population at 30 June 2010.

Residents and non residents were asked a series of different questions, as well as a number of similar questions. The results from the Non resident survey are presented in this chapter, with the next chapter detailing the results of the Residents survey. The first part describes selected characteristics of the property non residents own in the Copper Coast, while the emphasis in the second part is one how this property is used. In the third section the emphasis is on defining selected demographic characteristics of the non resident ratepayer population. Finally, the Report details their responses to a range a questions mainly revolving around behaviour, consumption and responses to a range of issues within the district.

1.2 NON RESIDENT SURVEY

The analysis of the non resident ratepayers' responses is broken down into a number of segments. The first details a number of aspects of their Copper Coast property, ranging from its location and reasons for its purchase, to dwelling and tenure characteristics, plans to upgrade and any intentions to move permanently to the Copper Coast. The second part of the analysis examines aspects of how often the property is used and whether it is rented out at any time. The third stage examines some key demographic characteristics of the non resident population, as well as identifying some of their behavioural characteristics in terms of use of services whilst in the Copper Coast. Finally, the discussion turns to what the non residents like and dislike about the Copper Coast and any issues that are presently concerning them about the Copper Coast.

1.2.1 Non residents' property characteristics

Within the non resident cohort, the overwhelming majority (88.6 percent) owned just one property in the Copper Coast. Non residents who owned more than one property were asked to complete the questionnaire in relation to the property in the Copper Coast they used the most. Table 1.1 shows the distribution of non resident ratepayer properties within the District. The clearest point emerging from this table is the preference non resident ratepayers have for coastal settings within the District, with 87.6 percent of properties located in Moonta Bay, Wallaroo, North Beach, Port Hughes and Moonta. A further 4.4 percent were located in Wallaroo Marina.

Table 1.1: Distribution of non resident properties

Suburb/Town	Number	Percent
Moonta Bay	198	33.7
Wallaroo	117	19.9
North Beach Wallaroo	88	15.0
Port Hughes	65	11.1
Moonta	47	8.0
Kadina	34	5.8
Wallaroo Marina	26	4.4
Rural/Other	10	1.7
Paskeville	3	.5
Total	588	100.0

Most (92.2 percent) non resident ratepayers own a house within the District. These dwellings tend to be reasonably large with 57.4 percent having three bedrooms, and a further 27.6 percent comprising four or more bedrooms – see Table 1.3. Further, the majority of properties owned by non resident ratepayers – 55.7 percent – are fully owned, while 43.5 percent are currently being purchased through a mortgage facility. Among non resident ratepayers, 27.5 percent have plans to upgrade. Within this group 60 percent owned three bedroom homes, while 27 percent owned dwellings with more than three bedrooms.

The nature of non resident owners' plans to upgrade is shown in Table 1.2. Of owners who plan to rebuild their dwelling, all but three own relatively small properties with two or three bedrooms. Further, 73.2 percent of owners with plans to renovate have two or three bedroom dwellings, while 23.8 percent own dwellings with four bedrooms. Owners who bought their property for investment reasons, or as a holiday house or for retirement were most likely to have plans to upgrade their property.

Table 1.2: Nature of plans to upgrade

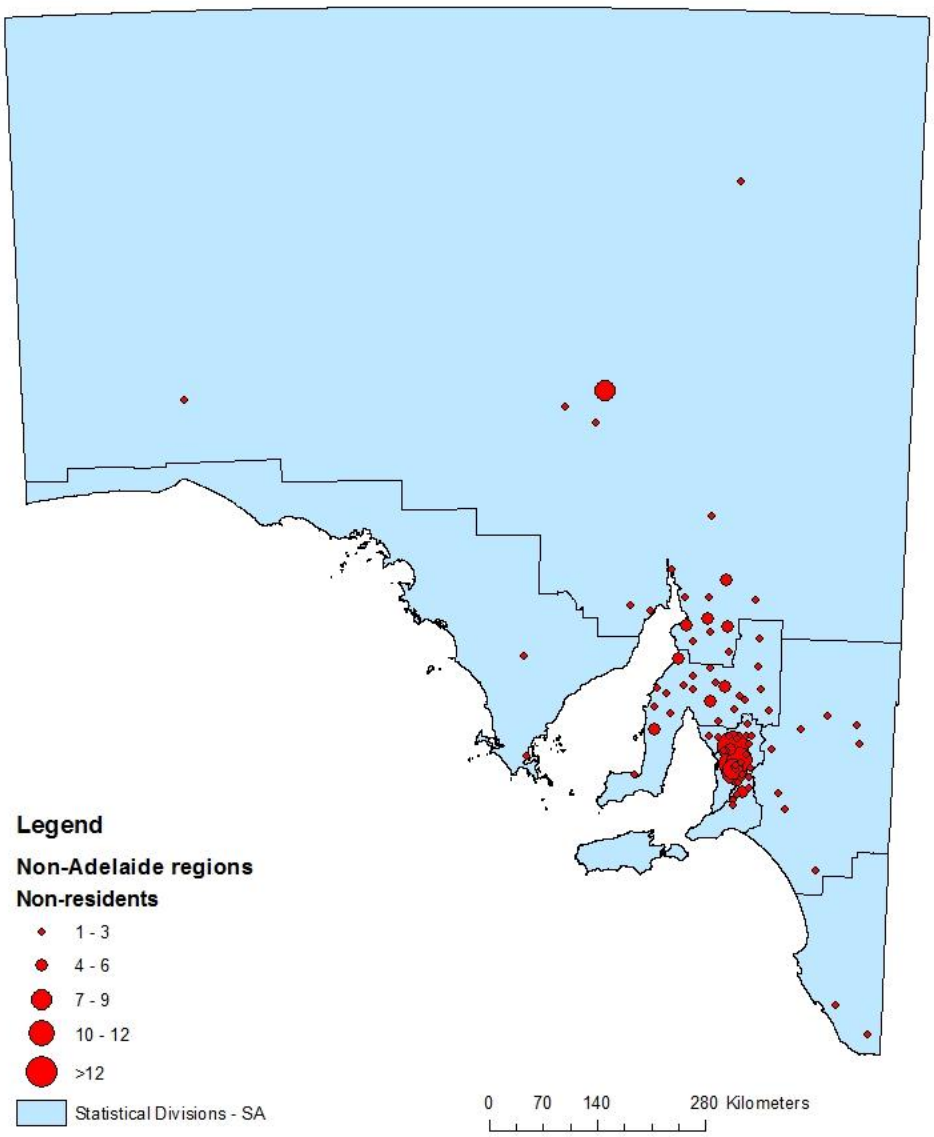
Upgrade plans	Number	Percent
Other renovations	36	21.8
Rebuild dwelling	33	20.0
Renovate garden/entertainment area	17	10.3
Verandah/decking	15	9.1
Renovate kitchen	13	7.9
Increase storage space/shedding	10	6.1
Add new bedroom	8	4.8
Add several bedrooms	4	2.4
Add new bathroom	3	1.8
Add second storey/balcony	3	1.8
Install pool	2	1.2
Build tennis court	1	.6
Install solar power/insulation	1	.6
Fencing	1	.6
Other	18	10.9
Total	165	100.0

Most non resident properties have been purchased since 2000. In the 2000-2009 period some 56.6 percent of all properties owned by non residents in the district were purchased, while a further 14.3 percent have been purchased in the three years since 2010. Clearly, the

attractiveness of the District to non residents has become a significant phenomenon since the turn of the century, with nearly 71 percent of properties owned by non residents being bought during this time. This result may also indicate the high level of volatility in the "holiday Home" property market within the Copper Coast.

Most non resident (94.5 percent) owners live in South Australia, with a further 2.2 percent living in the Northern Territory and 1.2 percent in Victoria. Figure 1.1 shows the distribution of non resident owners within South Australia but outside the Adelaide Statistical Division, while Figure 1.2 shows the distribution of non resident owners in the Adelaide Statistical Division.

Figure 1.1: South Australian non resident owners outside the Adelaide Statistical Division

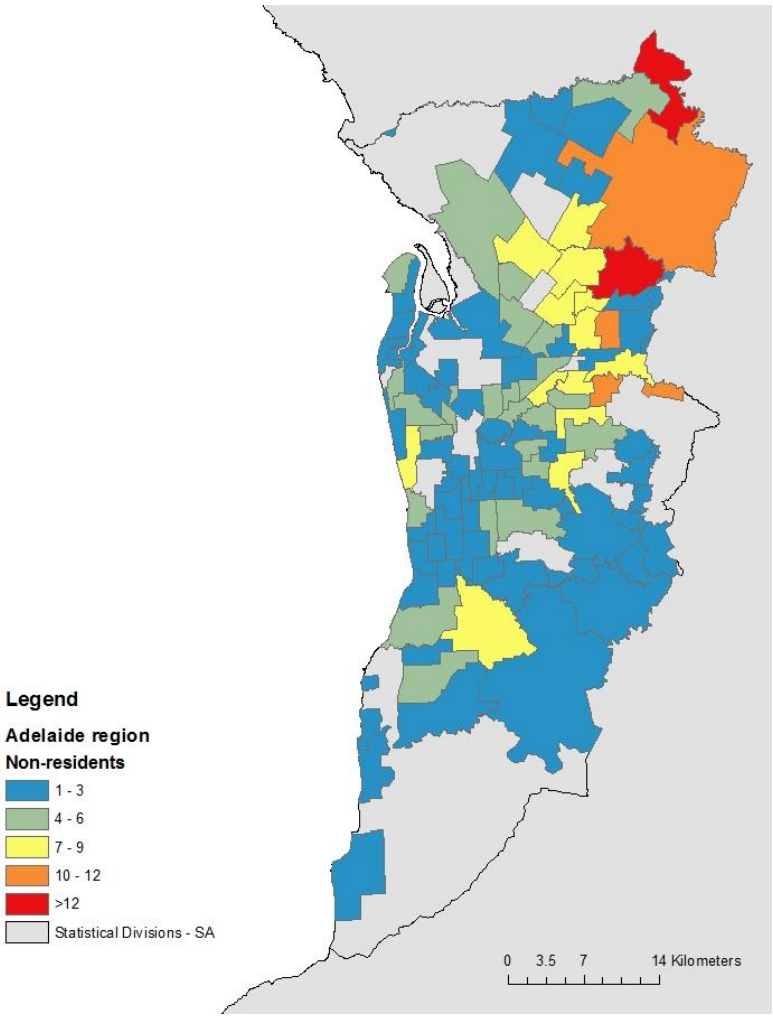


For non residents living within South Australia, but outside the Adelaide Statistical Division, there are several worthwhile points from the map.

- Firstly, sizeable numbers live near the Copper Coast, in the Yorke Peninsula, mid North and Iron Triangle region

- Secondly, there is a presence of non resident owners located in the mining areas of South Australia. Those non residents located in the Northern Territory may also be near mining activity.
- Thirdly, there is a huge concentration of non residents who live close to the Adelaide Statistical Division in the Outer Adelaide Statistical Division.

Figure 1.2: Non resident owners living in the Adelaide Statistical Division



Within the Adelaide Statistical Division, non residents are heavily concentrated in the northern, north eastern and eastern suburbs of Adelaide, which emphasises the impact of closeness to Adelaide as a factor influencing the decision to purchase a Copper Coast dwelling. Residents in the southern suburbs of Adelaide are probably more likely to look to the southern coastal areas of the state should they decide to buy into a coastal location.

The population target for the Northern Adelaide region in The 30 Year Plan for Greater Adelaide[1] is for a net additional population of 169,000 people. While it is beyond the scope of this report to extrapolate what this will mean in terms of additional non resident ratepayers for the Copper Coast, it is clear that this is a substantial increase in population, and if this new population adopts similar leisure preferences in terms of second homes to the current

[1] The 30 Year Plan for Greater Adelaide, Government of South Australia, 2010. See Chapter E, Regional Targets and Directions, Northern Adelaide, Page 160.

population, then this area will continue to place demand on the Copper Coast for holiday home opportunities.

Table 1.3: Number of bedrooms in dwelling

Bedrooms	Number	Percent
0	1	.2
1	2	.3
2	86	14.5
3	341	57.4
4	141	23.7
5	17	2.9
6	6	1.0
Total	594	100.0

Table 1.4: Year of purchase, non residents' properties

Year of Purchase	Number	Percent
Pre 1980	29	5.1
1980-1989	51	9.0
1990-1999	85	15.0
2000-2009	321	56.6
2010-2012	81	14.3
Total	567	100

In the survey, non resident ratepayers were asked to indicate the main reasons why they purchased their Copper Coast property. These are detailed in Table 1.5. There are three main reasons that attract non residents to buy into the Cooper Coast – the investment potential, as a holiday destination and its location qualities. Other reasons are linked to these – for example, lifestyle, retirement and the coastal amenity offered by many locations within the District.

Table 1.5: Reasons for purchasing in Copper Coast

Reason	Number	Percent
Investment/financial benefit	133	16.0
Holidays/holiday house	125	15.0
Location	110	13.2
Family ties/family reasons	79	9.5
Lifestyle	77	9.3
Retirement	76	9.1
The beach/good beach/safe beach	72	8.7
Fishing	69	8.3
Proximity to Adelaide	31	3.7
Price/affordability	20	2.4
Future residence/future plans	11	1.3
Friends lived, or had holiday house, in Copper Coast	10	1.2
Facilities/infrastructure in general	9	1.1
Work/business	6	0.7
Sea Change/coastal location	3	0.4
Golf course/other sporting facilities	1	0.1
Other	46	5.5
Total	832	100.0

Importantly, this has implications for council planning simply because the area is attractive on a number of accounts, and therefore is, and will continue to be, in demand. More importantly, the sector of the population which is likely to generate a large proportion of this demand is growing – the baby boomer generation is moving into retirement and potential relocation to non capital city locations. In 2006, baby boomers represented 27.5 percent of the population. As they age, this group will generate new demands for services from leisure to housing to health. They will also create new opportunities for service provision, and the employment attached to it, and volunteerism. The first wave of baby boomers is about to move into retirement, and it will take some 15 years for the entire cohort to move fully into retirement.

One third of non resident ratepayers, some 214 households, indicated that they were likely to make a permanent move to the Copper Coast. Table 1.6 below shows when these people expect to make the move. Of those expecting to move, 35.5 percent expected to do so within five years, with a further 26.6 percent expecting to move between five and ten years from the present time. An indication of what these intentions mean in terms of additional households into the District is shown in Table 1.7. It is clear that among the non residents who plan to move, the size of the family that will make the move is relatively small. The additive impact that this has on population is shown in Table 1.8, which simply uses the data in Table 1.7 to derive a head count in the families planning to move to the Copper Coast.

Table 1.6: Expected time frame for move to Copper Coast

Move	Frequency	Percent
Within two years	22	10.3
Between two and five years	54	25.2
Between five and ten years	57	26.6
Don't know	81	37.9
Total	214	100.0

Table 1.7: Non residents planning to move and size of family moving

Timing of move	Number of families by size who will move						Total
	1	2	3	4	5	6	
Within two years	3	15	2	0	1	0	21
Between two and five years	2	45	1	2	0	0	50
Between five and ten years	5	45	2	3	0	1	56
Don't know	4	41	3	11	1	0	60
Total	14	147	8	16	2	1	187

Table 1.8: Impact on population of current non resident households moving to Copper Coast

Timing of move	Population	Percent
Within two years	44	10.7
Between two and five years	103	25.1
Between five and ten years	119	29.0
Don't know	144	35.1
Total	410	100.0

What is suggested from table above is that current non resident ratepayers who plan to move permanently to the Copper Coast are expected to boost the population of the District by a little over 400 persons. Within the next two years these movers will add some 44 persons to the population, with a further 103 between two and five years from the present. But these

numbers are more significant than first appears, and from a planning perspective, there are a number of points arising from this.

- The 187 households on which these data are based represent 31.2 percent of the 600 households who responded to the survey. Within the Copper Coast there were 2,239 non resident households at the time of the survey.
- By assuming that the sampled households are representative of the entire population of non resident households with properties in the Copper Coast the data in Table 1.9 can be generated.
- Hence, the survey data forecasts an increase in population of non resident ratepayer households moving into the District of 164 new persons within two years, and an additional 384 between two and five years from the present.

Table 1.9: Number of non resident households likely to move extrapolated on basis of total non resident ratepayers in Copper Coast

Timing of move	Population, based on sampled households	Population, extrapolated to all households	Percent
Within two years	44	164	10.7
Between two and five years	103	384	25.1
Between five and ten years	119	444	29.0
Don't know	144	537	35.1
Total	410	1530	100.0

In relation to this discussion, and the future population of the Copper Coast, there are two allied processes that can be introduced. The first is the general process of internal migration which assesses the net results of mobility into and from the district, and its impact on total population. The second is the consideration of future population levels based not only on internal migration, but also on how births and deaths act to influence the size of total population.

At each census, persons are asked about where they lived five years and one year ago. This information allows information on the internal migration of Australians to be assessed at a number of levels, including state, statistical division, local government area and statistical local area. For any jurisdiction, these data allow for the measurement of intrastate mobility – that is the movement in and out of the jurisdiction that occurs from within the state, and interstate mobility – movement in and out of the jurisdiction from and to another state. The combined influence of intra-state and inter-state migration results in a net internal migration level for the jurisdiction. Net migration can be positive – resulting in population growth for the jurisdiction – or negative.

In Table 1.10, census data defining the local government area in which persons lived in 2001 and 2006 have been extracted to show the aspects of internal migration for the Copper Coast LGA.

Table 1.10: Internal migration, Copper Coast, 2001-2006

Cohort	Total			Intra-state			Inter-state		
	Departures	Arrivals	Net	Departures	Arrivals	Net	Departures	Arrivals	Net
Total Population	1684	2397	713	1344	2060	716	340	337	-3
0-14	212	331	119	152	291	139	60	40	-20
15-24	419	256	-163	368	224	-144	51	32	-19
25-44	429	669	240	322	593	271	107	76	-31
45-64	383	801	418	295	692	397	88	109	21
65 and over	242	337	95	181	290	109	61	47	-14

Source: ABS, 2006 Census. Data derived from TableBuilder

Note: In the table the total population may not be the sum of its constituent cohorts. The table is derived from an Australia wise matrix comprising thousands of cells. Many of these cells will have small numbers, and the ABS employs a randomisation process in these small cells to guarantee confidentiality. This process can have an effect, though not significant, when the sum of the parts is compared to the total.

There are many important points relating to internal migration and the Copper Coast that can be derived from the table:

- Internal migration accounted for a net gain of 713 persons between 2001 and 2006. Most of this gain came from within South Australia, as a result of intra-state mobility
- This net result is a result of 1,684 departures from the district, which were offset by 2,397 arrivals into the district. Most of the departures went to locations in South Australia, and most of the arrivals came from locations within South Australia. Table 1.11 shows the number of persons that various LGAs both gave up to the Copper Coast and received from the Copper Coast. LGAs with positive net mobility levels represent sources of population for the Copper Coast, while those with negative values represent sinks to which Copper Coast people are flowing. The table shows the local government areas within the Adelaide Statistical Division which are providing the Copper Coast with a substantial part of its growth. These LGAs are principally located in the northern part of the ASD – Salisbury, Port Adelaide Enfield, Tea Tree Gully, Playford and Gawler. Outside the ASD, major source LGAs located nearby are Barunga West, Yorke Peninsula and Clare and Gilbert Valleys. This stream may well comprise persons from rural properties retiring to the Copper Coast. In the case of Roxby Downs and Northern Areas LGAs, which contributed a net inflow of 79 persons in the 2001-2006 period, these may be mining industry employees who have opted for fly in fly out conditions rather than seeking accommodation in the mining regions. Alternatively, they could represent people who have left employment in these areas to live in the Copper Coast as well as working there or nearby. Whatever the explanation, it is not possible to be conclusive, and this is an area which requires further research.
- Table 1.10 above also throws light on the internal mobility characteristics of various age groups.
- Between 2001 and 2006, the Copper Coast experience net gains from internal migration in all cohorts except the 15-24 age group. This group experienced a net loss of 163 persons. This is the youth of the district and it is clear that currently it is difficult to retain this age group for reasons associated with employment and education opportunities. The destination for those in this cohort who leave is predominantly within the state.
- The cohorts contributing the most to population growth through internal migration are the 25-44 group and the 45-64 group. Employment opportunities available in the area probably account for the net mobility into the area by the younger cohort, while

employment and retirement reasons are likely to be the causative factors for the level of net mobility associated with the 45-64 years cohort.

- There are many additional aspects of net migration in the Copper Coast which can be gleaned from careful perusal of the table.

Table 1.11: Net sources and sinks within South Australia, Copper Coast, 2001-2006

LGA	Departures	Arrivals	Net	LGA	Departures	Arrivals	Net
Salisbury (C)	94	227	133	Ceduna (DC)	6	8	2
Port Adelaide Enfield (C)	71	153	82	Lower Eyre Peninsula	7	9	2
Tea Tree Gully (C)	50	128	78	Marion (C)	58	60	2
Barunga West (DC)	42	110	68	Naracoorte and Lucindale	3	5	2
Roxby Downs (M)	7	65	58	Barossa (DC)	30	31	1
Yorke Peninsula (DC)	50	105	55	Tatiara (DC)	5	6	1
Playford (C)	94	146	52	Adelaide (C)	6	6	0
Clare and Gilbert Valleys	14	49	35	Elliston (DC)	3	3	0
Gawler (T)	13	38	25	Grant (DC)	3	3	0
Whyalla (C)	23	45	22	Maralinga Tjarutja (AC)	0	0	0
Loxton Waikerie (DC)	10	31	21	Robe (DC)	0	0	0
Northern Areas (DC)	14	35	21	Southern Mallee (DC)	3	3	0
Wakefield (DC)	32	51	19	Tumby Bay (DC)	6	6	0
Charles Sturt (C)	63	81	18	West Torrens (C)	39	39	0
Onkaparinga (C)	80	98	18	Cleve (DC)	4	3	-1
Port Pirie City and Dists	55	73	18	Franklin Harbour (DC)	4	3	-1
The Coorong (DC)	3	20	17	Peterborough (DC)	8	7	-1
Kangaroo Island (DC)	0	15	15	Renmark Paringa (DC)	8	7	-1
Port Augusta (C)	13	28	15	Kimba (DC)	7	4	-3
Adelaide Hills (DC)	19	32	13	Alexandrina (DC)	26	22	-4
Goyder (DC)	7	17	10	Campbelltown (C) - SA	35	31	-4
Berri and Barmera (DC)	14	23	9	Port Lincoln (C)	18	14	-4
Murray Bridge (RC)	8	17	9	Yankalilla (DC)	4	0	-4
Wattle Range (DC)	3	10	7	Anangu Pitjantjatjara (AC)	5	0	-5
Kingston (DC)	0	6	6	Mallala (DC)	15	10	-5
Coober Pedy (DC)	7	12	5	Mount Remarkable (DC)	11	4	-7
Mid Murray (DC)	11	16	5	Norwood Payneham St	23	16	-7
Mitcham (C)	25	30	5	Prospect (C)	16	8	-8
Orroroo/Carrieton (DC)	0	5	5	Burnside (C)	14	5	-9
Streaky Bay (DC)	0	5	5	Walkerville (M)	13	0	-13
Flinders Ranges (DC)	0	4	4	Holdfast Bay (C)	29	12	-17
Karoonda East Murray	0	3	3	Victor Harbor (C)	22	3	-19
Le Hunte (DC)	0	3	3	Light (RegC)	36	15	-21
Mount Gambier (C)	9	12	3	Mount Barker (DC)	35	10	-25
Unley (C)	11	14	3	Total	1344	2060	716

After each census, the South Australian Department of Planning and Local Government uses the results of the census as well as estimates of international and internal migration, and births and deaths, to project future populations in the State's statistical local areas, local government areas and statistical divisions. This exercise was last undertaken by the DPLG in 2011, and projected population for twenty years from the base point of 2006 out to 2026. For the District Council of Copper Coast, the results of this exercise are shown in Table 1.12. The table also shows the actual population for the District recorded at the 1996 and 2001 censuses.

Table 1.12: Projected population, Copper Coast, 2006-2026

	Census population at 30 June:			Projected population at 30 June:			
	1996	2001	2006	2011	2016	2021	2026
Males	4,826	5,172	5,836	6,427	6,934	7,432	7,924
Females	5,057	5,374	5,971	6,541	7,003	7,482	7,947
Total	9,883	10,546	11,807	12,968	13,937	14,914	15,871
		Actual population change, numbers					
		1996-2001	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026
Males		346	664	591	507	498	492
Females		317	597	570	462	479	465
Total		663	1,261	1,161	969	977	957
		Average population change					
		1996-2001	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026
Males		1.4	2.4	1.9	1.5	1.4	1.3
Females		1.2	2.1	1.8	1.4	1.3	1.2
Total		1.3	2.3	1.9	1.5	1.4	1.3

Source: Department of Planning and Local Government, 2011, Projected population by sex, LGAs in South Australia, 2006-2026

There are a number of points that can be made from the table:

- Between 1996 and 2001, actual growth occurred at a level just a little above half that which occurred in the succeeding period, 2001-2006.
- The increase of 1,261 persons experienced between 2001 and 2006 has not been projected to be repeated in the following period, although the results of the 2011 census, to be published in August 2012, will verify whether this projected level actually occurred.
- Based on the assumptions employed in 2011, the DPLG has projected a tendency for population growth to be flat in the period from 2011 to 2026.
- The projected data suggests that average annual population growth will reduce marginally, for both males and females, during each of the five year periods from 2011 out to 2026.

Respondents were also asked to indicate the number of children presently living with them in a range of school defined groupings. Table 1.13 shows the number of children in each of the school groups in relation to households' plans to move to the Copper Coast. From a planning perspective, there are a couple of points to be made here. Firstly, the actual numbers of children in the various school types who are expected to arrive in the near future is small. More problematic are the numbers whose expected arrival time is unknown. It is likely, however, that the number of expected arrivals may be matched by departures, and that the significant increases in school aged children may come from persons already resident in the District.

Table 1.13: Children in school groupings by households' intentions to move to Copper Coast

Expected move	Pre School - Government	Pre School - Non Government	Primary School - Government	Primary School - Non Government	Secondary School - Government	Secondary School - Non Government	Tertiary
	Number of children						
Within two years			3	1	4		1
Between two and five years	2		1		6	2	5
Between five and ten years	1	1	6	2	3	6	8
Don't know	4	1	16	8	8	13	9
Total	7	2	26	11	21	21	23

1.2.2 Non residents use of their property

In an area such as the Copper Coast, it is expected that non residents will impact on population levels at various times during the year. Non residents can be second home owners, but they can be people visiting friends and relatives, holiday makers staying at caravan parks, hotels and motels, or day trippers. Many coastal areas experience substantial population increases at weekends and in holiday periods, and these fluctuations can have profound implications, especially on infrastructure provision related to water, energy, sewerage, parking, police, and health services. If these are not provided to accommodate peak populations, then stresses and strains are likely to occur when capacity is stretched. Population increases at certain times can also affect the health and character of communities. Where a component of the temporary population is comprised of second home owners, as in the Copper Coast, it can contribute to house price increase and generate affordability issues for the incumbent population. Most critically, because the non-resident populations are not counted at the census, councils with a substantial temporary population receive a smaller share of financial assistance grants than may be necessary to meet the infrastructure and services needs of peak holiday and weekend populations.

To shed some light on the extent of additional population caused by non resident ratepayers using their Copper Coast dwelling, respondents were asked to indicate how much time they spent in the Copper Coast in an average year. Where an actual number of days were indicated, this was coded. However, where a generalised response was given, this was "translated" into an average number of days per year. Table 1.14 indicates that just over half of non resident ratepayers spend between one and three months at the Copper Coast property. An additional 12.8 percent spend between three and six months in the Copper Coast. Some 13 percent of respondents indicated that they spent no time in the District.

Table 1.14: Time spent in Copper Coast by non resident ratepayers

Time spent in Copper Coast	Number	Percent
No time	76	13.3
One week	26	4.5
Two weeks	23	4.0
Three weeks	17	3.0
Four weeks	44	7.7
Between one and three months	291	50.9
Between three and six months	73	12.8
Between six and nine months	18	3.1
Between nine and twelve months	4	.7
Total	572	100.0

The survey data can be used to derive an estimate of the additive impact that non resident ratepayers have on the total population of the Copper Coast during the year. As explained above, information on time spent in the Copper Coast has been converted into a number of days for each household. As well, data from Questions 20 and 21 made possible a determination of how many people live in each non resident ratepayer's usual residence. If we assume that all members of the household participate each time the household visits the Copper Coast, then the total number of person days spent in the Copper Coast in any year is 78,716. The concept of person days is a count of the number of days each person in each household spent in the Copper Coast during the year. It is, therefore, a form of census that counts people from non resident ratepayer homes who were in the Copper Coast at various times during the year. If the number of person days is divided by 365, then a full time equivalent number is derived, identifying the extent of additional people that this group adds to the Copper Coast population which is not counted at the time of the Census. Using our current data, the size of the full time equivalent population is 216 persons. This is based on the responses of 600 non resident ratepayer households. In the Copper Coast, at the time of the survey, there were 2,239 non resident households. If the impact of the sample on equivalent full time persons added to the prevailing Copper Coast population is applied to the 2,239 non resident households, then the additive effect of all non resident households on the resident population is 806 persons. These are "real" people who use the Copper Coast and its facilities. However, they were probably not counted on the night of the Census. Had they been counted, then the population of the Copper Coast at the census would have been 6.8 percent higher. And this higher number would have been employed by Commonwealth funding bodies to allocate funding to the region. Further, this increase in real population is based only on second home owners, and does not take into account persons holidaying with friends and relatives, in hotels, motels, and caravan parks, or the day trippers and people simply passing through the area.

The survey also asked non resident ratepayers whether they rented out their properties. The responses are listed in Table 1.15. While 57.6 percent of non resident ratepayer properties are not rented, 20 percent are either fully rented or rented long term, with a further 17.5 percent rented out occasionally.

Table 1.15: Rental tenure of non resident properties in Copper Coast

Is property rented?	Number	Percent
No	345	57.6
Occasionally	105	17.5
Long term	12	2.0
Fully rented	108	18.0
Other	29	4.8
Total	599	100.0

These rental characteristics explain the large proportion of non resident ratepayers who spent no time in their properties. Indeed, 72 of the 76 respondents who indicated they spent no time at their Copper Coast property rented out that property. The use of these properties by holidaying visitors to the Copper Coast will also have an additive impact on the area's prevailing population. However, we do not have data from the survey to enable an estimate of this population to be made. Where non resident ratepayers' Copper Coast properties are rented out to long term renters, these renters are probably captured in the census, and therefore do not form part of the area's temporary population. However, and property that is rented out short term is most likely to create a component of temporary population that is over looked by the census. In this respect, people using rental properties short term are in the same category as those person mentioned above who stay with friends or relatives, or use

caravan parks, hotels, motels and apartments for their stay in the Copper Coast. They are an important part of the area's temporary population.

1.2.3 Demographic characteristics of non resident ratepayers

This section presents the results from a number of questions relating to family status, age and sex, employment and marital status, and household income. Table 1.16 shows the family status composition of non resident property owners. Couple households predominate, comprising more than 81 percent of households. Couples with children are 44.2 percent of the sample population, compared with 37.4 percent for couples without children.

Table 1.16: Family status, non resident ratepayer households

Family status	Number	Percent
Couple without children	222	37.4
Couple with children	262	44.2
Single parent	14	2.4
Lone person	43	7.3
Other	52	8.8
Total	593	100

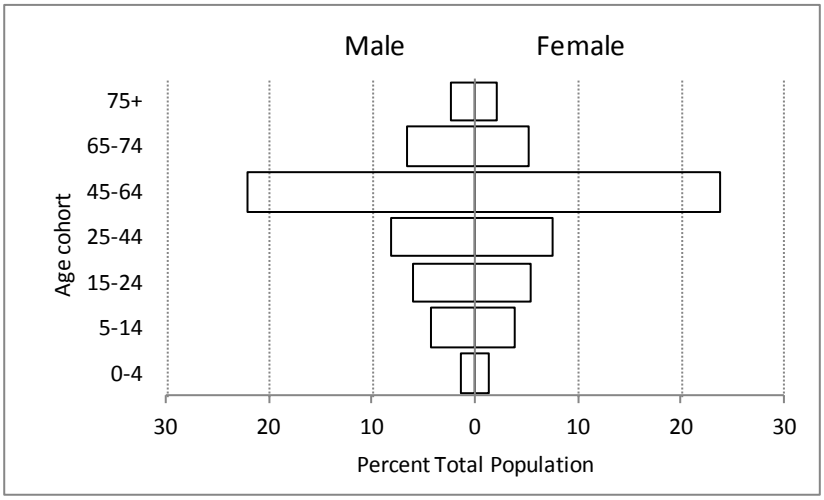
These households comprised 1,312 persons, and the age and sex breakdown of this population is presented in Table 1.17.

Table 1.17: Age and sex composition of non resident ratepayer population

Age cohort	Male	Female	Male	Female
	Number		Percent	
0-4	18	19	1.4	1.4
5-14	57	50	4.3	3.8
15-24	78	70	5.9	5.3
25-44	107	99	8.2	7.5
45-64	289	312	22.0	23.8
65-74	87	69	6.6	5.3
75+	30	27	2.3	2.1
Total	666	646	50.8	49.2

There are a number of pertinent observations stemming from this table and its age sex structure shown in Figure 1.3.

Figure 1.3: Age sex structure of non resident ratepayer population



Firstly, there is a very close balance between males and females. Secondly, the structure is heavily influenced by the pre retirement group aged 45-64 years, and represents nearly 46

percent of the non resident ratepayer population. Relative to this group, proportions in the older age groups are quite small.

The age structure of the non resident population suggests that should any of the group choose to move permanently to the Copper Coast they will in all likelihood be in the early retirement group. This should not be seen in a negative light, as it is a group which has much to offer local communities.

The numbers of persons in the early stage of their working careers is small, while the youth cohort, aged 15-24 years, school aged children and preschool children cohorts are very small. This is not to say that non resident ratepayer households do not have teenage or sholl aged children. Rather, for most of these households, their children have left home and therefore are not included in the survey. It suggests that most non residents committed to buying their Copper Coast properties when they were at a stage of life when they could afford a second home which served as a holiday home until it became a retirement location on finishing work.

Table 1.18 provides a breakdown of the age structure of members of households expecting to make a move to the Copper Coast at some time. The table is in two parts. The first shows the age structure within households based on their time frame for moving to the Copper Coast. There are several points that are worth noting from this section of the table:

- Nearly 74 percent of persons in households expecting to move with two years are aged 54-74 years.
- In households expecting to move between two and five years from now, the proportion of persons aged 45 years and older is above 78 percent.
- The clear conclusion here is that households that move to the Copper Coast within the next five years will bring in a large proportion of persons in the pre-retirement age group and retired age groups.
- With households expecting to move between five and ten years, the proportion of older aged persons in the household is less. However, during the time before they move, these people will have aged, and so their decision to move will still bring an older population into the region.
- The “don’t know” group has the highest proportions of younger persons. However, it is highly likely that by the time this group decides to move, the younger persons will be older and may or may not make the move. Hence, the age structure of persons moving at that time will, in all likelihood, be one just as aged as those making the move within the next ten years.

From a planning perspective, current non resident ratepayers moving into the Copper Coast will add to the current structure generated by an ageing population. It means that demand for services associated with an ageing population will increase, rather than decline. Hence, the demand on health and medical services and transport will increase, as will the demand for leisure activities associated with an older population. The opportunity for community service through voluntary activity will also increase.

Table 1.18: Age structure of persons in households expecting to move to Copper Coast

Expected time before moving to Copper Coast	Age of persons in household							Total
	0-4	5-14	15-24	25-44	45-64	65-74	75 or >	
	Number							
Within two years	0	5	2	4	23	8	0	42
Between two and five years	0	2	16	9	89	8	1	125
Between five and ten years	1	9	26	14	99	4	2	155
Don't know	8	27	38	43	96	17	3	232
Total	9	43	82	70	307	37	6	554
	Age by time of expected move (row percentage)							
Within two years	0.0	11.9	4.8	9.5	54.8	19.0	0.0	100.0
Between two and five years	0.0	1.6	12.8	7.2	71.2	6.4	0.8	100.0
Between five and ten years	0.6	5.8	16.8	9.0	63.9	2.6	1.3	100.0
Don't know	3.4	11.6	16.4	18.5	41.4	7.3	1.3	100.0
Total	1.6	7.8	14.8	12.6	55.4	6.7	1.1	100.0
	Time of expected move by age (column percentage)							
Within two years	0.0	11.6	2.4	5.7	7.5	21.6	0.0	7.6
Between two and five years	0.0	4.7	19.5	12.9	29.0	21.6	16.7	22.6
Between five and ten years	11.1	20.9	31.7	20.0	32.2	10.8	33.3	28.0
Don't know	88.9	62.8	46.3	61.4	31.3	45.9	50.0	41.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

The second part of the table above shows the expected time frame for movement by each age cohort. Several pertinent points can be made:

- In the younger age groups up to 14 years, the highest proportions are in the "Don't know" time frame for movement and between five and ten years. This suggests that the parents of these people are still working, and cannot be sure when they will move, although there is a commitment to move at some time in the future.
- In the 25-44 years group, only 38.6 percent of the cohort knows when they are going to move to the Copper Coast. However, in the 45-64 years age group, this proportion increases to 68.7 percent, and 54.1 percent for the 65-74 years group. Hence, as the population of non resident ratepayers age, their propensity to predict a time frame for movement to the Copper Coast increases.

From the data it is possible to determine the size of each household. As Table 1.19 shows, the overwhelming majority (65 percent) of non resident ratepayer households comprise one or two persons. Further, it is this group that is most likely to be moving to the Copper Coast in the foreseeable future. It is clear from Table 1.20 that 85 percent of households expecting to move to the Copper Coast within two years will be one and two person households. In the period between two and five years from now, one and two person households will represent more than 77 percent of the households expecting to move. Hence, it is clear that among the non resident ratepayer cohorts, households planning to move will be predominantly small households, comprising one or two persons. It is highly likely that this cohort will be an aged cohort, but nevertheless one that can make a valuable contribution to the community.

For non resident ratepayers moving to the Copper Coast there are no issues associated with planning to accommodate these persons as they already own their residence. However, there is a larger group of households who will choose to locate in the Copper Coast for the same reasons that non resident ratepayers choose to move. These households will have similar characteristics to the non resident ratepayers and will be looking for housing options to meet their circumstances. If they choose to build they will need suitable and affordable land options, and if they seek to buy then the dwelling structure will need to meet their housing

needs. What these are needs further investigation and this is a challenge for Copper Coast planners.

Table 1.19: Size of non resident ratepayer households

Size of Household	Number	Percent
One person	61	10.4
Two persons	319	54.6
Three persons	58	9.9
Four persons	98	16.8
Five persons	48	8.2
Total	584	100

Table 1.20: Size of non resident household by expected time for move to Copper Coast

Expected move	Size of household					Total
	One person	Two	Three	Four	Five	
Within two years	4	13	1	1	1	20
Between two and five years	2	39	5	5	2	53
Between five and ten years	3	33	3	13	5	57
Don't know	6	31	13	25	5	80
Total	15	116	22	44	13	210
	Percentage					
Within two years	20.0	65.0	5.0	5.0	5.0	100.0
Between two and five years	3.8	73.6	9.4	9.4	3.8	100.0
Between five and ten years	5.3	57.9	5.3	22.8	8.8	100.0
Don't know	7.5	38.8	16.3	31.3	6.3	100.0

Table 1.21 indicates a number of features of households of varying size. Firstly, in terms of the older cohorts, 83.4 percent of persons aged 65-74 years are in two person households, while for persons aged 75 years and older, all but 11.4 percent are in one and two person households. Secondly, in terms of size of household, 41 percent of persons in one person households are aged 65 years and older, while for two person households the proportion is 30.9 percent. These data confirm the fact that the age of any current non resident ratepayers who move to the Copper Coast within five years from the present time will be predominantly in the young-old and old-old age cohorts.

Table 1.21: Age structure by household size

Age cohort	Number of persons in household					Total
	One	Two	Three	Four	Five	
0-4 years	0	0	11	14	14	39
5-14 years	0	1	11	69	48	129
15-24 years	0	6	26	93	58	183
25-44 years	11	30	43	94	53	231
45-64 years	25	404	76	117	55	677
65-74 years	13	146	5	4	7	175
75 years and older	12	51	2	1	5	71
Total	61	638	174	392	240	1505
	Percentage of cohort					
0-4 years	0.0	0.0	28.2	35.9	35.9	100.0
5-14 years	0.0	0.8	8.5	53.5	37.2	100.0
15-24 years	0.0	3.3	14.2	50.8	31.7	100.0
25-44 years	4.8	13.0	18.6	40.7	22.9	100.0
45-64 years	3.7	59.7	11.2	17.3	8.1	100.0
65-74 years	7.4	83.4	2.9	2.3	4.0	100.0
75 years and older	16.9	71.8	2.8	1.4	7.0	100.0
	Percentage of household					
0-4 years	0.0	0.0	6.3	3.6	5.8	
5-14 years	0.0	0.2	6.3	17.6	20.0	
15-24 years	0.0	0.9	14.9	23.7	24.2	
25-44 years	18.0	4.7	24.7	24.0	22.1	
45-64 years	41.0	63.3	43.7	29.8	22.9	
65-74 years	21.3	22.9	2.9	1.0	2.9	
75 years and older	19.7	8.0	1.1	0.3	2.1	
Total	100.0	100.0	100.0	100.0	100.0	

The employment status of non resident households is presented in Table 1.22. Persons employed full-time are the largest category, while the proportion of people who are retired ranks second, with 21.1 percent. The 6.9 percent of persons not in the labour force (NILF) may also comprise some retired persons. The level of persons unemployed is small, which is to be expected as these are households which own a property in the Copper Coast, which is not their home residence.

Table 1.22: Employment status of non resident households

Employment status	Number	Percent
Employed Full-time	643	44.5
Employed Part-time	247	17.1
Unemployed	9	0.6
Home Duties	60	4.1
Retired	305	21.1
Not in Labour Force (NILF)	100	6.9
Other	82	5.7
Total	1446	100.0

An analysis of the marital status of members of non resident ratepayer households is shown in Table 1.23. It indicates that nearly 70 percent of persons in these households are married, with much lesser proportions either widowed or divorced. Nearly a quarter have never been married, and these are most likely to represent persons aged up to 24 years.

Table 1.23: Marital status of persons in non resident households

Marital status	Number	Percent
Married	976	69.6
Widowed	33	2.4
Divorced	50	3.6
Never Married	343	24.5
Total	1402	100.0

A significant demographic category within any population is its occupation structure, as this is linked to socio-economic status. Table 1.24 shows the occupation structure of non resident households. It is significant that this group is highly represented in the higher status, and generally higher paid, occupations. Nearly 45 percent is employed in managerial and professional occupations, with a further 13 percent in technical and trades occupations. On the other hand, the proportion employed in the generally low socio-economic status occupations associated with machinery operation, driving and labouring is less than 16 percent. It would be expected that this occupational structure would reflect a household income structure skewed towards higher incomes. Table 1.25 confirms this relationship, in that 37.6 percent of households have income of $104,000 or more, with a further 18.2 percent having incomes between $78,000 and $103,999.

Table 1.24: Occupational structure of employed persons in non resident households

Occupation	Number	Percent
Managerial	213	26.2
Professional	152	18.7
Technical and Trades	108	13.3
Community and Personal services	103	12.7
Clerical and Adminstrative	111	13.6
Sales	69	8.5
Operators and drivers	25	3.1
Labourers	33	4.1
Total	814	100.0

Table 1.25: Income structure of non resident households

Household Income	Number	Percent
Less than $6,000	4	0.7
$6,000-$14,999	12	2.2
$15,000-$25,999	41	7.6
$26,000-$35,999	39	7.3
$36,000-$51,999	52	9.7
$52,000-$77,999	89	16.6
$78,000-$103,999	98	18.2
$104,000-$149,000	101	18.8
$150,000 or more	101	18.8
Total	537	100.0

It could be argued that if these households move to the Copper Coast, they will bring an income stream commensurate with these current high levels of household income. In other words, current non resident ratepayers who move to their Copper Coast property may be highly cashed up, as a result of superannuation streams commensurate with their occupational status, and possibly with proceeds from any sale of their non Copper Coast property. This will have implications for commerce in the area because retired persons are spenders, and are not always dependent solely on the age pension.

1.2.4 Behavioural characteristics of non resident ratepayers

This section presents an analysis of questions in the survey which sought an indication of the use they made of various local services during their time at their Copper Coast property. In terms of purchasing food provisions, Table 1.26 shows that non residents are very supportive of local businesses when they visit their Copper Coast property. Only one percent of non residents purchase all their food requirements at home and prior to making the trip to the Copper Coast, and only 7.4 percent buy most of their food supplies at home. On the other hand, 30.9 percent purchase all their food supplies after arriving in the Copper Coast and 43.9 percent buy most of their food requirements upon arrival.

Table 1.26: Extent of food purchases when visiting Copper Coast

Food purchases	Number	Percent
All in Copper Coast	180	30.9
Most in Copper Coast	256	43.9
Half in Copper Coast	98	16.8
Most at home	43	7.4
All at home	6	1.0
Total	583	100.0

Respondents were asked to indicate the frequency with which they used towns in the region for food and groceries, and the results are shown in Table 1.27.

Table 1.27: Use of towns in the region for food and groceries

Frequency of use	Kadina	Wallaroo	Moonta	Maitland	Minlaton	Ardrossan	Port Broughton	Other
	Number							
Exclusively	20	23	79				1	
Usually	131	138	180	1			3	
Often	149	74	52	4	2	3	3	4
Rarely	166	93	75	17	7	13	16	6
Never	18	94	65	260	271	264	260	155
Total	484	422	451	282	280	280	283	165
	Percentage							
Exclusively	4.1	5.5	17.5	0.0	0.0	0.0	0.4	0.0
Usually	27.1	32.7	39.9	0.4	0.0	0.0	1.1	0.0
Often	30.8	17.5	11.5	1.4	0.7	1.1	1.1	2.4
Rarely	34.3	22.0	16.6	6.0	2.5	4.6	5.7	3.6
Never	3.7	22.3	14.4	92.2	96.8	94.3	91.9	93.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

There are a several features which can be drawn from the table:

- Moonta has the highest proportion of visitors who use it “exclusively” and “usually” for food and groceries. This probably indicates patronage by non resident ratepayers living in Moonta, as well as Moonta Bay and Port Hughes.
- High proportions of visitors also use Kadina and Wallaroo “usually”.
- Kadina has the highest percentage of visitors who use it “often”, nearly twice the rate for Wallaroo and nearly three times the rate for Moonta
- Kadina has the highest proportion of visitors who use it “rarely”, probably because it is located the greatest distance from the coast, and from localities such as Moonta, Moonta Bay and Port Hughes
- It is clear that visitors to the Copper Coast make relatively minimal use of facilities available in Maitland, Ardrossan and Port Broughton.

Table 1.28 shows the frequency of use of the main towns in the region for food and grocery shopping by non resident ratepayers when in the Copper Coast, based on the area within the Copper Coast in which their property is located. This table expands on the previous one by adding a geographical element to visitors' use of services in the region's centres.

Table 1.28: Use of towns for grocery and food shopping by location of property

Service town	Frequency of use	Location of Copper Coast property								
		Kadina	Wallaroo	Wallaroo Marina	North Beach Wallaroo	Moonta	Moonta Bay	Port Hughes	Paskeville	Rural/ Other
		Percentage								
Kadina	Exclusively	29.0	2.0	0.0	1.2	6.5	1.4	0.0	66.7	10.0
	Usually	32.3	28.7	50.0	49.4	3.2	16.3	12.2	33.3	50.0
	Often	9.7	33.7	36.4	28.4	25.8	35.4	28.6	0.0	40.0
	Rarely	22.6	31.7	13.6	21.0	51.6	42.9	55.1	0.0	0.0
	Never	6.5	4.0	0.0	0.0	12.9	4.1	4.1	0.0	0.0
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Wallaroo	Exclusively	0.0	14.5	7.7	4.6	0.0	0.0	0.0	0.0	0.0
	Usually	5.3	59.0	53.8	50.6	0.0	2.9	2.8	100.0	28.6
	Often	15.8	20.5	30.8	29.9	5.0	4.9	2.8	0.0	42.9
	Rarely	47.4	5.1	7.7	14.9	30.0	39.2	41.7	0.0	28.6
	Never	31.6	0.9	0.0	0.0	65.0	52.9	52.8	0.0	0.0
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Moonta	Exclusively	0.0	0.0	0.0	0.0	35.6	21.4	31.3	0.0	17.4
	Usually	14.3	3.3	6.7	2.6	42.2	62.0	50.0	16.7	40.2
	Often	0.0	6.6	13.3	10.3	15.6	13.5	12.5	0.0	11.5
	Rarely	52.4	44.3	53.3	35.9	4.4	3.1	6.3	50.0	16.9
	Never	33.3	45.9	26.7	51.3	2.2	0.0	0.0	33.3	14.0
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Maitland	Usually	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.4
	Often	0.0	1.8	0.0	0.0	10.5	1.1	0.0	0.0	1.4
	Rarely	20.0	5.3	7.7	0.0	10.5	3.2	12.5	0.0	6.1
	Never	80.0	93.0	92.3	100.0	78.9	94.7	87.5	100.0	92.1
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Minlaton	Often	5.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.7
	Rarely	5.3	3.5	0.0	0.0	5.3	2.2	3.0	0.0	2.5
	Never	89.5	94.7	100.0	100.0	94.7	97.8	97.0	100.0	96.7
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Ardrossan	Often	0.0	3.4	0.0	0.0	5.3	0.0	0.0	0.0	1.1
	Rarely	10.5	5.2	0.0	0.0	5.3	4.4	9.1	0.0	4.7
	Never	89.5	91.4	100.0	100.0	89.5	95.6	90.9	100.0	94.2
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Port Broughton	Exclusively	0.0	0.0	0.0	0.0	5.0	0.0	0.0	0.0	0.4
	Usually	5.0	1.8	0.0	2.6	0.0	0.0	0.0	0.0	1.1
	Often	0.0	1.8	7.1	0.0	0.0	0.0	3.1	0.0	1.1
	Rarely	5.0	7.0	14.3	7.9	5.0	3.2	3.1	0.0	5.4
	Never	90.0	89.5	78.6	89.5	90.0	96.8	93.8	100.0	92.1
	Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

There are a number of points that can be made about visitor shopping behaviour relative to where their property in the Copper Coast is located:

- Visitors whose property is in Kadina do most of their day to day shopping in Kadina, with lesser use of nearby Wallaroo and Moonta. Virtually no use is made of facilities available in the other service centres in the region.
- For non resident ratepayers in Wallaroo, a component uses Wallaroo exclusively, but in general their shopping is confined to Wallaroo and Kadina.

- Similar shopping behaviour is demonstrated by visitors with holiday homes at Wallaroo Marina and North Beach Wallaroo.
- Non resident ratepayers with properties in Moonta, Moonta Bay and Port Hughes are very committed to using the services provided in Moonta. For these visitors, Moonta not only is the nearest centre, but also it clearly serves their needs to the extent that they see no need to use services at Wallaroo and Kadina.

In summary, Kadina and Wallaroo receive a greater degree of shared patronage from visitors, regardless of their location, while Moonta derives the bulk of its patronage from visitors located in Moonta and close by Moonta Bay and Port Hughes.

Respondents were also asked to indicate how often they used the centres for non food household goods and clothing while resident in the Copper Coast. As shown in Table 1.29, visitors do not tend to use any of the centres exclusively for these purchases. Of the centres that are usually used for purchase of household goods and clothing while in the Copper Coast, Kadina and Moonta are the two dominant centres, with Wallaroo ranked third. Wallaroo's ranking may indicate that these types of services are less prevalent there than in Kadina and Moonta, or even non existent. Whether this is a policy matter for local decision making needs to be determined. New development plans for Wallaroo, including new commercial development, may work to change this current situation.

Table 1.29: Use of towns in the region for non food household goods and clothing

Frequency of use	Kadina	Wallaroo	Moonta	Maitland	Minlaton	Ardrossan	Port Broughton
	Number						
Exclusively	27	7	17				1
Usually	216	66	134				
Often	114	47	94	1	3	2	1
Rarely	135	136	111	18	8	8	11
Never	29	128	84	269	279	280	266
Total	521	384	440	288	290	290	279
	Percentage						
Exclusively	5.2	1.8	3.9				0.4
Usually	41.5	17.2	30.5				
Often	21.9	12.2	21.4	0.3	1.0	0.7	0.4
Rarely	25.9	35.4	25.2	6.3	2.8	2.8	3.9
Never	5.6	33.3	19.1	93.4	96.2	96.6	95.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

An additional aspect of consumer behaviour relates to use of takeaway food outlets and restaurants by non resident visitors when in the in the Copper Coast. The frequency of visitors' use of the services is shown in Table 1.30. The first point is that the frequencies with which visitors use these alternatives for home cooking are similar for both takeaway food outlets and restaurants. Visitors neither "overdo" nor "never" eat out. The main differences between the two eating options is that visitors use restaurants more for special occasions than they do takeaway food outlets, and a higher proportion of visitors rarely use takeaway food outlets compared with restaurants.

Table 1.30: Takeaway meals and eating out in the Copper Coast

Frequency	Takeaway		Restaurant	
	Number	Percent	Number	Percent
Daily	18	3.6	12	2.3
More than once per week	77	15.5	69	13.3
Weekly	114	23.0	106	20.4
Fortnightly	33	6.7	40	7.7
Monthly	70	14.1	82	15.8
Special occasions	64	12.9	134	25.8
Rarely	104	21.0	64	12.3
Never	16	3.2	12	2.3
Total	496	100.0	519	100.0

Table 1.31 indicates visitors' likely responses if they needed access to specialist medical services while resident in the Copper Coast. It would seem that visitors would rely heavily on services available in the region in these circumstances. A little over a quarter indicated that they would return home to their normal provider while the remainder would be prepared to see someone local and/or attend one of the Copper Coast hospitals. In some respect, this is a vote of confidence in the facilities available in the Copper Coast, but it is also reminder of the need for these services to be available and maintained not only for the resident population but for the visitor population that does make demands on these services.

Table 1.31: Use of specialist medical services in Copper Coast

If specialist medical services needed	Number	Percent
See someone locally	221	38.6
Return home to normal provider	157	27.4
Attend Copper Coast hospital	184	32.2
Go elsewhere	10	1.7
Total	572	100.0

There is always some demand for services that are not available in a location. The survey asked respondents whether there were any particular health services not presently provided and which they would like to see established. Only 16 percent of non resident ratepayers responded to this questions, suggesting that, in the main, respondents were generally satisfied with the existing level of services.

In Table 1.32, the sporting and recreational activities that non resident ratepayers engage in while in the Copper Coast are shown. Not surprisingly, fishing, swimming and boating predominate. These are, after all, the major reasons that non resident ratepayers have properties in the Copper Coast.

Table 1.32: Sport and recreation activities while in Copper Coast

Sport/recreation activity	Number	Percent
Fishing	349	30.1
Swimming	253	21.8
Boating	247	21.3
Golf	83	7.2
Fitness	46	4.0
Lawn Bowls	30	2.6
Football	25	2.2
Tennis	23	2.0
Sailing	15	1.3
Cricket	12	1.0
Netball	11	0.9
Basketball	8	0.7
Soccer	7	0.6
Other	49	4.2
Total	1158	100.0

Volunteerism is an increasingly important aspect of any community, especially in older and ageing communities. Non resident ratepayers were asked to indicate whether or not they were a member of any voluntary community group. About 12 percent of non resident ratepayers are presently members of voluntary community groups, and the types of organisation they are in are shown in Table 1.33. Within the group, service club membership dominates, although there is a sizeable representation in hospital based organisations, neighbourhood watch type organisations and Meals on Wheels. On this evidence, it is likely that some voluntary involvement in the community will occur should non resident ratepayers make a decision to move permanently to the Copper Coast.

Table 1.33: Membership of voluntary community groups

Community Group	Number	Percent
Service Clubs	15	20.8
Hospital based organisations	7	9.7
Neighbourhood Watch/Progress Associations/Men's sheds	6	8.3
Meals on Wheels	5	6.9
Red Cross/Salvation Army/RFDS/Sea Rescue/Anglicare/Lifeline etc	3	4.2
RSL	3	4.2
Rural based organisations	2	2.8
Sporting clubs	2	2.8
Church based organisations	2	2.8
School based organisations	1	1.4
Other	26	36.1
Total	72	100.0

The final part of the survey asked respondents to indicate the most favourable and least favourable aspects of the Copper Coast, as well as any local issues which concerned them. Table 1.34 shows respondents view of the most favourable aspects of the Copper Coast. These aspects are the Copper Coast's greatest assets, and they will ensure that the Copper Coast continues to be a place where non residents purchase holiday homes, non residents decide to make a permanent move to the region, and day tripper tourists pour into the area.

Table 1.34: Most favourable aspects of Copper Coast

Aspect	Number	Percent
Coasts/beaches	315	33.4
Lifestyle	129	13.7
Fishing	94	10.0
Quiet/peaceful	82	8.7
Location/holiday destination	65	6.9
Closeness to Adelaide	64	6.8
History/charm/nice towns	47	5.0
The people/friendly	40	4.2
Facilities/hotels/restaurants	38	4.0
Climate/weather	32	3.4
Holiday destinantion	3	0.3
Housing/land costs	2	0.2
Retirement location	2	0.2
Other	30	3.2
Total	943	100.0

In contrast, Table 1.35 lists the least favourable aspects of the Copper Coast in the eyes of the non resident ratepayer population. There are clear implications for the District Council of the Copper Coast in relation to many of these comments from non resident ratepayers, especially in terms of roads, parks and gardens, the boat ramp at Port Hughes, rubbish disposal, infrastructure development in towns other than Kadina and the Council itself. Business, too, can respond to issues such as extent of services provided and Saturday/weekend trading.

Table 1.35: Least favourable aspects of Copper Coast

Aspect	Number	Percent
Roads	168	26.0
Aspects of Council	71	11.0
Poor maintenance of parks, gardens, footpaths, allotments	61	9.5
Limited retail choice/postal delivery/Saturday trading	60	9.3
Boat ramps/congestion	35	5.4
Sewerage/rubbish collection/dump issues/improved green waste disposal	34	5.3
Tourists!!	17	2.6
Upgrading in other towns	16	2.5
Employment opportunities	12	1.9
Distance from Adelaide	8	1.2
Speed limits	8	1.2
Aspects of harvest season	4	0.6
Negativism	4	0.6
Cycling/walking tracks	3	0.5
Invasion of big retail chains	3	0.5
Swimming pool	2	0.3
Other	139	21.6
Total	645	100.0

Finally, respondents were asked to indicate any other local issues that were of concern to them, and Table 1.36 provides a summary of the responses. Many of these issues have been identified in earlier questions, and most have policy and planning implications for the Copper Coast Council. Some of the issues included in the “other” category include television

reception in the area, level of police presence, need for rest stops on roads, the level and rate of population growth in the region and aspects of the marina development.

Table 1.36 Other local issues identified by non resident ratepayers

Issue	Number	Percent
More sealed roads/road maintenance	74	22.4
Port Hughes boatramp	30	9.1
Sewerage connections	21	6.4
Rubbish collection	19	5.8
Equal spending in each town	17	5.2
Parkland improvements	15	4.5
Pending closure of dump	8	2.4
Changed speed limits	5	1.5
Ferry/tourism boosts	4	1.2
Expand Wallaroo hospital	4	1.2
Additional traffic signs	2	0.6
Additional sporting facilities	1	0.3
Internet/mobile phone coverage	1	0.3
Moonta-Pt Hughes Road	1	0.3
Other	128	38.8
Total	330	100.0

1.2.5 Summary

1. The overwhelming majority of non residents (88.6) percent) owned just one property in the Copper Coast, and most of their buying activity has occurred since 2000.
2. Non residents have a clear preference for properties with a coastal location, and this is a function of the main reasons given by non residents for purchase in the Copper Coast – lifestyle, retirement and coastal amenity.
3. A substantial proportion of non resident owners have plans to upgrade their property, which has implications for the capital value of the housing stock within the district.
4. A third of non residents have plans to move permanently to the Copper Coast. This decision will have significant implications in terms of extra persons in the District, as well as for the age structure, the level of income available for spending and the number of persons available for voluntary involvement in the community.
5. The survey indicated that the impact on schooling facilities is likely to be less than that generated by the permanent population in the area.
6. Apart from the impact non-residents will have on future population levels through in-migration, there is a significant population impact generated by their time-to-time use of their Copper Coast property. The data suggest that non residents have an additive impact on population representing some 6.8 percent of the 2006 population for the district recorded at the 2006 census. A fifth of non residents' properties are rented out long term, and persons living in these dwellings are probably counted in the census. However, 17.5 percent rented out their property on an occasional basis, and it is likely that the people living in these will add to the 6.8 percent of "uncounted" population of the district.
7. A number of demographic characteristics of the non resident group were surveyed. More than a third comprised couples without children, but 44 percent of households comprised couples with children. It's arguable that this in itself represents a motivation for buying a holiday property. Nearly 46 percent of non residents are in the pre-retirement age group of 45-64 years, and it is these people who, in large part, indicated that they would make the move to the Copper Coast at sometime in the future. When they do this, therefore, they will add to the ageing of the *in situ*

population of the Copper Coast. Of households expecting to move to the District within the next two years, 85 percent will be one and two person households, and a number of planning implications associated with this have been mentioned above.

8. Presently, nearly 62 percent of non residents are employed, either full time or part time, with a further 28 percent retired or not in the labour force. It is significant that this group is highly represented in the higher status, and generally higher paid, occupations.
9. Non residents make substantial contributions to the local economy when in the Copper Coast. Only one percent of non residents purchase all their food requirements at home and prior to making the trip to the Copper Coast, and only 7.4 percent buy most of their food supplies at home. Visitors neither "overdo" nor "never" eat out at takeaway outlets and restaurants when in the Copper Coast, but do have a preference for restaurants for "special occasions" compared with takeaway food outlets.
10. While in the Copper Coast, non resident visitors are quite prepared to use local medical and hospital services. From a service provision perspective, these results have implications for demand, especially at peak visitor times, such as Easter, school holidays and the Christmas period.
11. Non residents have their holiday homes in the Copper Coast because of its greatest assets – its coast and beaches, the quiet and peaceful lifestyle it offers, the fishing and its closeness to Adelaide. This notwithstanding, there are some concern mainly revolving around roads, maintenance of parks and gardens and footpaths, issues with council, boat ramps and rubbish disposal and sewerage connections.

1.2.6 Recommendations and suggestions

- Most non residents have bought their Copper Coast property since 2000. It is suggested, therefore, that the second home concept is a recent one for the Copper Coast. Further, second home owners seek, overwhelmingly, a coastal location, preferably with views of the Gulf. Other components of the housing market, such as young families and people living in Kadina for work or retirement, do not necessarily have this locational requirement. Second residence demand will continue, and new housing subdivision should be developed with this in mind.
- A third of non residents plan to move to the Copper Coast permanently. The survey has indicated that 85 percent of these will comprise one and two person households when they move. These new arrivals will be without the children who presently come with them to use the second home. Therefore, there will be no children arriving with them to add to the youth of the district. Instead, the movers will add to the area's already ageing population. An ageing population has implications for planning, especially around infrastructure and services sought by an ageing population. These demographic changes are already underway in the Copper Coast, and planners have already begun to accommodate these new sets of client demands on council. What the survey confirms is that these demands cannot be expected to diminish with time.
- It is clear from the survey that non residents have a significant impact on the *de facto* population of the area, estimated to add 6.8 percent to the Copper Coast's 2006 population. This level of full time equivalent additional population takes no account of additional temporary populations added to the Council's base population by persons who rent, from time to time, properties owned by non resident ratepayers. Council should look to developing further information around this issue, as it has significant implications in terms of any funding received from funding bodies based on population measured at the census.

- Non residents indicated a clear preference to use local medical and hospital services should the need arise while they are in the Copper Coast. The impact of additional populations at various times of the year can stretch available resources. Council could further examine this issue by survey demand for medical and hospital services during peak holiday times, as well as other services and infrastructure, such as visitor centres and boat ramps, which can be subjected to stress at these times. These data could reinforce Council's claim for funding to alleviate these stresses associated with the ebb and flow of temporary populations at different times throughout any year.
- Non residents have invested heavily in the Copper Coast to take advantage of its features that they want to enjoy – its beaches and coastline, its fishing opportunities and quiet lifestyle, and its closeness to Adelaide. Nevertheless, they do have some issues which are directed squarely at Council. These relate to roads, boating infrastructure, rubbish disposal and sewerage connections. These are matters which Council can address. When addressed, there is considerable public relations goodwill that can be achieved with its non resident ratepayer population.

CHAPTER 2. COPPER COAST REPORT – SURVEY OF PERMANENT RESIDENTS

2.1 INTRODUCTION

This chapter details the results from the Resident survey, details of which are shown in Appendix 1. The first part describes selected characteristics of the property resident ratepayers own in the Copper Coast, while the emphasis in the second part is one how this property is used. In the third section the emphasis is on defining selected demographic characteristics of the non resident ratepayer population. In this section, the characteristics portrayed in the survey population will be compared with those reported at the 2006 census. Finally, the Report details their responses to a range a questions mainly revolving around behaviour, consumption and responses to a range of issues within the district.

2.1.1 Permanent residents' property characteristics

Table 2.1 shows the distribution of permanent resident ratepayers within the District. Nearly one third of respondents lived in Kadina, a little over one fifth in Wallaroo and almost one fifth in Moonta Bay. Residents responding to the survey and living in Moonta represented a further 12.3 percent of all respondents.

Table 2.1: Distribution of permanent resident properties

Suburb/Town	Number	Percent
Kadina	369	31.4
Wallaroo	265	22.6
Moonta Bay	232	19.7
Moonta	145	12.3
Port Hughes	55	4.7
North Beach Wallaroo	46	3.9
Wallaroo Marina	32	2.7
Rural/Other	20	1.7
Paskeville	11	0.9
Total	1175	100.0

Most (96.9 percent) permanent resident ratepayers own their house. These dwellings tend to be reasonably large with 57.1 percent having three bedrooms, and a further 27.6 percent comprising four or more bedrooms, as shown in Table 2.2.

Table 2.2: Number of bedrooms in dwelling

Number of bedrooms	Number	Percent
One	14	1.3
Two	150	14.1
Three	609	57.1
Four	270	25.3
Five	22	2.1
Six	2	0.2
Total	1067	100.0

Further, the majority of properties owned by permanent resident ratepayers – 74.4 percent – are fully owned, while 25 percent are currently being purchased through a mortgage facility. These relative proportions between fully owned and purchasing are quite different from the levels prevailing for non resident ratepayers.

At the 2006 census, 91.9 percent of occupied dwellings were separate houses, as shown in Table 2.3. The high proportion of houses, in contrast to the numbers of alternative dwellings such as semi-detached, flats, units and apartments, is probably due to the a reduced level of

population diversity in the Copper Coast, compared with more urbanised centres where high employment levels, a variety of employment choices, a large proportion of households beginning the family life cycle and a varied student population creates a demand for dwelling types other than the separate detached house on its own allotment.

Table 2.3: Dwelling structure, Copper Coast, 2006

Dwelling structure	Number	Percent
Separate house	4,442	91.9
Semi-detached, row or terrace house, townhouse (a)	151	3.1
Flat, unit or apartment (b)	148	3.1
Other dwelling (c)	90	1.9
Total	4,831	100.0

Notes:

(a) All semi detached, row or terrace dwellings were single storey

(b) All flats, units or partments were single storey

(c) Includes caravans, cabins, houseboats, improvised homes, house or flat attached to a shop

Source: ABS, 2006 Community Profile Series, Time series profile

In terms of tenure, Table 2.4 shows the situation prevailing at the time of the 2006 census. The proportions of dwellings that are owned or being purchased are higher in the survey than indicated at the time of the census. The reason is because the census data includes households which are renters, and this category was excluded from the survey because renters are not ratepayers.

Table 2.4: Tenure by dwelling type, Copper Coast, 2006

Tenure	Separate house	Semi-detached, row or terrace house, townhouse	Flat, unit or apartment	Other dwelling	Total
	Number (Occupied dwellings)				
Fully owned	2,050	41	18	38	2,147
Being purchased	1,213	12	9	13	1,247
Rented	921	71	112	27	1,131
Other tenure type	34	17	6	5	62
Total	4,218	141	145	83	4,587
	Row percent (Tenure by dwelling type)				
Fully owned	95.5	1.9	0.8	1.8	100.0
Being purchased(a)	97.3	1.0	0.7	1.0	100.0
Rented	81.4	6.3	9.9	2.4	100.0
Other tenure type(d)	54.8	27.4	9.7	8.1	100.0
	Column percent (Dwelling type by tenure)				
Fully owned	48.6	29.1	12.4	45.8	46.8
Being purchased(a)	28.8	8.5	6.2	15.7	27.2
Rented	21.8	50.4	77.2	32.5	24.7
Other tenure type(d)	0.8	12.1	4.1	6.0	1.4
Total	100.0	100.0	100.0	100.0	100.0

Source: ABS, 2006 Community Profile Series, Time series profile

A quarter of respondents have always lived in the District. Table 2.5 shows the time of arrival in the Copper Coast for the remainder of the permanent population. More than half the respondents have lived in the region since the turn of the century, with a further one fifth having bought into the area between 1990 and 1999. This is a situation not dissimilar to that identified for the non resident population. The main finding here is that the region is experiencing significant housing market activity. It means that a large proportion of the permanent resident ratepayer population is relatively new to the area, and this will have a number of implications, especially in terms of this new group fitting into the region, joining clubs and other groups, and generally increasing their social interaction. It also means that existing organisations have a substantial population of potential recruits whose talents could

be utilised if they were encouraged. Most importantly, it demonstrates that there is clearly an attractiveness to the region, and this is a characteristic that needs to be promoted in terms of encouraging further growth in the area.

Table 2.5: Time of first move into the Copper Coast by permanent residents

Time	Number	Percent
Pre 1960	45	5.1
1960 to 1969	16	1.8
1970 to 1979	50	5.7
1980 to 1989	125	14.2
1990 to 1999	175	19.9
2000 to present	467	53.2
Total	878	100.0

In any jurisdiction there is likely to be intra jurisdiction mobility by households, as they re-assess their housing needs or aspirations. Respondents were asked to indicate when they moved into their present dwelling, in contrast to when they moved to the Copper Coast. Table 2.6 cross tabulates the time they moved into the current dwelling with the time they moved into the Copper Coast. The row percentages relate time of arrival of households in the area by time of movement to their current dwelling. In other words, it gives an indication of the extent to which households have moved within the Copper Coast since their time of arrival. Of course, there may have been multiple moves between time of arrival and current location. However, the survey did not seek an indication of all locations in which respondents had lived since their arrival in the Copper Coast. Nevertheless, the row percentages are instructive in that they indicate, for any arrival period, the proportion of households which remain in the dwelling they occupied on first moving to the Copper Coast. For example, 16.3 percent of households arriving pre 1960 remain currently in that dwelling. Further, 32.6 percent moved out of their pre 1960 dwelling to a new dwelling between 2000 and the present. Are these households downsizing, or upgrading, or moving to retirement accommodation within the District? A second observation from the row percentage component of the table is that it indicates, generally, that the longer a household has been in the district, the less likely they are to be currently in their original dwelling. For example, only 16.3 percent of pre 1960 households remain in their current dwelling, but 63.6 percent of households arriving in the period 1990-1999 remain in their original dwelling.

The column percentages show for households' current dwelling, the year when they first moved into the district. The diagonal data, especially for the periods 1970-1979 through to 2000 to present are instructive, in that they indicate the proportion of households which have remained *in situ* since arrival in the Copper Coast. For example, of all the households that arrived in the 1970-1979 period, 54.2 percent remain in their first dwelling. That is, they have not been residentially mobile since coming to the Copper Coast. For households arriving in the 1980-1989 period, 76 percent remain in the original property, while the proportions for households in the two succeeding periods are 67.9 percent and 78.1 percent respectively. There is a conclusion here that residential mobility is more likely to occur within households that have been established in the area for a significant period of time, rather than in those that are more recently arrived.

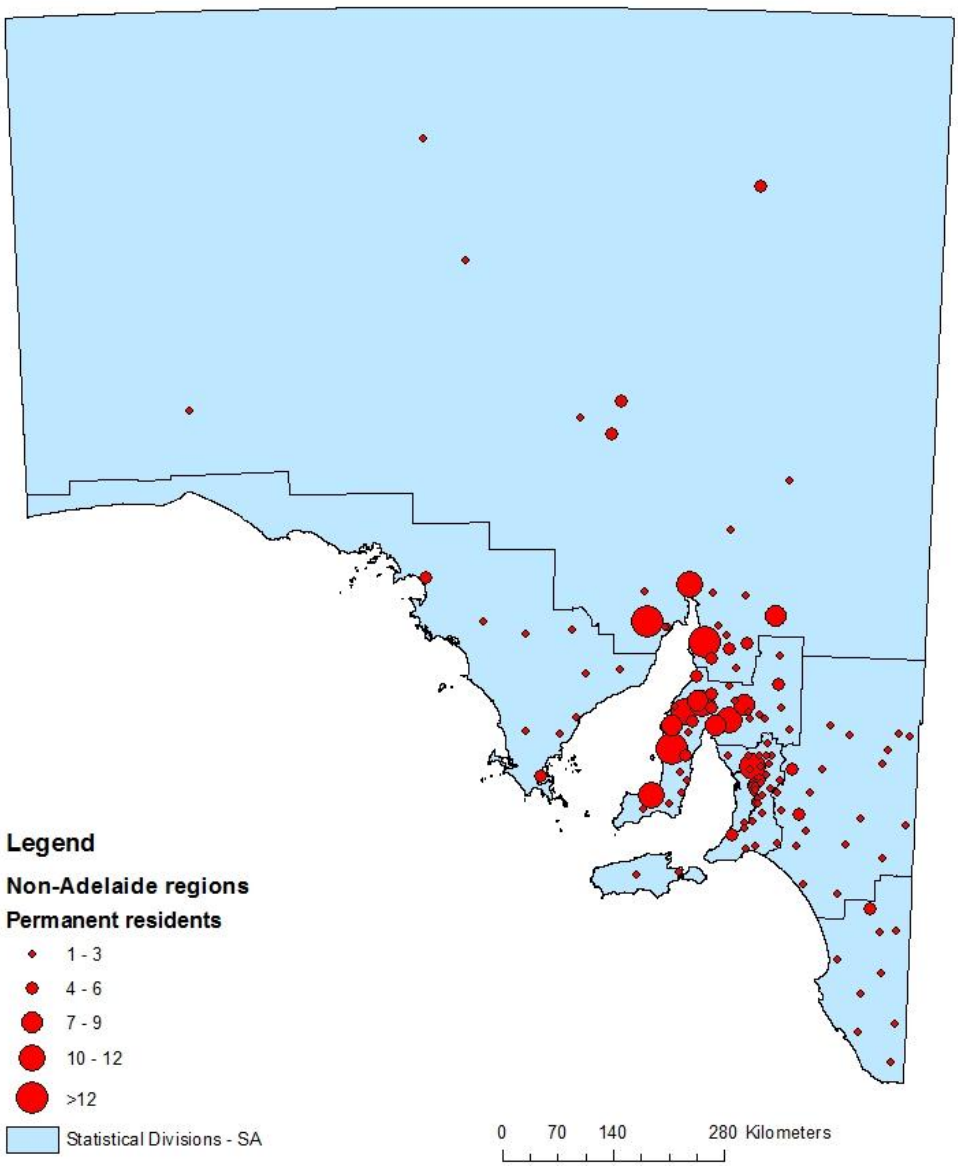
Table 2.6: Year moved into current dwelling by year moved to Copper Coast

Year of first move to Copper Coast	Year moved into current dwelling						Total
	Pre 1960	1960 to 1969	1970 to 1979	1980 to 1989	1990 to 1999	2000 to present	
Pre 1960	7	6	10	2	4	14	43
1960 to 1969			1	4	6	4	15
1970 to 1979			13	12	10	14	49
1980 to 1989				57	32	35	124
1990 to 1999					110	63	173
2000 to present						463	463
Total	7	6	24	75	162	593	867
	Row percentage						
Pre 1960	16.3	14.0	23.3	4.7	9.3	32.6	100.0
1960 to 1969	0.0	0.0	6.7	26.7	40.0	26.7	100.0
1970 to 1979	0.0	0.0	26.5	24.5	20.4	28.6	100.0
1980 to 1989	0.0	0.0	0.0	46.0	25.8	28.2	100.0
1990 to 1999	0.0	0.0	0.0	0.0	63.6	36.4	100.0
2000 to present	0.0	0.0	0.0	0.0	0.0	100.0	100.0
	Column percentage						
Pre 1960	100.0	100.0	41.7	2.7	2.5	2.4	
1960 to 1969	0.0	0.0	4.2	5.3	3.7	0.7	
1970 to 1979	0.0	0.0	54.2	16.0	6.2	2.4	
1980 to 1989	0.0	0.0	0.0	76.0	19.8	5.9	
1990 to 1999	0.0	0.0	0.0	0.0	67.9	10.6	
2000 to present	0.0	0.0	0.0	0.0	0.0	78.1	
Total	100.0	100.0	100.0	100.0	100.0	100.0	

Residents who had not always lived in the Copper Coast were asked where they had previously lived. As would be expected, most come from within SA, with a substantial number coming from the Adelaide area. However, 4.3 percent previously lived in the Northern Territory, 2.5 percent in New South Wales, 1.6 percent in Victoria, one percent in Queensland, and small percentages from Western Australia and Tasmania. Figure 2.1 shows the distribution of residents' previous location within South Australia but outside of the Adelaide Statistical Division. The most striking observation is that large numbers of residents previously lived relatively close to the Copper Coast, be it in the Yorke Peninsula region, the mid North, or the towns of the iron triangle.

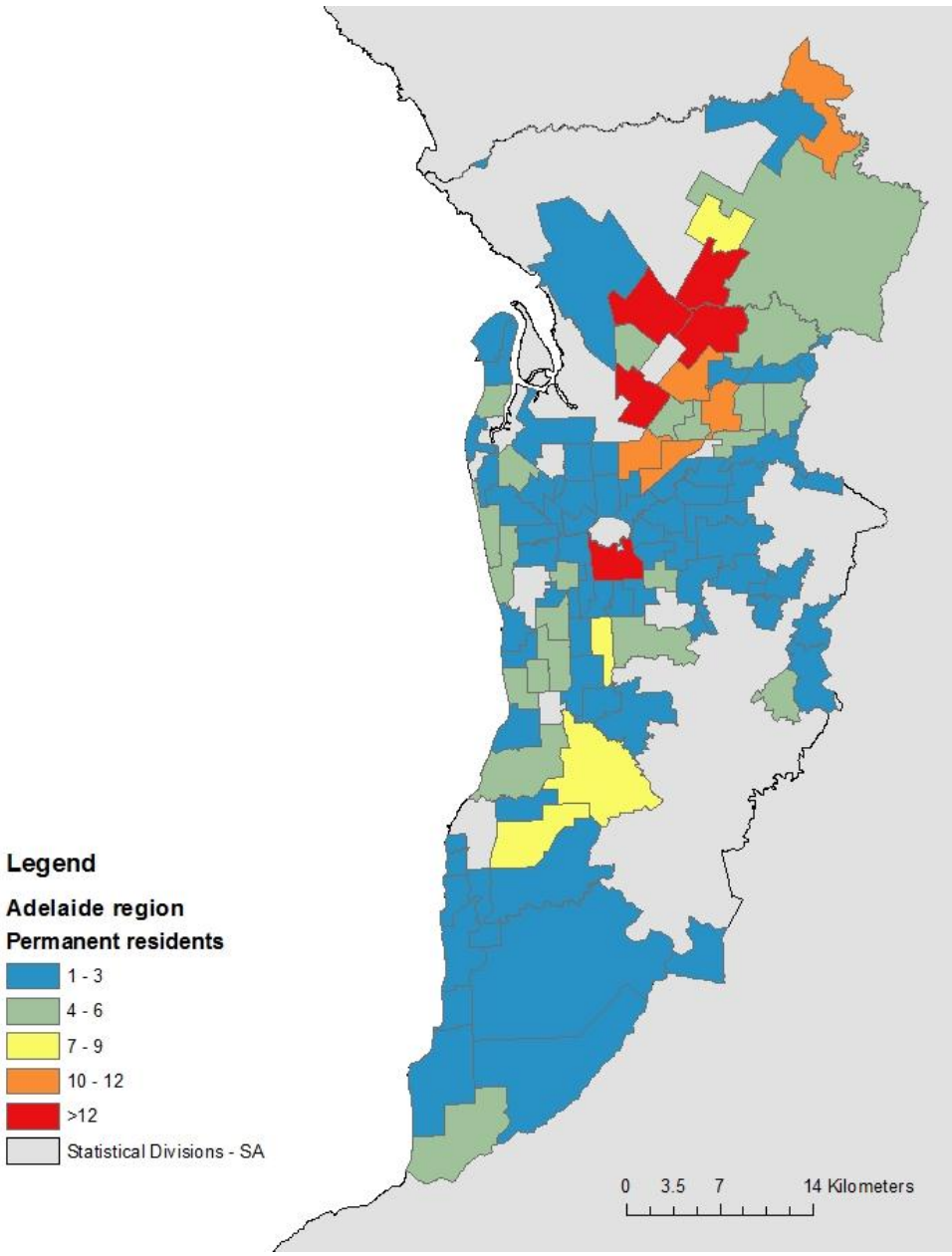
Many residents lived previously in the Adelaide Statistical Division, and Figure 2.2 shows the distribution of these residents by postcodes. What is most distinctive about where Copper Coast residents previously lived is their concentration in the northern suburbs of Adelaide, and relatively low numbers in the older suburbs and southern suburbs. If persons living in these older and southern areas move to sea change locations, it is probable the most convenient direction for them to go is towards south coast locations.

Figure 2.1: Residents previous location within South Australia, excluding the Adelaide Statistical Division



As mentioned earlier, the population target for the Northern Adelaide region in The 30 Year Plan for Greater Adelaide is for a net additional population of 169,000 people. While it is beyond the scope of this report to estimate what this will mean in terms of newcomers to the Copper Coast, it is clear that this is a substantial increase in population, and if this new population adopts similar intrastate mobility to the current population, then this area will continue to place demand on the Copper Coast for housing opportunities.

Figure 2.2 Residents previous location within the Adelaide Statistical Division



In the survey, resident ratepayers were asked to indicate the main reasons why they purchased their Copper Coast property. These are detailed in Table 2.7. There are four main reason that attracted permanent residents to move to the Cooper Coast. Lifestyle and environment was the most significant reasons, indicated by 18.3 percent of residents. Employment or business reasons were mentioned by 15.5 percent of respondents, while retirement (12.6 percent) and family reasons (11.1 percent) rounded off the most prevalent reasons for moving to the Copper Coast.

Other reasons are linked to these – for example, lifestyle and environment have a high correspondence with sea change/coastal location (8.0 percent) and location (5.4 percent), while family reasons are linked to the reason to be nearer to family and friends (3.4 percent). Interestingly, the investment and financial potential of the purchase did not feature to the

same degree as for non residents' reasons for buying their property. For non residents, the investment potential of the property was the most prevalent reason given for buying into the Copper Coast.

Table 2.7: Reasons for purchasing in Copper Coast

Reason	Number	Percent
Lifestyle/environment	228	18.3
Employment/business	193	15.5
Retirement	157	12.6
Family reasons	138	11.1
Seachange/coastal location	100	8.0
Location	67	5.4
Proximity to Adelaide	53	4.3
Nearer family/friends	42	3.4
Medical facilities	41	3.3
Other	35	2.8
Price/affordability	33	2.7
The beach/good beach/safe beach	27	2.2
Holidayed here/friends here	24	1.9
Health reasons	23	1.8
Marriage/partner	22	1.8
Personal	19	1.5
Semi-retirement	16	1.3
Future residence/future plans	14	1.1
Investment/financial benefit	7	0.6
Sport and recreation	5	0.4
Facilities/infrastructure	1	0.1
Total	1245	100.0

2.1.2 Demographic characteristics of resident ratepayers

This section presents the results from a number of questions relating to family status, age and sex, employment and marital status, and household income. Table 2.8 shows the family status composition of permanent residents. Couple households predominate, comprising more than 72 percent of households, compared with 82 percent in the case of non residents. Couples with children are 22.2 percent of the sample population, compared with 50.2 percent for couples without children. This is the reverse of the relationship between these two groups which prevailed with the non residents. Single parents comprise 2.2 percent of the resident population, while lone person households comprise 22.5 percent of the non resident population. Indeed, the couple families with children and lone person households are equally represented in the community. Significantly, nearly three quarters of all households in the Copper Coast comprise families without children.

Table 2.8: Family status, resident ratepayer households

Family status	Number	Percent
Couple without children	584	50.2
Couple with children	258	22.2
Single parent	26	2.2
Lone person	262	22.5
Other	34	2.9
Total	1164	100.0

At the 2006 census, the proportion of couple families without children was somewhat lower than the level indicated from the survey – see Table 2.9. On the other hand, the proportion in

single parent and lone person households was higher at the census than in the survey. This difference is due to the fact that households in rental properties are counted at the census, but were not counted in the survey. These higher proportions in single parent and lone households then work to dilute the proportion of households comprising couples without children. The proportion of couples with children households was essentially the same in the survey as that which prevailed in 2006 at the time of the census.

Table 2.9: Family status, Copper Coast, 2006

Family status	Number	Percent
Couple without children	1,660	35.8
Couple with children	1,092	23.6
Single parent family	423	9.1
Lone household	1,329	28.7
Other, incl group households	127	2.7
Total	4,631	100.0

Source: ABS, 2006 Community Profile Series, Time series profile

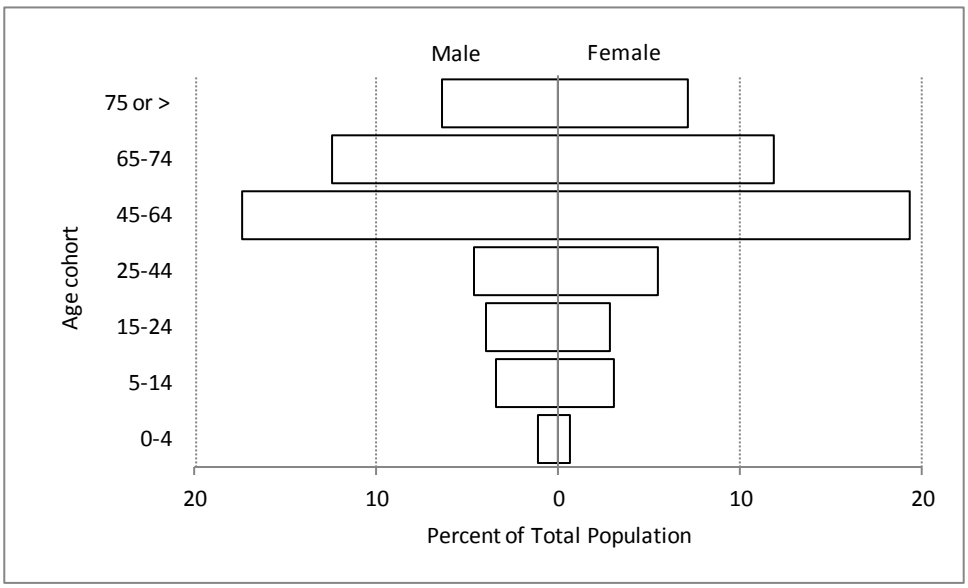
The surveyed households comprised 2,262 persons, and the age and sex breakdown of this population is presented in Table 2.10.

Table 2.10: Age and sex composition of resident ratepayer population

Age	Male	Female	Male	Female
	Number		Percent of Total Population	
0-4 years	24	16	1.1	0.7
5-14 years	77	69	3.4	3.1
15-24 years	90	64	4.0	2.8
25-44 years	104	124	4.6	5.5
45-64 years	392	436	17.4	19.4
65-74 years	281	268	12.5	11.9
75 years and older	145	162	6.4	7.2
Total	1113	1139	49.4	50.6

There are a number of pertinent observations stemming from this table and its age sex structure shown in Figure 2.3.

Figure 2.3: Age sex structure of resident ratepayer population

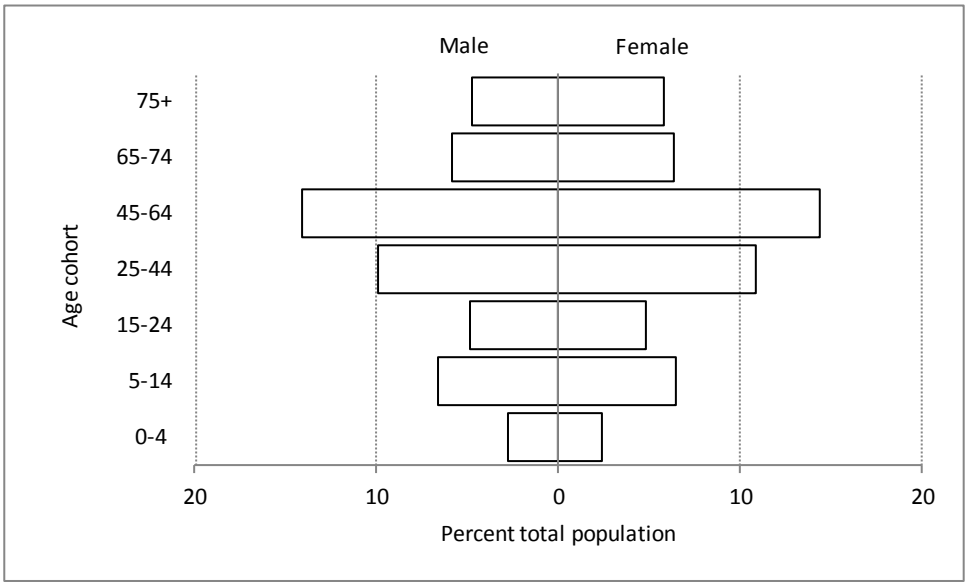


Firstly, within the total population there is a close balance between males and females, with women outnumbering men 50.6 percent to 49.4 percent. The age structure is highly

representative of an older and ageing population. The 45-64 years cohort, the pre retirement cohort, is the largest, but the two older cohorts are quite sizeable. Relative to the older cohorts, the younger cohorts are substantially smaller. The smallest is the 0-4 years cohort, indicating a low level of fertility within the region. The size of the 15-24 years and 25-44 years cohorts are small enough to suggest that there has been considerable outmigration of this group from the region.

Figure 2.4 below portrays the age sex structure of the total population at the 2006 census. While the overall shape of each group's structure is similar, there are several main differences which are due to the different population making up each population. The census shows much larger proportions of younger age cohorts than is the case with the resident ratepayers' structure. This has to be due to the fact that the census is of all inhabitants of the Copper Coast, whereas the survey has identified only ratepayers. It is to be expected that rental households will contain higher numbers of younger people, including children, than is likely to be the case in properties that are owned. The structure of the residents is more "top heavy" than that for the total population measured at the census. Again, this is because the survey selected owners, and older persons will be more heavily represented than younger persons.

Figure 2.4: Age sex structure, Copper Coast, 2006



From the data it is possible to determine the size of each household. As Table 1.19 shows, the overwhelming majority (82 percent) of resident ratepayer households comprise one or two persons. Within that group, two person households are three times more prevalent than one person households. On the other hand, large households comprising four or five persons are relatively few within the Copper Coast.

Table 2.11: Size of resident ratepayer households

Size of Household	Number	Percent
One persons	241	21.9
Two persons	661	60.2
Three persons	89	8.1
Four persons	70	6.4
Five persons	37	3.4
Total	1098	100.0

Table 2.12: Age structure by household size

Age cohort	Number of persons in household					Total
	One	Two	Three	Four	Five	
0-4	0	7	11	18	10	46
5-14	0	4	20	68	57	153
15-24	0	24	50	51	39	167
25-44	9	46	51	77	47	236
45-64	71	556	118	63	25	866
65-74	62	474	11	2	2	587
75 or >	93	208	5	1	0	328
Total	235	1319	266	280	180	2383
	Percent of cohort					
0-4	0.0	15.2	23.9	39.1	21.7	100.0
5-14	0.0	2.6	13.1	44.4	37.3	100.0
15-24	0.0	14.4	29.9	30.5	23.4	100.0
25-44	3.8	19.5	21.6	32.6	19.9	100.0
45-64	8.2	64.2	13.6	7.3	2.9	100.0
65-74	10.6	80.7	1.9	0.3	0.3	100.0
75 or >	28.4	63.4	1.5	0.3	0.0	100.0
	Percent of household					
0-4	0.0	0.5	4.1	6.4	5.6	
5-14	0.0	0.3	7.5	24.3	31.7	
15-24	0.0	1.8	18.8	18.2	21.7	
25-44	3.8	3.5	19.2	27.5	26.1	
45-64	30.2	42.2	44.4	22.5	13.9	
65-74	26.4	35.9	4.1	0.7	1.1	
75 or >	39.6	15.8	1.9	0.4	0.0	
Total	100.0	100.0	100.0	100.0	100.0	

In terms of the percentage of households of varying size within each cohort, shown in Table 2.12, there are a number of points which can be made:

- The largest proportions of young people are in the largest households
- The young working population is well represented in all households except one person households. Within these households this age group is comprised either of couples without children, or couples with one or more children. In other words, this group is split between those that have commenced the child raising cycle or who not yet commenced the process.
- The 45-64 years cohort is most concentrated in two person households.
- This tendency increases in the 65-74 years group.
- In the 75 years or older group, the highest concentrations are in one and two person households.

In considering the distribution of the age groups within each household size, the main points are:

- Older people are heavily represented in one person households, and less so in two person households
- In three person households, the highest representations are in the 45-64 years cohort (the pre retirement group), 25-44 years (young workforce) and the 15-24 years group, who may or may not be working, and who could still be at school or tertiary education of some form.
- The two largest cohorts in four person households are 25-44 years (27.5 percent) and 5-14 years (24.3 percent).

- In the largest households, the three largest cohorts are concentrated in the younger age groups, so that persons aged between 5 and 44 years represent 79.5 percent of all persons living in five person households.

The employment status of resident households is presented in Table 2.13. The largest category is the Retired (or mostly retired) group, representing nearly 40 percent of all respondents. This is a little under double the proportion of retired persons in the non resident sample. Clearly, therefore, the Copper Coast has a large component of retired persons who will make demands on specific types of services and infrastructure, and which has implications for a range of policy responses by local government. The next most significant group comprises person who are employed, either full time (21.4 percent) or part time (14.7 percent). Although these proportions are significant, they are small in terms of the proportions prevailing in the non resident ratepayer population. In that group, employed persons were 44.5 percent of the total.

This highlights a prevailing issue occurring in most regional localities – that of securing increased employment opportunities for the resident population. Initiatives which could attract extra opportunities to region would have significant impacts on the proportion of employed persons as well as the size of the population, as it would work to attract additional people into the area. The proportion of persons unemployed and looking for work is low, while the 15 percent of the population not in the labour force is likely to include a large proportion of children who are still at school.

Table 2.13: Employment status of resident ratepayer households

Status	Number	Percent
Employed FT	501	21.4
Employed PT (incl. casual)	343	14.7
Unemployed, looking for work	33	1.4
Home duties	177	7.6
Retired (or mostly retired)	930	39.8
Not in Labour Force (NILF)	354	15.1
Total	2338	100.0

Comparable information for the Copper Coast District Council at the 2006 census is shown in Table 2.14. Close perusal of the two tables show two main differences:

- Full time and part time employment, and unemployment levels, are higher in the total population than in the surveyed population
- The NILF proportion in the total population, although high at 51.5 percent, is lower than the combined NILF, retired and home duties proportion of 62.5 percent in the survey population.

The reason for this has been mentioned a number times earlier and comes down to the fact that the total population includes those living in rental accommodation, and would include higher proportions of people in the workforce and lower proportions of persons who were retired.

Table 2.14: Employment status, Copper Coast, 2006

Status	Males	Females	Total
		Number	
Employed full-time	1,477	721	2,198
Employed part-time	469	1,032	1,501
Total employed	1,946	1,753	3,699
Unemployed, looking for work	224	161	385
Total labour force	2,170	1,914	4,084
Not in the labour force	1,882	2,461	4,343
Total	4,052	4,375	8,427
		Percent	
Employed full-time	36.5	16.5	26.1
Employed part-time	11.6	23.6	17.8
Total employed	48.0	40.1	43.9
Unemployed, looking for work	5.5	3.7	4.6
Total labour force	53.6	43.7	48.5
Not in the labour force	46.4	56.3	51.5
Total	100.0	100.0	100.0

Note:
Persons away from work, persons with hours unstated and those who did not state their workforce statust have been deleted

Source: ABS, 2006 Community Profile Series, Time series profile

An analysis of the marital status of members of resident ratepayer households is shown in Table 2.15. It indicates that 67.5 percent of persons in these households are married, with and equal balance between persons either widowed or divorced. Around 17 percent have never been married, and these are most likely to represent persons aged up to 24 years.

Table 2.15: Marital status of persons in resident households

Status	Number	Percent
Married	1507	67.5
Widowed	170	7.6
Divorced	162	7.3
Never married	394	17.6
Total	2233	100.0

Comparable data for the Copper Coast population at the 2006 census is shown in Table 2.16

Table 2.16: Marital status, Copper Coast, 2006

Marital status	Males	Females	Total
		Number	
Married(a)	2,508	2,530	5,038
Separated	151	150	301
Divorced	414	427	841
Separated/divorced	565	577	1,142
Widowed	179	663	842
Never married	1,163	971	2,134
Total	4,415	4,741	9,156
		Percent	
Married	56.8	53.4	55.0
Separated	3.4	3.2	3.3
Divorced	9.4	9.0	9.2
Separated/divorced	12.8	12.2	12.5
Widowed	4.1	14.0	9.2
Never married	26.3	20.5	23.3
Total	100.0	100.0	100.0

Source: ABS, 2006 Community Profile Series, Time series profile

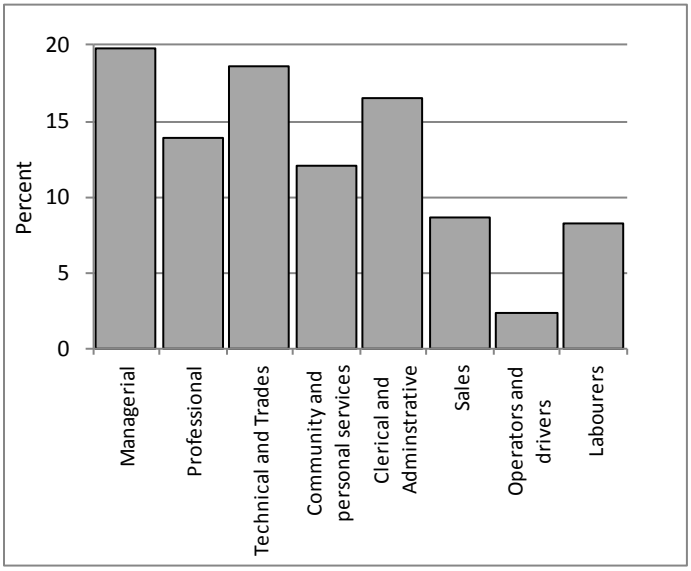
A significant demographic category within any population is its occupation structure, as this is linked to socio-economic status. Table 2.17 shows the occupation structure of the Copper Coast's resident households. About one third of the Copper Coast resident population is employed in higher economic status managerial and professional occupations. This is some 12 percent less than the numbers of non resident ratepayers employed in these types of occupations. Among the resident population, 18.6 percent had technical and trades type occupations, with a further 12 percent employed in community and personal service work. Just over one quarter of resident ratepayers had clerical and sales type jobs, while slightly more than 10 percent were employed as machinery operators, drivers and labourers.

The occupation structure of the resident ratepayer population is also shown in Figure 2.5, which is based on the data in Table 2.17.

Table 2.17: Occupational structure of employed persons in resident households

Occupation	Number	Percent
Managerial	158	19.8
Professional	111	13.9
Technical and Trades	149	18.6
Community and personal services	96	12.0
Clerical and Adminstrative	132	16.5
Sales	69	8.6
Operators and drivers	19	2.4
Labourers	66	8.3
Total	800	100.0

Figure 2.5: Occupational structure of resident ratepayers



Comparable data for the total population of the District is shown in Table 2.18 and Figure 2.6. Looking first at the occupational structure of the total population, there is an interesting gender difference between the occupations. Firstly, females outnumber males in professional, community and personal service, clerical and administrative and sales type occupations. In the others, the reverse is the case, especially in technical and trades jobs and in those related to driving and machinery operation.

Secondly, when the census data is compared with that from the residents' survey, there are several points to be made:

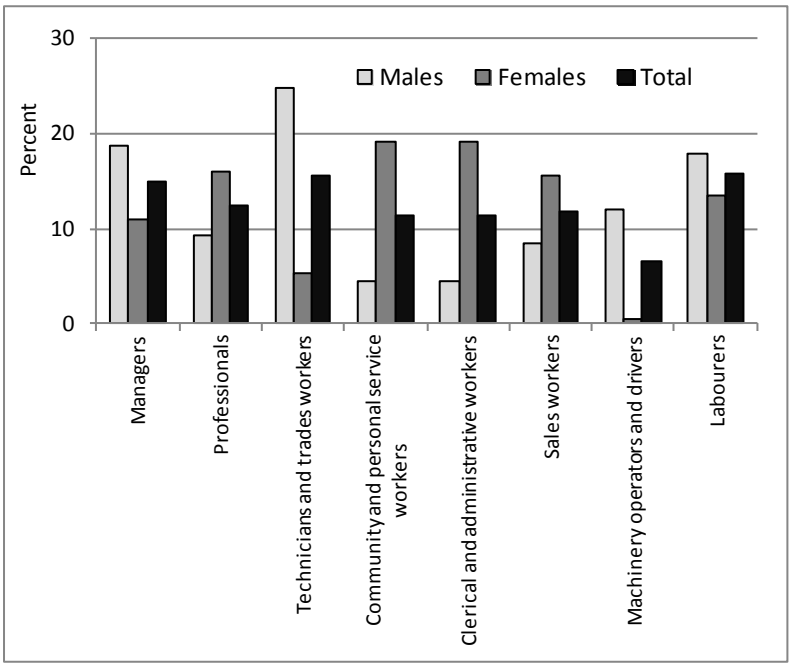
- Managerial, Technical and trades and clerical and administrative occupations have higher occurrences in the surveyed population than in the total population.
- Professional and community and personal services occupations are essentially equally represented in both groups.
- The remaining occupational categories, and generally lower paid and lower socio-economic occupations, are represented to lesser degrees in the surveyed population than in the total population.

Table 2.18: Occupational structure, Males and Females, Copper Coast, 2006

Occupational classification	Males	Females	Total
		Number	
Managers	385	204	589
Professionals	191	298	489
Technicians and trades workers(b)	511	100	611
Community and personal service workers	92	354	446
Clerical and administrative workers	92	354	446
Sales workers	173	288	461
Machinery operators and drivers	247	9	256
Labourers	370	249	619
Total	2,061	1,856	3,917
		Percent	
Managers	18.7	11.0	15.0
Professionals	9.3	16.1	12.5
Technicians and trades workers(b)	24.8	5.4	15.6
Community and personal service workers	4.5	19.1	11.4
Clerical and administrative workers	4.5	19.1	11.4
Sales workers	8.4	15.5	11.8
Machinery operators and drivers	12.0	0.5	6.5
Labourers	18.0	13.4	15.8
Total	100.0	100.0	100.0

Source: ABS, 2006 Community Profile Series, Time series profile

Figure 2.6: Occupational structure, Males and Females, Copper Coast, 2006



Where people work provides insights into the journey to work characteristics of the workforce. In Table 2.19, responses from each employed member of households have been arranged to give an indication of where the workforce works in terms of the Copper Coast and its main towns, nearby centres and more distant localities with the state and beyond.

Table 2.19: Location of employment, permanent residents

Locality/Region	Total	Percent	Locality/Region	Total	Percent
Kadina	211	44.3	*Other:*		
Wallaroo	86	18.1	Adelaide	6	1.3
Moonta (Incl Moonta Bay)	81	17.0	Port Pirie	5	1.1
Copper Coast	15	3.2	Roxby Downs	3	0.6
Pt Hughes	7	1.5	Olympic Dam	1	0.2
Nearby:			Moomba	1	0.2
Maitland	5	1.1	Whyalla	1	0.2
Paskeville	4	0.8	Port Lincoln	1	0.2
Bute	3	0.6	*State:*		
Pt Broughton	3	0.6	SA	15	3.2
Pt Wakefield	3	0.6	WA	4	0.8
Alford	2	0.4	NT	2	0.4
Ardrossan	2	0.4	Qld	1	0.2
Kulpara	2	0.4			
Arthurton	1	0.2			
Minlaton	1	0.2			
Long Plains	1	0.2			
Yorke Peninsula	9	1.9	Total	476	100.0

The most striking feature from the table is that 84 percent of employed residents work within the Copper Coast. The greatest source of employment is in Kadina (44.3 percent), while the proportions working in Wallaroo and Moonta are less than half the level reported for Kadina – at 18.1 and 17.0 percent respectively. The remainder of the workforce is employed beyond the Copper Coast, with 7.4 percent working relatively nearby to the Copper Coast, principally in Maitland, Paskeville, Bute, Port Broughton and Port Wakefield. Beyond this area, Adelaide and Port Pirie specifically are dominant, while 3.2 percent of residents stated their work location as within South Australia. The results are interesting from another perspective, viz., the number of responses for locations such as Roxby Downs, Olympic Dam, Moomba, WA, NT and Queensland. It is highly possible that these are workplace locations linked to the mining industry. In this case, it demonstrates a link between the Copper Coast and the mining industry.

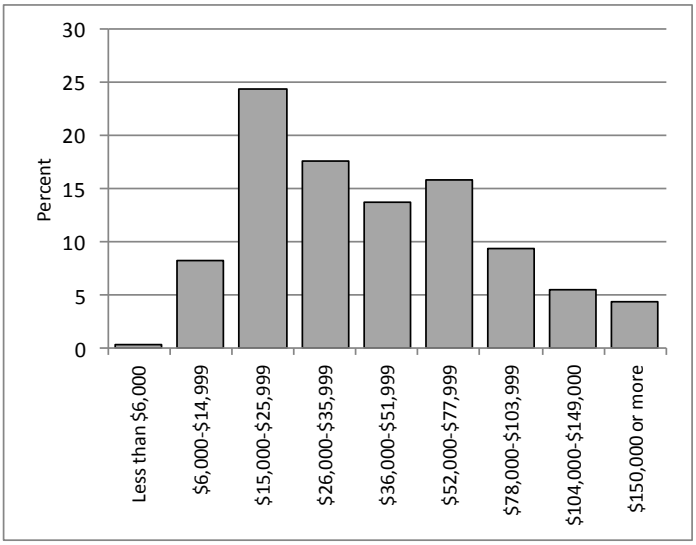
From a policy perspective, this is a matter that Council could pursue with the mining companies in terms of housing their fly in-fly out workforce. Clearly, the Copper Coast has some attractions to the mining workforce at the present time, and this attraction could be further promoted to increase the proportion of the mining industry that chooses to reside in the Copper Coast.

In Table 2.20 the income characteristics of the permanent resident population is shown. From the table, and Figure 2.7 which is derived from it, the most striking characteristic of the income structure of the resident population is that it is negatively skewed towards the lower income categories. This is in complete contrast with the income structure of the non resident population. Whereas in the resident Copper Coast population some 50.8 percent of the population have combined household incomes of less than $40,000 per annum, within the non resident population the relative percentage was 17.8 percent. The conclusion is that the Copper Coast is not a high income region, which is to be expected given the high levels of older people in the population and the relationship this has with numbers of retired persons and those not in the labour force.

Table 2.20: Income structure of resident households

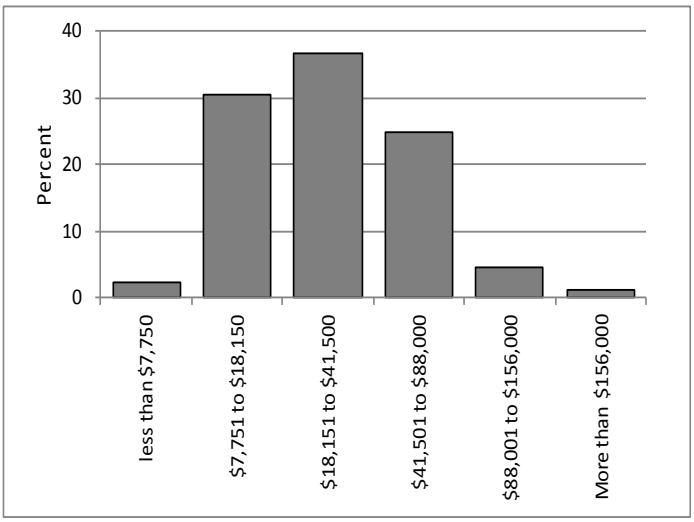
Household Income	Number	Percent
Less than $6,000	5	0.5
$6,000-$14,999	89	8.3
$15,000-$25,999	263	24.4
$26,000-$35,999	190	17.6
$36,000-$51,999	149	13.8
$52,000-$77,999	171	15.9
$78,000-$103,999	102	9.5
$104,000-$149,000	60	5.6
$150,000 or more	48	4.5
Total	1077	100.0

Figure 2.7: Income structure of resident population



The survey did not employ the same income categories as were used in presenting household income data from the 2006 census. Consequently, precise comparisons between total income for survey households and those in the total population are not possible. Despite this, Figure 2.8 shows how household income was distributed across all households in 2006. Each profile is negatively skewed – that is distorted towards the lower household incomes – but the residents' profile is more skewed than that for the total population. Again, this is to be expected because of the inclusion of renters who are more likely to be employed with higher incomes than those in the survey population where a higher proportion of older and retired people have been identified who are also likely to have lower incomes.

Figure 2.8: Household income, Copper Coast, 2006



2.1.3 Behavioural characteristics of resident ratepayers

This section presents an analysis of questions in the survey which sought an indication of the use local residents made of various local services. Respondents were asked whether they mainly used their local supermarket when shopping for food and groceries. An overwhelming 93.8 percent responded affirmatively. Table 2.21 provides an indication of the regularity with which the population shops for food and groceries in selected towns. A number of points can be made:

- Firstly, Kadina is clearly the dominant shopping town within the region, with more than 900 households indicating the extent to which they used Kadina for food and grocery shopping.
- Wallaroo and Moonta had equal numbers of respondents identifying the frequency with which they used these towns for food and groceries.
- Lesser numbers of respondents, about 58 percent of the number who provided their use frequencies for Wallaroo and Moonta, provided data on how regularly they used Maitland, Minlaton, Ardrossan and Port Broughton .
- Together, these response rates provide a qualitative assessment of the hierarchy of shopping and service centres within the Copper Coast and its environs.
- In terms of frequency of use, 57.2 percent of respondents use Kadina on a weekly basis, compared with 14.2 percent on a more frequent daily basis and 23.4 percent who use it monthly.
- In the case of Wallaroo and Moonta, just short of 40 percent of respondents use each town on a weekly basis.
- In contrast to the situation prevailing in Kadina and Wallaroo, 21.1 percent of respondents use Moonta on a daily basis for food and grocery shopping.
- Centres beyond the Copper Coast are mostly never used for food and grocery shopping – at best they are likely to be used on a yearly basis.
- Food and grocery outlets in Kadina and Wallaroo who want to increase the proportion of the population which uses their service on a daily basis, as is the case in Moonta, may need to develop strategies to achieve this end.

Table 2.21: Use of towns in the region for food and grocery shopping

Centre	Daily	Weekly	Monthly	Yearly	Never	Total
			Number			
Kadina	138	554	227	32	15	969
Wallaroo	110	296	157	76	105	744
Moonta	150	265	79	101	115	711
Maitland			6	35	376	417
Minlation			3	12	399	414
Ardrossan			3	19	395	417
Port Broughton			6	18	390	415
Other	1	4	12	19	200	236
			Percent			
Kadina	14.2	57.2	23.4	3.3	1.5	100.0
Wallaroo	14.8	39.8	21.1	10.2	14.1	100.0
Moonta	21.1	37.3	11.1	14.2	16.2	100.0
Maitland	0.0	0.0	1.4	8.4	90.2	100.0
Minlation	0.0	0.0	0.7	2.9	96.4	100.0
Ardrossan	0.0	0.0	0.7	4.6	94.7	100.0
Port Broughton	0.0	0.0	1.4	4.3	94.0	100.0
Other	0.4	1.7	5.1	8.1	84.7	100.0

Table 2.22 shows the frequency of use of the main towns in the region for food and grocery shopping by resident ratepayers, based on the town within the Copper Coast in which they live. This table expands on the previous one by adding a geographical element to residents' use of services in the region's centres.

There are a number of points that can be made about residents' shopping behaviour relative to where they live in the Copper Coast:

- 31.7 percent of Kadina residents use Kadina outlets for food and grocery items on a daily basis and two thirds use the centre on a weekly basis. Overall, Kadina residents use Kadina either on a daily or weekly basis.
- With the exception of Wallaroo, Kadina residents are unlikely to use any other centres on a daily basis for food and grocery items. While 30 percent of Kadina residents may use Wallaroo on a weekly basis, the proportion using Moonta on the same basis is only 6.6 percent, and zero for the other centres.
- The conclusion is that Kadina residents essentially use the opportunities for food and groceries buying that are provided in Kadina, with considerably less use made of nearby Wallaroo.
- About one third of Wallaroo and Wallaroo Marina residents use Wallaroo facilities on a daily basis. On a weekly basis, however, residents in these two localities divide their patronage almost equally between Wallaroo and Kadina, but not with Moonta. The tyranny of distance is at work here – Moonta is 15 kilometres away, but Kadina is just "up the road".
- North Beach Wallaroo residents also divide their loyalties between Wallaroo and Kadina.
- Very few Moonta, Moonta Bay and Port Hughes residents shop on a daily basis in Kadina or Wallaroo. And while between one third and 40 percent of these residents may do their weekly shopping in Kadina, much smaller proportions use Wallaroo at this frequency.

Table 2.22: Use of towns for grocery and food shopping by residential location

Service town	Frequency of use	Location of Copper Coast Property								
		Kadina	Wallaroo	Wallaroo Marina	North Beach Wallaroo	Moonta	Moonta Bay	Port Hughes	Paskeville	Rural/ Other
		Percentage								
Kadina	Daily	31.7	2.1	10.0	12.5	4.1	3.4	2.2	9.1	5.0
	Weekly	65.8	66.3	66.7	70.0	37.8	40.4	33.3	81.8	70.0
	Monthly	2.2	26.7	16.7	10.0	46.9	46.6	57.8	9.1	20.0
	Yearly	0.3	3.7	6.7	7.5	5.1	6.7	2.2		5.0
	Never		1.1			6.1	2.8	4.4		0.0
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Wallaroo	Daily	3.1	33.3	33.3	11.9		3.2			0.0
	Weekly	30.4	61.2	53.3	85.7	14.3	7.4	8.0	37.5	5.9
	Monthly	37.9	5.1	10.0	2.4	30.6	25.5	20.0	50.0	41.2
	Yearly	17.4	0.4	3.3		14.3	18.1	16.0	12.5	35.3
	Never	11.2				40.8	45.7	56.0		17.6
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Moonta	Daily		1.1		6.7	38.3	33.8	35.8		27.8
	Weekly	6.6	3.3	7.1	13.3	60.2	62.0	54.7	20.0	22.2
	Monthly	22.9	21.1	14.3	33.3	1.5	3.2	9.4		5.6
	Yearly	34.3	31.1	21.4	20.0		0.9		60.0	27.8
	Never	36.1	43.3	57.1	26.7				20.0	16.7
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Maitland	Daily									0.0
	Weekly									0.0
	Monthly	0.7	0.0	7.7			3.8	4.0		0.0
	Yearly	6.8	6.0		18.2	15.4	9.0	4.0	50.0	12.5
	Never	92.6	94.0	92.3	81.8	84.6	87.2	92.0	50.0	87.5
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Minlaton	Daily									
	Weekly									
	Monthly	0.7					2.5			
	Yearly	2.0	2.4		9.1	10.3	2.5			
	Never	97.3	97.6	100.0	90.9	89.7	94.9	100.0	100.0	100.0
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Ardrossan	Daily									
	Weekly									
	Monthly		1.2				2.5			
	Yearly	2.7	6.0			5.1	4.9	4.2		18.8
	Never	97.3	92.8	100.0	100.0	94.9	92.6	95.8	100.0	81.3
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Port Broughton	Daily									
	Weeky									
	Monthly	2.0	1.2				2.5			
	Yearly	4.1	3.7		9.1	7.9	5.0	4.2		
	Never	93.9	95.1	100.0	90.9	92.1	92.5	95.8	100.0	100.0
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Other	Daily		2.0							
	Weekly	1.3					2.1			22.2
	Monthly	6.6	2.0	20.0	16.7	3.6	4.2		33.3	
	Yearly	3.9	10.0	20.0	16.7	14.3	10.4			
	Never	88.2	86.0	60.0	66.7	82.1	83.3	100.0	66.7	77.8
Total		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

- More than one third of Moonta, Moonta Bay and Port Hughes residents use Moonta daily for food and groceries and around 60 percent use it on a weekly basis.
- Use of food and grocery opportunities in the other centres located nearby is at best on yearly basis. These centres have no pulling power for consumers resident in the main towns of the Copper Coast.

Residents were also asked to indicate how often they used the centres for non food household goods and clothing, as well as Adelaide and its shopping centres. As shown in Table 2.23, residents do not use the main centres for household goods and clothing at the same frequency they use them for food and grocery items. Shopping for these goods is more likely to be on a monthly basis, rather than a weekly or daily basis. Hence, 55 percent of residents use Kadina on a monthly basis for these goods, compared with 29.2 percent who use the centre on a weekly basis. For Moonta, 33 percent of residents use it on a monthly basis, compared with 18.7 percent on a weekly basis. Wallaroo is used less for household goods and clothing than the other two main centres, with just 21.9 percent using it on a monthly basis. For household goods and clothing needs, Kadina and Moonta are preferred centres, rather than Wallaroo. There may be some implications here in terms of future development of Wallaroo. It may be that this indicates a retail component that could be boosted in Wallaroo's future development, but the issue of whether a suitable threshold population exists to make these kinds of development viable is an important matter to be appraised. As for other nearby centres, they are insignificant in terms of shopping behaviour for Copper Coast residents, with up to 96 percent of residents indicating that they never use them.

Table 2.23: Use of towns in the region, Adelaide and other centres for non food household goods and clothing

Location	Daily	Weekly	Monthly	Yearly	Never	Total
			Number			
Kadina	31	303	571	121	12	1038
Wallaroo	10	98	115	90	212	525
Moonta	23	122	215	171	120	651
Maitland		1	5	32	368	406
Minlaton			1	27	374	402
Ardrossan				15	381	396
Port Broughton			2	19	371	392
Adelaide CBD		3	168	234	108	513
Adelaide Shopping Centres		11	377	326	48	762
Other		5	50	54	75	184
			Percent			
Kadina	3.0	29.2	55.0	11.7	1.2	100.0
Wallaroo	1.9	18.7	21.9	17.1	40.4	100.0
Moonta	3.5	18.7	33.0	26.3	18.4	100.0
Maitland		0.2	1.2	7.9	90.6	100.0
Minlaton			0.2	6.7	93.0	100.0
Ardrossan				3.8	96.2	100.0
Port Broughton			0.5	4.8	94.6	100.0
Adelaide CBD		0.6	32.7	45.6	21.1	100.0
Adelaide Shopping Centres		1.4	49.5	42.8	6.3	100.0
Other		2.7	27.2	29.3	40.8	100.0

As for shopping for household goods and clothing in Adelaide, the survey results indicate that residents use outlets in these locations regularly on a monthly basis. The Adelaide CBD is visited for shopping on a monthly basis by a third of residents, with a further 45.6 percent saying they visit these locations on a yearly basis. More significant is the stated use of Adelaide Shopping centres. Nearly 50 percent of Copper Coast residents use these on a monthly basis and a further 42.8 percent on a yearly basis. These centres are most likely

those located on the northern fringes of the metropolitan area, such as Elizabeth, Munno Para, Gepps Cross and Tea Tree Plaza, all of which are about an hour by car from the Copper Coast. Given that one fifth of residents never use Adelaide CBD opportunities, and only six percent indicated they never use Adelaide shopping centres, it is clear that these centres exert a significant impact on local retail activity, and certainly modify the type and range of goods that can be made available to residents by local retail activity.

Table 2.24 shows how often residents have travelled to Adelaide and a number of nearby centres. The main point from the table is that travel to Adelaide is a feature of life in the Copper Coast for a large number of residents. The proportion of persons travelling to Port Broughton and Maitland is less than half the number travelling to Adelaide, and less than one third for travel to more distant towns at Ardrossan and Minlaton. A number of additional points relating to frequency of travel between the Copper Coast and Adelaide, and several nearby towns can be made:

- 41.2 percent of residents had travelled to Adelaide less than five times during the previous six months, with a further 30 percent visiting Adelaide between five and nine times.
- In contrast, very high proportions of residents travelled to the other towns less than five times during the previous six months. In general, the further the centre from the Copper Coast the higher the proportion of residents who have only visited on less than five occasions during the previous six months.
- Of the four nearby towns, Maitland appears to be the more attractive in terms of recent visitations from Copper Coast residents.

It appears therefore that regular visits to Adelaide are accepted as a key part of living in the Copper Coast. While interaction with other nearby towns does occur, it is not at the same intensity as travel between the Copper Coast and Adelaide. An indication as to why residents travel between Adelaide and other towns in the region is presented in Table 2.25.

Table 2.24: Travel to Adelaide and nearby centres during previous six months

Destination	<5 times	5-9 times	10-14 times	15-29 times	30 or > times	Total
			Number			
Adelaide	436	318	156	107	40	1057
Port Broughton	380	35	22	13	18	468
Maitland	359	51	19	18	17	464
Ardrossan	321	31	12	9	7	380
Minlaton	239	17	6	6	3	271
			Percent			
Adelaide	41.2	30.1	14.8	10.1	3.8	100.0
Port Broughton	81.2	7.5	4.7	2.8	3.8	100.0
Maitland	77.4	11.0	4.1	3.9	3.7	100.0
Ardrossan	84.5	8.2	3.2	2.4	1.8	100.0
Minlaton	88.2	6.3	2.2	2.2	1.1	100.0

Table 2.25: Reason for travelling between Adelaide and towns close to the Copper Coast

Reason	Adelaide	Reason	Port Broughton	Maitland	Ardrossan	Minlaton
	Number		Number			
Visiting family/friends	325	Sport	79	134	137	69
Medical	324	Leisure/relaxation	125	83	65	62
Shopping	141	Work	45	65	48	40
Business	49	Visiting family/friends	78	51	36	22
Work	49	Business	10	24	14	14
Leisure/relaxation	20	Social	21	16	10	5
Hospital	16	Medical	16	13	15	5
Sport	16	Entertainment	6	12	1	1
Social	12	Shopping	5	6	4	12
Entertainment	11	Education/training	3	1	1	
Education/training	2	Hospital		1		
Other	25	Other	34	22	12	17
Total	965		388	406	331	230
			Percent			
Visiting family/friends	33.7	Sport	20.4	33.0	41.4	30.0
Medical	33.6	Leisure/relaxation	32.2	20.4	19.6	27.0
Shopping	14.6	Work	11.6	16.0	14.5	17.4
Business	5.1	Visiting family/friends	20.1	12.6	10.9	9.6
Work	5.1	Business	2.6	5.9	4.2	6.1
Leisure/relaxation	2.1	Social	5.4	3.9	3.0	2.2
Hospital	1.7	Medical	4.1	3.2	4.5	2.2
Sport	1.7	Entertainment	1.5	3.0	0.3	0.4
Social	1.2	Shopping	1.3	1.5	1.2	5.2
Entertainment	1.1	Education/training	0.8	0.2	0.3	0.0
Education/training	0.2	Hospital	0.0	0.2	0.0	0.0
Other	2.6	Other	8.8	5.4	3.6	7.4
Total	100.0		100.0	100.0	100.0	100.0

The table is in two parts to highlight the different reasons for travel to Adelaide, compared with the reasons given for travel to the other towns in the adjacent area. There are two equally dominant reasons for travel to Adelaide – visiting relatives and friends and for medical purposes. The first reason highlights the fact that the Copper Coast comprises a substantial "migrant" population of people who previously lived in Adelaide before moving to the Copper Coast either to retire or to work. The second reason highlights the absence of specialist medical services in rural areas. A third reason has been alluded to earlier – 14 percent of residents travel to Adelaide for shopping purposes. Significantly, the reason why more than 80 percent of Copper Coast residents travel to Adelaide is for visiting friends and relatives, medical or shopping purposes.

On the other hand, the reasons for travelling to nearby towns are totally different from the reasons for travelling to Adelaide. Hence, with the exception of travel to Port Broughton, the most dominant reason for travelling to Maitland, Ardrossan and Minlaton is specifically for sport. Further, more than 50 percent of respondents indicated that their main reasons for travel to these four centres was sport or leisure/relaxation related. Work related reasons were more significant for travel between these centres than it was for travel to Adelaide.

What is significant here is that there are different motivations for travelling to Adelaide and to other nearby centres. Travel to Adelaide is related to personal, health and specialised

shopping, while travel to adjacent towns is driven by sporting, leisure and economic (work) reasons.

There are many services available within the three major towns of the Copper Coast, and respondents were asked to indicate which available services they used and the extent to which these services met their total needs for that service. Table 2.26 below shows the most used services within these towns, as well as how much these services meet the demands of residents. Some key points from the table are:

- More than 1000 respondents use local doctor, pharmacy, post office, supermarket, service station and banking services.
- Significantly large numbers also use local trades, clothing and footwear, car repair, hospital, hotel, restaurant and dental services.
- Services that do not provide more than 90 percent of residents with 70 percent or more of their needs are clothing and footwear, hospitals, and hotels and restaurants.

The main point that the table makes is that there is a sizeable number of services available within the Copper Coast which are presently being used by residents. Some are being accessed in greater numbers than others. Those activities with lower numbers accessing them are generally more specialist services related to specific health issues. Significantly, these services, although not accessed by many residents, are meeting more than 70 percent of respondents needs for the significant majority of users.

All communities offer their residents a range of sporting and recreational facilities. Table 2.27 indicates the number of residents who use the various sporting and recreational facilities provided in the Copper Coast. The most popular activities make use of the area's coastal location, so that more than half the respondents engaged in fishing (19.1 percent), swimming (13.8) and boating (11.5). A further 1.6 percent actively participated in sailing. Lawn bowls and fitness activities engaged a further 20 percent of respondents.

Table 2.26: Use of services available in the Copper Coast

Service	<10 percent	10-19 percent	20-49 percent	50-59 percent	60-69 percent	70 or > percent	Total
			Number				
Doctor	9	7	13	47	15	1012	1103
Pharmacy	7	8	21	25	4	1031	1096
Post office	2	1	8	13	4	1046	1074
Food supplies (supermarket)		2	8	15	3	1033	1061
Service station	1	8	24	56	15	925	1029
Bank	6	13	11	41	5	932	1008
Trades	5	11	18	17	5	864	920
Clothing, footwear etc	7	16	107	185	33	521	869
Car repairs	4	13	15	37	3	771	843
Hospital	13	27	23	70	7	651	791
Hotel	11	23	33	52	14	647	780
Restaurant	15	29	54	71	15	478	662
Dentist	6	6	9	32	2	605	660
Physiotherapist	3	4	6	11	1	239	264
Chiropractor	2	7	4	4	1	238	256
Podiatry	3	2	1	6		243	255
Immunisation	1	3	4	5		221	234
Aged care assessment		4	2	4		92	102
Adult mental health	1	2	2	6		58	69
Acupuncture	1					53	54
Child/Infant health		2		6		44	52
Naturopath	1	2	2	3		32	40
Social worker			3	3	1	29	36
Child/adolescence mental health	2	1		3		12	18
Child speech therapy						15	15
			Number				
Doctor	0.8	0.6	1.2	4.3	1.4	91.7	100.0
Pharmacy	0.6	0.7	1.9	2.3	0.4	94.1	100.0
Post office	0.2	0.1	0.7	1.2	0.4	97.4	100.0
Food supplies (supermarket)		0.2	0.8	1.4	0.3	97.4	100.0
Service station	0.1	0.8	2.3	5.4	1.5	89.9	100.0
Bank	0.6	1.3	1.1	4.1	0.5	92.5	100.0
Trades	0.5	1.2	2.0	1.8	0.5	93.9	100.0
Clothing, footwear etc	0.8	1.8	12.3	21.3	3.8	60.0	100.0
Car repairs	0.5	1.5	1.8	4.4	0.4	91.5	100.0
Hospital	1.6	3.4	2.9	8.8	0.9	82.3	100.0
Hotel	1.4	2.9	4.2	6.7	1.8	82.9	100.0
Restaurant	2.3	4.4	8.2	10.7	2.3	72.2	100.0
Dentist	0.9	0.9	1.4	4.8	0.3	91.7	100.0
Physiotherapist	1.1	1.5	2.3	4.2	0.4	90.5	100.0
Chiropractor	0.8	2.7	1.6	1.6	0.4	93.0	100.0
Podiatry	1.2	0.8	0.4	2.4		95.3	100.0
Immunisation	0.4	1.3	1.7	2.1		94.4	100.0
Aged care assessment		3.9	2.0	3.9		90.2	100.0
Adult mental health	1.4	2.9	2.9	8.7		84.1	100.0
Acupuncture	1.9					98.1	100.0
Child/Infant health	0.0	3.8	0.0	11.5		84.6	100.0
Naturopath	2.5	5.0	5.0	7.5		80.0	100.0
Social worker			8.3	8.3	2.8	80.6	100.0
Child/adolescence mental health	11.1	5.6		16.7		66.7	100.0
Child speech therapy						100.0	100.0

Table 2.27: Resident use of sport and recreation activities in the Copper Coast

Sport/recreational activity	Number	Percent
Fishing	431	19.1
Swimming	310	13.8
Boating	260	11.5
Lawn bowls	234	10.4
Fitness	228	10.1
Golf	170	7.5
Football	95	4.2
Netball	87	3.9
Basketball	82	3.6
Cricket	53	2.4
Tennis	51	2.3
Sailing	36	1.6
Soccer	11	0.5
Other	206	9.1
Total	2254	100.0

The survey also asked whether any household members were members of any non sporting club. Just over forty percent of residents were members of non sporting clubs within the community. A corollary question asked residents whether they were members of any voluntary community groups, such as Meals on Wheels and Lions. The results of this question are presented in Table 2.28.

Table 2.28: Membership of voluntary community groups

Community group	Number	Percent
Hospital based organisations	80	14.7
Meals on Wheels	75	13.7
Rural based organisations	73	13.4
Red Cross, Salvation Army, RFDS, Sea Rescue, Anglicare, Lifeline etc	72	13.2
Service Clubs	54	9.9
Church based organisations	47	8.6
Neighbourhood Watch, Progress Associations, Men's sheds	31	5.7
Sporting clubs	14	2.6
School based organisations	13	2.4
RSL	8	1.5
Other	79	14.5
Total	546	100.0

The most striking result from the table is the proportion of residents involved in their local hospital. This may reflect the demand that the population places on hospitals, as a result of the age structure of the community, but it also emphasises the importance of local hospitals as a community issue. The proportion of persons involved in Meals on Wheels is also a reflection of the age of the community and the importance of services established to meet specific needs.

Takeaway food outlets and restaurants are a feature of most communities. The survey sought to gauge residents' use of these establishments within the Copper Coast. Just over 80 percent of all respondents indicated patronage of both takeaway food outlets and restaurants within the region, at levels ranging from daily to rarely. The frequency of residents' use of these services is shown graphically in Figure 2.9, and in detail in Table 2.29.

Figure 2.9: Takeaway meals and eating out in the Copper Coast

Table 2.29: Takeaway meals and eating out in the Copper Coast

Frequency	Takeaway meals		Restaurant meals	
	Number	Percent	Number	Percent
Daily	4	0.4	1	0.1
More than once per week	31	3.1	18	1.8
Weekly	159	15.7	111	11.3
Fortnightly	149	14.7	135	13.7
Monthly	199	19.7	194	19.7
Special occasions	184	18.2	385	39.0
Rarely	223	22.1	103	10.4
Never	62	6.1	39	4.0
Total	1011	100.0	986	100.0

The following points relating to takeaway food outlet patronage can be made:

- Few residents use these outlets on a daily basis, or for that matter, more than once per week
- 15.7 percent of residents patronise takeaway outlets weekly, compared with 11.3 percent who use restaurant services on a weekly basis
- Both meal options have similar patronage for use on a fortnightly and monthly frequency, with higher proportions of residents using them on a monthly basis than on a fortnightly basis.
- Restaurants are used more for special occasions than are takeaway outlets, while restaurants are more likely to be used rarely than are takeaway food outlets.
- Only a small proportion of residents, between four and six percent never use these either of these eating options.

Respondents were asked to indicate the most favourable and least favourable aspects of the Copper Coast, as well as any local issues which concerned them. Table 2.30 shows respondents view of the most favourable aspects of the Copper Coast. For residents, lifestyle and beaches ranked first and second as the most favourable aspects of the Copper Coast. For non residents the ranking were reversed, which is understandable because non residents are most likely to be attracted by the beaches in the first instance, while the lifestyle is what is likely to cause them to move eventually to the region. Rankings notwithstanding, around 46 percent of residents and non residents stated lifestyle and the regions coast and beaches as

their most favourable aspects of the Copper Coast. These aspects are the Copper Coast's greatest assets, enjoyed by its residents, making the Copper Coast a place where outsiders purchase holiday homes, with many deciding to make a permanent move to the region, and which cause day tripper tourists to pour into the area, adding much to the local economy.

Table 2.30: Most favourable aspects of Copper Coast

Aspect	Number	Percent
Lifestyle	415	24.3
Coasts/beaches	397	23.2
Quiet/peaceful	140	8.2
Closeness to Adelaide	140	8.2
The people/friendly	135	7.9
Facilities/hotels/restaurants	132	7.7
Climate/weather	123	7.2
Location/holiday destination	99	5.8
Fishing	38	2.2
History/charm/nice towns	30	1.8
Retirement location	3	0.2
Housing/land costs	2	0.1
Holiday destinantion	2	0.1
Other	52	3.0
Total	1708	100.0

In contrast, Table 2.31 lists the least favourable aspects of the Copper Coast in the eyes of its residents. There are clear implications for the District Council of the Copper Coast in relation to many of these comments from the resident ratepayer base, especially in terms of roads, aspects of Council, and parks and gardens. The state of the district's roads is the most prominent aspect generating unfavourable responses. Roads generated more than two times the responses for the second rank least favourable aspect, viz., aspects of Council and its perceived operation. Nearly ten percent of residents have a grievance related to certain retail services within the district. The dilemma here for authorities is the relationship between certain services and the threshold population needed to ensure the viability of these services should they be established. Nevertheless, these are issues to which local businesses may need to respond, especially the issue of weekend trading hours. Some six percent of residents indicated that they had difficulty in making medical appointments which suited them.

In Table 2.32 below, these unfavourable aspects have been cross tabulated by the suburb in which respondents lived. The benefit of this is that it allows any localisation of issues to be identified, which may assist in addressing any discontent on the part of ratepayers. The four main aspects of discontent identified in Table 2.31 were roads, aspects of council, limited retail choice and maintenance of parks, gardens and footpaths. From the section of Table 2.32 showing row percentages, the distribution of the issue across the Council area can be seen. The main points are:

- The greatest concern about roads is located in Moonta Bay, Kadina and Wallaroo.
- Just over 30 percent of residents with concerns about Council are located in Kadina, with a little over one fifth in each of Moonta Bay and Wallaroo
- The greatest concerns about retail opportunities are in Wallaroo (27 percent), Kadina (22.2 percent) and Moonta Bay (19.8 percent).
- In terms of maintenance of parks and footpaths, 26.3 percent are located in Moonta Bay, just over a quarter in Kadina and 23.7 percent in Wallaroo.

Table 2.31: Least favourable aspects of Copper Coast

Aspect	Number	Percent
Roads	411	30.6
Aspects of Council	182	13.5
Limited retail choice, postal delivery, Saturday trading	126	9.4
Poor maintenance of parks, gardens, footpaths, allotments	118	8.8
Difficulty making medical appointments	79	5.9
Tourists!!	46	3.4
Employment opportunities	35	2.6
Swimming pool	34	2.5
Upgrading in other towns	26	1.9
Distance from Adelaide	25	1.9
Sewerage, rubbish collection, dump issues, improved green waste disposal	24	1.8
Cycling, walking tracks	13	1.0
Aspects of harvest season	12	0.9
Negativism	9	0.7
Boat ramps/congestion	8	0.6
Disability access	5	0.4
Invasion of big retail chains	4	0.3
Speed limits	2	0.1
Other	185	13.8
Total	1344	100.0

The section of Table 2.32 showing column percentages identifies the key issues concerning residents located in each of the localities of the Copper Coast. The clear result of this analysis is that the state of roads is the most pressing concern held by residents in each of the localities. The highest proportion of residents concerned about roads is 37.2 percent in Moonta Bay, while the lowest is 20 percent in Wallaroo Marina. Aspects of council ranked second among residents in Kadina, Wallaroo, Moonta, Moonta Bay and Port Hughes. In most localities, however, this issue was much less significant that the issue of roads. Limited retail choice ranked second for Wallaroo North Beach residents, and was a key issue for residents in Wallaroo Marina and Wallaroo.

A complementary question asked residents whether there were any local issues that concerned them, and its results are shown in Table 2.33. The dominant issues relate to roads and footpath maintenance, along with accessibility to council by ratepayers. Other issues of less concern to ratepayers are associated with rubbish, sewerage and stormwater disposal, upgrading of infrastructure in Wallaroo and Moonta, and matters related to country hospitals in general and their staffing levels.

For any period of time, in any community, people arrive and depart. The difference between the two streams represents either net population growth or net population decline for the community. The survey has provided considerable evidence explaining why residents have moved into the Copper Coast region. It also sought to determine some of the reasons that might cause current residents to leave the area.

Table 2.33: Local issues of concern to residents

Issue	Number	Percent
Roads/footpath maintenance	234	29.9
Council accessibility/transparency/response to ratepayers	202	25.8
Rubbish dumping/sewerage issues/stormwater issues	47	6.0
Wallaroo/Moonta upgrading	41	5.2
Country hospitals/expansion/closure threats/staffing	40	5.1
Police resources	29	3.7
Swimming pool/ten pin bowling/other recreation facilities	29	3.7
Uneven spending throughout district	18	2.3
Roadside clearing/drains/parks and gardens	16	2.0
Youth activities	14	1.8
Aged cared availability/infrastructure	12	1.5
Port Hughes boat ramp	12	1.5
Employment opportunities	10	1.3
Walking trails and cycle tracks	7	0.9
Increased business support	2	0.3
Kindergarten and after school facilities	2	0.3
Other	67	8.6
Total	782	100.0

Table 2.34 shows how each of the reasons are distributed among each of the persons in households:

- For Persons 1 and 2, who are usually the head of household and his/her spouse/partner, death and illness are the main factors that could cause people to leave the district. Less significant reasons relate to employment or loss of driver's licence.
- For persons 3, 4 and 5, who are usually other members of the household, the dominant reasons for leaving the area are employment and study. Persons in this group are clearly younger than those in the first group.

It is not possible to derive an indication of the number of people that could move from the area based on these reasons. The data in Table 2.35 below does provide some guide to the number of people that might leave the district for any of the reasons stated. It is the result of a cross tabulation of all Persons 1, 2, 3, 4 and 5 by the reasons that might cause these persons to leave the district. The total population in the table is the number of Person 1s, 2s, 3s, 4s and 5s in the survey. While not every person has provided an indication of what might cause them to leave the area, it is the case that respondents could identify one or more reasons which might cause them to leave the Copper Coast. Despite the caveats, there are a number of points that emerge from Table 2.35:

- Death or illness could cause around a fifth of persons 1 and 2 to leave the district. Hence, up to 400 people could be lost from these causes. There is no time frame on when this loss would occur, but it does provide some quantification of the role of death and illness on outmigration.
- For Persons 1 and 2, licence loss and employment are less significant factors, but nevertheless it can be argued that these factors could cause a loss of around ten percent of the total population of Persons 1 and 2, or close to 200 persons.
- In the case of Persons 3, 4 and 5, the more critical reasons for their leaving the district are employment and study. These factors could impact on this population by between 30 and 50 percent. Although surveyed numbers in this group are low, totalling 341, the impact in actual numbers could be between 110 and 170. These data are confirmation of the situation in the Copper Coast which is well documented in the

internal migration data – that employment and education are factors capable of stripping large numbers of youth from rural communities.

Table 2.32: Least favourable aspects by location within the Copper Coast

Aspect	Kadina	Wallaroo	Wallaroo Marina	North Beach Wallaroo	Moonta	Moonta Bay	Port Hughes	Paskeville	Rural/ Other	Total
	Number									
Roads	108	88	8	12	51	115	19	3	7	411
Boat ramps, congestion	0	0	0	0	1	3	4	0	0	8
Cycling/walking tracks	7	1	0	0	1	1	2	1	0	13
Aspects of harvest season	6	3	0	0	1	2	0	0	0	12
Aspects of Council	55	41	8	4	22	38	9	1	4	182
Swimming pool	17	3	0	3	3	6	1	0	1	34
Distance from Adelaide	11	5	2	1	1	5	0	0	0	25
Speed limits	2	0	0	0	0	0	0	0	0	2
Sewerage, rubbish collection, dump issues, improved green waste disposal	3	2	0	0	5	10	2	1	1	24
Upgrading in other towns	4	8	5	0	1	5	2	0	1	26
Limited retail choice, postal delivery, Saturday trading	28	34	7	10	12	25	8	1	1	126
Invasion of big retail chains	3	0	0	1	0	0	0	0	0	4
Negativism	4	2	0	0	2	0	0	1	0	9
Poor maintenance of parks, gardens, footpaths, allotments	30	28	3	4	16	31	5	0	1	118
Employment opportunities	15	8	1	0	5	4	1	0	1	35
Tourists	8	10	0	2	11	8	5	1	1	46
Disability access	4	1	0	0	0	0	0	0	0	5
Difficulty making medical appointments	16	8	1	4	12	27	9	0	2	79
Other	58	48	5	9	22	29	7	2	5	185
Total	379	290	40	50	166	309	74	11	25	1344
	Row percentage (distribution of issue across locations)									
Roads	26.3	21.4	1.9	2.9	12.4	28.0	4.6	0.7	1.7	100.0
Boat ramps, congestion	0.0	0.0	0.0	0.0	12.5	37.5	50.0	0.0	0.0	100.0
Cycling/walking tracks	53.8	7.7	0.0	0.0	7.7	7.7	15.4	7.7	0.0	100.0
Aspects of harvest season	50.0	25.0	0.0	0.0	8.3	16.7	0.0	0.0	0.0	100.0
Aspects of Council	30.2	22.5	4.4	2.2	12.1	20.9	4.9	0.5	2.2	100.0
Swimming pool	50.0	8.8	0.0	8.8	8.8	17.6	2.9	0.0	2.9	100.0
Distance from Adelaide	44.0	20.0	8.0	4.0	4.0	20.0	0.0	0.0	0.0	100.0
Speed limits	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0
Sewerage, rubbish collection, dump issues, improved green waste disposal	12.5	8.3	0.0	0.0	20.8	41.7	8.3	4.2	4.2	100.0
Upgrading in other towns	15.4	30.8	19.2	0.0	3.8	19.2	7.7	0.0	3.8	100.0
Limited retail choice, postal delivery, Saturday trading	22.2	27.0	5.6	7.9	9.5	19.8	6.3	0.8	0.8	100.0
Invasion of big retail chains	75.0	0.0	0.0	25.0	0.0	0.0	0.0	0.0	0.0	100.0
Negativism	44.4	22.2	0.0	0.0	22.2	0.0	0.0	11.1	0.0	100.0
Poor maintenance of parks, gardens, footpaths, allotments	25.4	23.7	2.5	3.4	13.6	26.3	4.2	0.0	0.8	100.0
Employment opportunities	42.9	22.9	2.9	0.0	14.3	11.4	2.9	0.0	2.9	100.0
Tourists	17.4	21.7	0.0	4.3	23.9	17.4	10.9	2.2	2.2	100.0
Disability access	80.0	20.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0
Difficulty making medical appointments	20.3	10.1	1.3	5.1	15.2	34.2	11.4	0.0	2.5	100.0
Other	31.4	25.9	2.7	4.9	11.9	15.7	3.8	1.1	2.7	100.0
	Column percentage (distribution of issues within locations)									
Roads	28.5	30.3	20.0	24.0	30.7	37.2	25.7	27.3	28.0	
Boat ramps, congestion	0.0	0.0	0.0	0.0	0.6	1.0	5.4	0.0	0.0	
Cycling/walking tracks	1.8	0.3	0.0	0.0	0.6	0.3	2.7	9.1	0.0	
Aspects of harvest season	1.6	1.0	0.0	0.0	0.6	0.6	0.0	0.0	0.0	
Aspects of Council	14.5	14.1	20.0	8.0	13.3	12.3	12.2	9.1	16.0	
Swimming pool	4.5	1.0	0.0	6.0	1.8	1.9	1.4	0.0	4.0	
Distance from Adelaide	2.9	1.7	5.0	2.0	0.6	1.6	0.0	0.0	0.0	
Speed limits	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Sewerage, rubbish collection, dump issues, improved green waste disposal	0.8	0.7	0.0	0.0	3.0	3.2	2.7	9.1	4.0	
Upgrading in other towns	1.1	2.8	12.5	0.0	0.6	1.6	2.7	0.0	4.0	
Limited retail choice, postal delivery, Saturday trading	7.4	11.7	17.5	20.0	7.2	8.1	10.8	9.1	4.0	
Invasion of big retail chains	0.8	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	
Negativism	1.1	0.7	0.0	0.0	1.2	0.0	0.0	9.1	0.0	
Poor maintenance of parks, gardens, footpaths, allotments	7.9	9.7	7.5	8.0	9.6	10.0	6.8	0.0	4.0	
Employment opportunities	4.0	2.8	2.5	0.0	3.0	1.3	1.4	0.0	4.0	
Tourists	2.1	3.4	0.0	4.0	6.6	2.6	6.8	9.1	4.0	
Disability access	1.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Difficulty making medical appointments	4.2	2.8	2.5	8.0	7.2	8.7	12.2	0.0	8.0	
Other	15.3	16.6	12.5	18.0	13.3	9.4	9.5	18.2	20.0	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

Table 2.33: Local issues of concern to residents

Issue	Number	Percent
Roads/footpath maintenance	234	29.9
Council accessibility/transparency/response to ratepayers	202	25.8
Rubbish dumping/sewerage issues/stormwater issues	47	6.0
Wallaroo/Moonta upgrading	41	5.2
Country hospitals/expansion/closure threats/staffing	40	5.1
Police resources	29	3.7
Swimming pool/ten pin bowling/other recreation facilities	29	3.7
Uneven spending throughout district	18	2.3
Roadside clearing/drains/parks and gardens	16	2.0
Youth activities	14	1.8
Aged cared availability/infrastructure	12	1.5
Port Hughes boat ramp	12	1.5
Employment opportunities	10	1.3
Walking trails and cycle tracks	7	0.9
Increased business support	2	0.3
Kindergarten and after school facilities	2	0.3
Other	67	8.6
Total	782	100.0

Table 2.34: Reasons for leaving the Copper Coast

Reason	Person1	Person 2	Person 3	Person 4	Person 5
			Number		
Death	234	215	11	6	3
Illness	308	205	21	8	4
Licence Loss	123	65	6	1	1
Employment	157	117	84	41	9
Study	27	25	84	60	20
Other	113	40	4	1	1
Total	962	667	210	117	38
			Percent		
Death	24.3	32.2	5.2	5.1	7.9
Illness	32.0	30.7	10.0	6.8	10.5
Licence Loss	12.8	9.7	2.9	0.9	2.6
Employment	16.3	17.5	40.0	35.0	23.7
Study	2.8	3.7	40.0	51.3	52.6
Other	11.7	6.0	1.9	0.9	2.6
Total	100.0	100.0	100.0	100.0	100.0

Table 2.35: Reasons for leaving the district by total population

Reason	Person 1	Person 2	Person 3	Person 4	Person 5
			Number		
Death	222	205	8	5	3
Illness	288	196	17	8	4
Licence loss	118	65	5	1	1
Employment	149	115	76	38	9
Study	26	23	74	53	20
Total population	1097	857	196	108	37
			Percent		
Death	20.2	23.9	4.1	4.6	8.1
Illness	26.3	22.9	8.7	7.4	10.8
Licence loss	10.8	7.6	2.6	0.9	2.7
Employment	13.6	13.4	38.8	35.2	24.3
Study	2.4	2.7	37.8	49.1	54.1

Within rural communities, transport is a major problem due mainly to an imbalance between demand and cost to provide the service. Small rural communities can rarely generate the demand to make service provision either viable by the private sector, or regular. As a result, local government is often under pressure to provide subsidised transport. The survey indicated that one quarter of respondents made use of non private transport opportunities within the area. The type of non private transport used is shown in Table 2.36.

Table 2.36: Residents use of non private transport in the Copper Coast

Non private transport	Number	Percent
Taxi	120	40.0
HACC supported transport	56	18.7
Community bus	49	16.3
Private bus	29	9.7
Other	46	15.3
Total	300	100.0

Taxis are more than twice as popular as HACC (Home and Community Care) supported transport, and nearly 2.5 times more used than the community bus. It would seem that use of the community bus could be more popular, and it is likely that a review of a number of aspects of its current operation may yield ways by which this became a more used transport mode within the area. The relatively low patronage of private bus services is most likely a combined result of cost and timetabling. And yet, 50.8 percent of respondents indicated that they would use public transport within the Copper Coast if it were provided.

In the survey, 44 percent of respondents provided some comments relating to public transport in the Copper Coast. Details of their responses are shown in Table 2.37. Many people are concerned about their access to Adelaide, and in particular the regularity of this service, while a similar number is simply disgruntled with public transport provision in the area. These views could be resolved with an overhaul of public transport arrangements in the area, but it will involve a cost to both local government and individual users. At best, this is problematic and therefore remains an issue with which local authorities will need to continually grapple.

Table 2.37: Attitudes to public transport in the Copper Coast

Comment	Number	Percent
Lack of service to Adelaide/regular service needed	148	28.5
Non existent	135	26.0
Services need to cater for low income and older people	91	17.5
Taxis expensive	26	5.0
Inadequate timetable	13	2.5
Other	107	20.6
Total	520	100.0

2.1.4 Summary

1. Within the District Council of Copper Coast, more than 96 percent of ratepayers own their home, with more than 84 percent of these having three or more bedrooms. Just on three quarters of ratepayers own their home outright.
2. A quarter of residents have always lived in the District, and of the remainder, more than half are relatively new to the area, having moved into the Copper Coast since 2000.
3. Once in the district, households do not necessarily remain at the same location from thereon. The survey has shown that the longer a household has been in the district, the less likely they are to be currently in their original dwelling. For example, only

16.3 percent of pre 1960 households remain in their current dwelling, but 63.6 percent of households arriving in the period 1990-1999 remain in their original dwelling. It means that in the Copper Coast, as in most other locations, households generate a housing career, as they move from one dwelling to another usually in response to changed household circumstances, such as size of family, adjustment occasioned by the ageing process, downsizing and/or release of equity from their home to finance other priorities.

4. The distribution of residents prior to their moving to the Copper Coast is not unlike the location of non resident ratepayers. Most came from within South Australia, with large numbers previously living relatively close to the Copper Coast, be it in the Yorke Peninsula region, the mid North, or the towns of the iron triangle.
5. There are four main reasons why permanent residents moved to the Cooper Coast. Lifestyle and environment was the most significant reasons, with employment or business reasons ranked next. Retirement and family reasons rounded off the main reasons for moving to the Copper Coast. Financial and investment reasons were not as prominent as they were for non resident ratepayers.
6. There is clearly an "attractiveness" to the region, and this is a characteristic that needs to be promoted in terms of encouraging further growth in the area.
7. Couple households are predominant among ratepayers, and within this group couples without children are more prevalent than those with children. When lone person households are considered, more than three quarters of resident ratepayer households comprise families without children. Single parent and lone person households are underrepresented in the survey because many of these households are likely to be renters and accordingly not included in the survey. The extent of differences between the survey population and the total population due to the district's population living in rented accommodation can often be gauged by comparative tables derived from the 2006 census of population and housing, which have been presented as part of the documentation for this chapter.
8. The balance between males and females in the survey population is close, with females slightly outnumbering males. This is to be expected in rural populations which have relatively high numbers of persons in the pre-retirement, young-old and old-old age groups. Accordingly, the age sex structure of the ratepayer population is relatively "top heavy", with age cohorts beyond 44 years being significantly larger than those younger than 45 years. In the total population, some of these differences are reduced, so that there are greater proportions of people in the younger age groups and lesser proportions in the older age groups.
9. There is a clear relationship between household size and the representation of age groups within them. Generally, the larger households are comprised of younger people than smaller households.
10. In terms of employment status, the largest category is the Retired (or mostly retired) group, representing nearly 40 percent of all respondents. This is a little under double the proportion of retired persons in the non resident sample. This is a group which will make demands on specific types of services and infrastructure, and which has implications for a range of policy responses by local government. Persons employed either full time or part time represent 36 percent of the ratepayer population. In the non resident ratepayer group, employed persons were 44.5 percent of the total. The difference points to a prevailing issue occurring in most regional localities – that of securing increased employment opportunities for the resident population. Initiatives which could attract extra opportunities to region would have significant impacts on

the proportion of employed persons as well as the size of the population, as it would work to attract additional people into the area.

11. A significant demographic category within any population is its occupation structure, as this is linked to socio-economic status. In comparing the survey data with data from the 2006 census, several contrasting points can be made:
    - Managerial, Technical and trades and clerical and administrative occupations have higher occurrences in the surveyed population than in the total population.
    - Professional and community and personal services occupations are essentially equally represented in both groups.
    - The remaining occupational categories, and generally lower paid and lower socio-economic occupations, are represented to lesser degrees in the surveyed population than in the total population.
12. Most ratepayers (84 percent) are employed within the Copper Coast. Of these, 44 percent work in Kadina, 18 percent in Wallaroo and 17 percent in Moonta. About seven percent work nearby to the Copper Coast.
13. There is evidence that some of the other workplace locations of the resident population are linked to the mining industry. If this demonstrates a link between the Copper Coast and the mining industry, then from a policy perspective this is a matter that Council could pursue with the mining companies in terms of housing their fly in-fly out workforce.
14. Clearly, the Copper Coast presently has some attractions to the mining workforce and this attraction could be further promoted to increase the proportion of the mining industry that chooses to reside in the Copper Coast.
15. The income structure of the resident population is negatively skewed towards the lower income categories, in contrast with that of the non resident population. Based on its ratepayer population, the Copper Coast is not a high income region, which is to be expected given the high levels of older people in the population and the relationship this has with numbers of retired persons and those not in the labour force. Data from the census confirms the negative skewness of income within the total population, but the level of skew is not as pronounced as that within the ratepayer group. Again, this is to be expected because of the inclusion of renters who are more likely to be employed and have higher incomes than those in the survey population.
16. A key objective of the survey was to assess certain aspects of ratepayer behaviours and preferences. Kadina is clearly the dominant shopping town within the region. Fifty seven percent of residents use Kadina on a weekly basis compared with 40 percent who use Wallaroo and Moonta at the same frequency. Centres beyond the Copper Triangle are rarely used for food and grocery shopping. Residents do not use the main centres for household goods and clothing at the same frequency they use them for food and grocery items – more likely monthly than daily or weekly. The Adelaide CBD is visited for shopping on a monthly basis by a third of residents, and more significantly nearly 50 percent of Copper Coast residents use Adelaide shopping centres on a monthly basis. These centres are most likely those located on the northern fringes of the metropolitan area, such as Elizabeth, Munno Para, Gepps Cross and Tea Tree Plaza, all of which are about an hour by car from the Copper Coast. Travel to Adelaide is a feature of life in the Copper Coast for a large number of residents. While interaction occurs with other nearby towns does occur, it is not at the same intensity as travel between the Copper Coast and Adelaide.
17. There are two dominant reasons for travel to Adelaide – visiting relatives and friends and for medical purposes. The first reason highlights the fact that the Copper Coast

comprises a substantial "migrant" population of people who previously lived in Adelaide before moving to the Copper Coast either to retire or to work. The second reason highlights the absence of specialist medical services in rural areas. A third reason also exists – travelling to Adelaide for shopping purposes. Significantly, these three reasons explain why more than 80 percent of Copper Coast residents travel to Adelaide.

18. The above notwithstanding, there is a sizeable number of services available within the Copper Coast which are presently being used by residents. Some are accessed in greater numbers than others. The activities with lower numbers accessing them are generally more specialist services related to specific health issues. Significantly though, these services are meeting more than 70 percent of respondents' needs for the significant majority of users.
19. Services that do not provide more than 90 percent of residents with 70 percent or more of their needs are clothing and footwear, hospitals, and hotels and restaurants
20. Takeaway food outlets and restaurants are a feature of most communities. Just over 80 percent of all respondents indicated patronage of both takeaway food outlets and restaurants within the region, at levels ranging from daily to rarely. Some 15 percent of residents patronise takeaway outlets weekly, compared with 11 percent who use restaurant services on a weekly basis. Both meal options have similar patronage for use on a fortnightly and monthly frequency, with higher proportions of residents using them on a monthly basis than on a fortnightly basis. Restaurants are used more for special occasions than are takeaway outlets.
21. The final part of the survey asked residents to indicate favourable and least favourable aspects of the Copper Coast, as well as to indicate issues that were currently concerning them. Lifestyle and beaches ranked first and second as the most favourable aspects of the Copper Coast. These aspects are the Copper Coast's greatest assets, enjoyed by its residents, making the Copper Coast a place where outsiders purchase holiday homes, with many deciding to make a permanent move to the region, and which cause day tripper tourists to pour into the area, adding much to the local economy.
22. There are clear implications for the District Council of the Copper Coast in relation to what ratepayers find unfavourable about the District. Many of the comments from residents relate to roads, aspects of Council, and parks and gardens and level of retail services.
23. The state of the district's roads is the most prominent aspect generating unfavourable responses. Roads generated more than two times the responses for the second rank least favourable aspect, viz., aspects of Council and its perceived operation.
24. To enable Council to better understand the impacts and implications of these grievances, the study has cross tabulated their occurrence by the locality from which the grievance emanated. The clear result of this analysis is that the state of roads is the most pressing concern held by residents in each of the localities.
25. A complementary question asked residents about any local issues that concerned them. The dominant issues relate to roads and footpath maintenance, along with accessibility to council by ratepayers.
26. Other issues of less concern to ratepayers were associated with rubbish, sewerage and stormwater disposal, upgrading of infrastructure in Wallaroo and Moonta, and matters related to country hospitals in general and their staffing levels.
27. Nearly ten percent of residents have a grievance related to certain retail services within the district. The dilemma here for authorities is the relationship between certain services and the threshold population needed to ensure the viability of these

services should they be established. Nevertheless, these are issues to which local businesses may need to respond, especially the issue of weekend trading hours.

28. The greatest concerns about retail opportunities are in Wallaroo, Kadina and Moonta Bay.
29. In addition to seeking some reasons why residents move into the Copper Coast, the survey also sought to establish some factors that might cause existing residents to leave the area. The significance of various reasons for leaving the district depended on which person in any household was responding to the question. For example, for Persons 1 and 2 in any household, death and illness were the main factors that could cause people to leave the district. Less significant reasons related to employment or loss of driver's licence. However, for persons 3, 4 and 5, the dominant reasons for leaving the area were employment and study.
30. In the survey, 44 percent of respondents provided some comments relating to public transport in the Copper Coast. There is a clear concern within the District about accessibility to Adelaide by public transport and the regularity of existing services between the Copper Coast and Adelaide. For a range of reasons this is a problematic issue for local authorities.

2.1.5 Recommendations and suggestions

- The survey has shown that only a quarter of residents have always lived in the district, and of the remainder, more than half have arrived since 2000. These in migrants have been attracted to the area, and Council can ensure that its attractiveness is maintained an enhanced by ensuring that new housing is attractive, affordable and has an aesthetic which works to make people want to move to locations within the Copper Coast. It has also been shown that considerable residential mobility occurs within the Copper Coast. A proportion of this will comprise housing downsizing as the owners move through the various stages of the ageing process. Policy, planning and approval process within Council can encourage the establishment of housing suitable for this demographic, and will also serve to attract retirees from outside the district.
- The Districts age structure is "top" heavy. Persons older than 44 years predominate. Future growth in the Council area will mostly comprise older persons. This is not going to change and Council can work for it to become an asset of the District. Promoting the development of retirement villages can be seen in the same light as the establishment of housing development centred on a golf course.
- In the resident ratepayer survey, 36 percent of the population was employed full time or part time. This is a prevailing issue in regional locations, in evidence since the 1970s. Structural change has seen employment opportunities receding from areas, and replacement opportunities have been difficult to attract. This does, however, remain an issue for Council policy makers and planners.
- There is some evidence that at least a part of the resident population works in the State's mining industry. Expansion of mining activity is a significant plank in the State's economic development programme. In terms of policy initiative, this is an area that Council could pursue with mining companies in terms of housing their fly in fly out workforce. It's an aspect of employment that seems set to expand in the future. OZ Minerals presently flies it Prominent Hill workforce into site from both Adelaide airport and Port Augusta airport.
- As well there is considerable exploration by Rex Minerals presently occurring in the central Yorke Peninsula area, with claims that ongoing drilling has suggested a

deposit only slightly smaller than those at Olympic Dam and Mt Isa[2]. Should this exploration result in commercial mining production, the opportunity for a drive in drive out workforce will develop, and the Copper Coast is nicely positioned to house this new workforce.

- The survey sought information on aspects of ratepayer behaviours and preferences. Kadina is the dominant shopping town in the region, compared with Wallaroo and Moonta. Council policy and investors need to be aware of this dominance. Decisions to encourage or locate any commercial activity in any of the three main towns need to take account of consumer behaviour and their impact on threshold populations needed to make any enterprise viable. A major feature of consumer behaviour in the Copper Coast is that travel to Adelaide is a feature of life in the Copper Coast. The main reasons for making the journey to Adelaide are to visit friends and relatives and for specialist, in the main, medical services. Council can do little to alleviate the extent of travel for the first reason, but could investigate means by which travel to Adelaide for specialist medical services could be reduced. This would require some research into the types of services sought in Adelaide, along with discussions with service providers to determine what they would require to establish services in the region. The existing hospitals are the ideal locations to establish these types of services, and their introduction would have a spin off effect on other activities in these towns.
- Residents were asked to indicate their likes and dislikes about the area. The likes typically relate to the Copper Coasts greatest assets. Council can make much of these in any marketing designed to promote the region and its localities. The issue of dislikes raises other options for Council. Most dislikes relate to roads, parks and gardens, level of retail services, and the Council itself. On the matter of roads and parks and gardens, Council can only work within its budget. But, perhaps it better convey these facts to ratepayers. How is a task for the policy makers within Council, because it is in their interest to assuage ratepayers on matters that concern them. The survey has provided the evidence – Council needs to determine the means by which the level of uneasiness can be reduced.
- Ratepayers' main dislikes around retail service related to limited choice, postal deliveries and Saturday trading. Many these relate to decisions providers have taken in considering the economics of their activity. As such, Council is restricted in its approach to these issues. In relation to Saturday trading, especially in terms of accommodating tourist trade, perhaps there is a case to promote the virtues of this to traders.
- Aspects of Council itself and its perceived operation is an important issue for Council. Councillors, in particular, can provide initiatives on how to address this. Council administrators should also be responding to the ratepayer sentiments. Once the issues are understood, means to reduce the concerns can be introduced. These results from the survey present, perhaps, one of the greatest challenges for Council in terms of policy initiatives and their implementation.
- Finally, there is clear concern among resident ratepayers about public transport to Adelaide, and its frequency. This is a problematic issue for local government, because the service is provided by private organisations whose activities are related to supply and demand. Nevertheless, Council could look at this problem to determine whether it is absolutely unable to aid any changes, or whether there are some changes that it could facilitate.

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[2] "Copper find excites Rex", Herald Sun, 29 July 2010.

Appendix 1: Non resident ratepayers survey – January 2012

THE UNIVERSITY of ADELAIDE

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Survey of Non resident ratepayers of Copper Coast - January 2012

The National Centre for Social Applications of Geographical Information Systems (GISCA) is located at the University of Adelaide, and is headed by Professor Graeme Hugo. Professor Hugo is undertaking a survey of non resident rate payers of the Copper Coast to seek information which may improve the services Council offers to you as a ratepayer, and provide data to respond to important population changes that are likely to occur in the future. As a result, we are seeking your assistance in completing the accompanying survey. For this survey, non resident ratepayers have been identified as persons whose rates notice is sent to an address outside the Copper Coast. We would expect the questionnaire to take 15 to 25 minutes to complete, and on completion we would ask that it be forwarded to Professor Hugo at the University of Adelaide in the reply paid envelope provided.

We assure you that your responses will be absolutely anonymous, and in the Report prepared by Professor Hugo, no individuals will be identified. Further, none of your address details or other ratepayer information has been provided to GISCA. In returning your completed questionnaire to the University of Adelaide, you can be assured that Council does not become privy to any of the responses provided by you. GISCA would like to advise that by completing and returning this questionnaire you agree to be part of this research.

Your responses will be treated with complete confidence, and used by Professor Hugo and his team to prepare a report for Council.

In the questionnaire, all questions should be answered, giving attention to any instructions that may be provided. For some questions, depending on your answer, your **next** question may not be the question that follows immediately. For example, if you answer "Yes" to a question the next question you are directed to may be different from the question you are directed to if you were to answer "No".

If you have any questions, please contact Dr Kevin Harris, University of Adelaide, Phone 08 8303 3973, or email him at <kevin.harris@adelaide.edu.au>

We hope that you will participate in the survey, and we thank you in anticipation. Please return the completed survey form in the replay paid envelope no later than **FRIDAY 17th FEBRUARY 2012**.

Survey of Non resident ratepayers of Copper Coast - January 2012

1. Do you own more than one property in the Copper Coast Local Government Area?

   ☐ No. Go to Question 2
   ☐ Yes. Please go to Question 2 and answer it, and the remaining questions, in relation to the Copper Coast property you use the most

2. In which suburb/town within the Copper Coast do you have a house in?

   ☐ Kadina ☐ Wallaroo ☐ Moonta ☐ Paskeville ☐ Rural/Other

3. Which description best suits your housing:

- ☐ House
- ☐ Flat/apartment
- ☐ Other (please state) _____

4. How many bedrooms does your property in the Copper Coast have? _____

5. Is your Copper Coast dwelling:

- ☐ Fully owned (that is, mortgage free)
- ☐ Being purchased (that is, you have a mortgage)
- ☐ Other (please state) _____

6. In which year did you purchase your Copper Coast dwelling? _____

7. Because your rate notice is not sent to a Copper Coast address, it is assumed that your Copper Coast property is not your permanent address. Is this correct?

- ☐ Yes. Go to Question 8
- ☐ No. Go to Question 10

8. Please state the post code of your permanent address _____

9. Please indicate how much time you spend at the Copper Coast property in an average year, for example, “no time”, “every weekend”, “three months in summer”, “school holidays” etc).

_____

_____

_____

10. What were your main reasons for choosing to purchase your Copper Coast property?

_____

_____

_____

11. Do you rent out your Copper Coast property?

☐ No ☐ Fully rented
☐ Occasionally ☐ Other (please state)
☐ Long term _____

12. Do you have any plans to subdivide this property at any stage in the future?

☐ Yes ☐ No

13. Do you have any plans to upgrade your Copper Coast property in the future?

☐ No. Go to Question 15
☐ Yes. Go to Question 14

14. Please indicate the nature of your plans to upgrade:

_____

_____

_____

15. Do you plan to make a permanent move to the Copper Coast?

☐ No. Go to Question 19
☐ Yes. Go to question 16

16. When is it likely that you would make such a move?

☐ Within two years from now
☐ Between two and five years time from now
☐ Between five and ten years from now
☐ Don't know

17. Including you, how many family members are likely to make this move? _____

18. Please indicate the number of children living with you in each of the school defined groupings and the type of school attended.

Grouping	**Number of children:**	**Type of school attended:**	
		Government school	**Non-government school**
Pre-school			
Primary school			
Secondary school			
Tertiary study			
Working or looking for work			

19. Which of the following best describes the family status of your household?

- ☐ Couple without children
- ☐ Couple with children
- ☐ Single parent
- ☐ Lone person
- ☐ Other (please state) _____

20. This question seeks some information relating to you (Person 1), and other persons living with you.

	Person 1	Person 2	Person 3	Person 4	Person 5
Sex Enter M or F for each person					
Sex					
Age (Years) ✓one age group only for each person					
0-4					
5-14					
15-24					
25-44					
45-64					
65-74					
75+					
Employment ✓one employment category only for each person					
Employed full-time					
Employed part-time (including casual)					
Unemployed and looking for work)					
Home duties					
Retired, or mostly retired)					
Not in the labour force					
Other (please state)					
Present marital status ***✓one status category only for each person***					
Married					
Widowed					
Divorced					
Never married					

21. In the box below, please provide details for each person who was defined as "employed full time or part time" in Question 20 above.

	Person 1	Person 2	Person 3	Person 4	Person 5
Occupation (for example, Teacher, Driver, Manager)					
Location of employment (Please state)					
Type of Transport to Work (Please ✓ one option)					
Car (as driver)					
Car (as passenger)					
Taxi					
Public transport					
Other (Please state)					
Journey to work					
Distance (in kilometres) to work?					
Time (in minutes) to work?					

22. Please indicate into which category your annual household income falls. Include all sources of income (salary, Centrelink/Veterans Affairs, investment) for **all** household members.

- ☐ Less than $6,000
- ☐ $6,000-$14,999
- ☐ $15,000-$25,999
- ☐ $26,000-$35,999
- ☐ $36,000-$51,999
- ☐ $52,000-$77,999
- ☐ $78,000-$103,999
- ☐ $104,000-$149,999
- ☐ $150,000 or more

23. In your visits to the Copper Coast do you purchase your food and provisions (Please √ one box):

- ☐ All in the Copper Coast
- ☐ Most in the Copper Coast
- ☐ Half in the Copper Coast
- ☐ Most at home
- ☐ All at home

24. When you are in the Copper Coast, how often do you shop for food and groceries in the following towns?

	Exclusively	**Usually**	**Often**	**Rarely**	**Never**
Use a √ to indicate frequency					
Kadina					
Wallaroo					
Moonta					
Maitland					
Minlaton					
Ardrossan					
Port Broughton					
Other					

25. If shopping for non-food household goods/clothing when you are in the Copper Coast, how often do you use the following locations?

	Exclusively	**Usually**	**Often**	**Rarely**	**Never**
Use a √ to indicate frequency					
Kadina					
Wallaroo					
Moonta					
Maitland					
Minlaton					
Ardrossan					
Port Broughton					

26. While staying in the Copper Coast, if you or your family need specialist medical services, would you:

- ☐ See someone locally
- ☐ Return home to your normal provider
- ☐ Attend a hospital in the Copper Coast
- ☐ Go elsewhere (Please state) _____

27. Are there any particular health services not provided in the Copper Coast which you or your family require, or would like to see established? (Please state)

_____

_____

28. Do you or any member of your household currently make use of any of the sport/recreation activities shown in the box below?

Sporting/recreation activity	**√ if "Yes"**	**Sporting/recreation activity**	**√ if "Yes"**
Cricket		Lawn bowls	
Football (Australian rules)		Fitness	
Soccer		Fishing	
Basketball		Swimming	
Netball		Sailing	
Tennis		Boating	
Golf		Others (Please state) _____	

29. Are you, or any member of your household, a member of any voluntary community group (such as Meals on Wheels, Lions etc)?

☐ Yes, please state: _____

☐ No

30. Do you buy takeaway meals or eat out while in the Copper Coast?

Frequency	**Takeaway meals**	**Restaurant meals**
	√ one box	**√ one box**
Daily		
More than once a week		
Once a week		
Once a fortnight		
Once a month		
On special occasions		
Rarely		
Never		

31. What do you consider to be the most favourable aspects of the Copper Coast?

_____

_____

_____

32. What do you consider to be the least favourable aspects of the Copper Coast?

_____

_____

_____

33. Please can you raise any other local issues that concern you?

_____

_____

_____

THANKYOU VERY MUCH FOR YOUR VALUABLE INPUT.

PLEASE USE THE REPLY PAID ENVELOPE TO RETURN THE SURVEY TO THE UNIVERSITY OF ADELAIDE NO LATER THAN
FRIDAY 17TH FEBRUARY 2012

Appendix 2: Resident rate payer survey – January 2012

THE UNIVERSITY of ADELAIDE

Survey of permanent residents of Copper Coast - January 2012

The National Centre for Social Applications of Geographical Information Systems (GISCA) is located at the University of Adelaide, and is headed by Professor Graeme Hugo. Professor Hugo is undertaking a survey of permanent resident rate payers of the Copper Coast to seek information which may improve the services Council offers to you as a ratepayer, and provide data to respond to important population changes that are likely to occur in the future. As a result, we are seeking your assistance in completing the accompanying survey. We would expect the questionnaire to take 15 to 25 minutes to complete, and on completion we would ask that it be forwarded to Professor Hugo at the University of Adelaide in the reply paid envelope provided.

We assure you that your responses will be absolutely anonymous, and in the Report prepared by Professor Hugo, no individuals will be identified. Further, none of your address details or other ratepayer information has been provided to GISCA. In returning your completed questionnaire to the University of Adelaide, you can be assured that Council does not become privy to any of the responses provided by you. GISCA would like to advise that by completing and returning this questionnaire you agree to be part of this research.

Your responses will be treated with complete confidence, and used by Professor Hugo and his team to prepare a report for Council.

In the questionnaire, all questions should be answered, giving attention to any instructions that may be provided. For some questions, depending on your answer, your **next** question may not be the question that follows immediately. For example, if you answer "Yes" to a question the next question you are directed to may be different from the question you are directed to if you were to answer "No".

If you have any questions, please contact Dr Kevin Harris, University of Adelaide, Phone 08 8303 3973, or email him at <kevin.harris@adelaide.edu.au>

We hope that you will participate in the survey, and we thank you in anticipation. Please return the completed survey form in the reply paid envelope no later than **FRIDAY 17TH FEBRUARY 2012.**

Survey of permanent residents of Copper Coast - January 2012

1. In which suburb/town within the Council area do you live?

   ☐ Kadina ☐ Moonta Bay
   ☐ Wallaroo ☐ Port Hughes
   ☐ Wallaroo Marina ☐ Paskeville
   ☐ North Beach Wallaroo ☐ Rural/Other
   ☐ Moonta

2. Which description best suits your housing:

   ☐ House
   ☐ Flat/apartment
   ☐ Other (please state) _____

3. How many bedrooms does your current housing have? _____

4. Is your current dwelling:

☐ Fully owned (that is, mortgage free)

☐ Being purchased (that is, you have a mortgage)

☐ Other (please state) _____

5. Have you always lived in the Copper Coast?

☐ Yes, Go to Question 10

☐ No, Go to Question 6

6. When did you first move into the Copper Coast? _____ Year

7. In which year did you move into this dwelling? _____

8. Before moving to the Copper Coast, where did you live?

Suburb/Town _____ State _____ Post Code _____ Country (if not within Australia) _____

9. What were your main reasons for choosing to live within the Copper Coast?

_____

_____

_____

10. Which of the following best describes the family status of your household?

☐ Couple without children ☐ Lone person

☐ Couple with children ☐ Other (please state) _____

☐ Single parent

11. This question seeks some information relating to you (Person 1), and any other persons living with you (Persons 2-5).

	Person 1	Person 2	Person 3	Person 4	Person 5
Sex Enter M or F for each person					
Sex					
Age (Years) ✓one age group only for each person					
0-4					
5-14					
15-24					
25-44					
45-64					
65-74					
75+					
Employment ✓one employment category only for each person					
Employed full-time					
Employed part-time (including casual)					
Unemployed and looking for work					
Home duties					
Retired, or mostly retired					
Not in the labour force					
Present marital status ***✓one status category only for each person***					
Married					
Widowed					
Divorced					
Never married					

12. In the box below, please give occupation details for each person who was defined as "employed in Question 11 above.

	Person 1	Person 2	Person 3	Person 4	Person 5
Occupation (for example, Teacher, Driver, Manager)					
Location of employment (Please state)					
Type of Transport to Work (Please ✓ one option)					
Car (as driver)					
Car (as passenger)					
Taxi					
Other (Please state)					
Journey to work					
Distance (in kilometres) to work?					
Time (in minutes) to work?					

13. Please indicate into which category your annual household income falls. Include all sources of income (salary, Centrelink/Veterans Affairs, investment) for **all** household members.

- ☐ Less than $6,000
- ☐ $6,000-$14,999
- ☐ $15,000-$25,999
- ☐ $26,000-$35,999
- ☐ $36,000-$51,999
- ☐ $52,000-$77,999
- ☐ $78,000-$103,999
- ☐ $104,000-$149,999
- ☐ $150,000 or more

14. When shopping for food and groceries do you mainly use your local supermarket?

☐ Yes ☐ No

15. How often do you shop for food and groceries in the following towns?

	Daily	**Weekly**	**Monthly**	**Yearly**	**Never**
Kadina					
Wallaroo					
Moonta					
Maitland					
Minlaton					
Ardrossan					
Port Broughton					
Other					

16. When shopping for non-food household goods/clothing, how often do you use the following locations?

	Daily	**Weekly**	**Monthly**	**Yearly**	**Never**
Locally					
Kadina					
Wallaroo					
Moonta					
Maitland					
Minlaton					
Ardrossan					
Port Broughton					
Adelaide:					
Central Business District					
Shopping centres					
Other					

17. In the box below please provide details of recent travel to the listed centres

	Adelaide	**Port Broughton**	**Maitland**	**Ardrossan**	**Minlaton**
How many times in the last 6 months have you travelled to these towns?					
What were your main reasons for travelling to these centres? (please state)					

18. In the box below, please indicate which of the services located in Kadina, Wallaroo or Moonta you and/or members of your household use.

Service	**Use? Yes/No**	**If "Yes", what Proportion of your total need for these services is met by local providers? (Percent)**	**Service**	**Use? Yes/No**	**If "Yes", what Proportion of your total need for these services is met by local providers? (Percent)**
Doctor			Social worker		
Hospital			Children's speech therapy		
Pharmacy			Aged care assessment		
Dentist			Bank		
Physiotherapy			Post office		
Podiatrist			Clothing, footwear etc		
Chiropractor			Food supplies (supermarkets)		
Acupuncture			Hotel		
Immunisation services			Restaurants		
Naturopath			Service station		
Child/infant health			Car repairers		
Child/adolescent mental health			Trades (Plumber, electrician, builders)		
Adult mental health					

19. Do you, or any members of your household, actively participate in any of the sport and recreation activities listed below?

Sport/recreation	**√ if "Yes"**	**Sport/recreation**	**√ if "Yes"**
Cricket		Lawn bowls	
Football (Australian rules)		Fitness	
Soccer		Fishing	
Basketball		Swimming	
Netball		Sailing	
Tennis		Boating	
Golf		Others (Please state) _____	

20. Are you, or any member of your household, a member of any non sporting club?

☐ Yes

☐ No

21. Are you, or any member of your household, a member of any voluntary community group (such as Meals on Wheels, Lions etc)?

☐ Yes, please state: _____

☐ No

22. Do you buy takeaway meals or eat out in the Copper Coast?

Frequency	**Takeaway meals**	**Restaurant meals**
	√ one box	**√ one box**
Daily		
More than once a week		
Once a week		
Once a fortnight		
Once a month		
On special occasions		
Rarely		
Never		

23. What do you consider to be the most favourable aspects of the Copper Coast?

_____

_____

_____

24. What do you consider to be the least favourable aspects of the Copper Coast?

_____

_____

_____

25. For you (as Person 1) and other members of your household (Persons 2-5), is there anything that would cause you/them to leave the Copper Coast?

	Person 1	Person 2	Person 3	Person 4	Person 5
	Please indicate with a ✓ or brief statement				
Death of spouse/partner					
Illness					
Loss of driver's licence					
Employment					
Study					
Other, please state					

26. Do you use any non-private transport to move about the Copper Coast?

- ☐ Taxi
- ☐ Home and Community Care (HACC) supported transport
- ☐ Private bus
- ☐ Community bus
- ☐ Other, please state _____

27. Would you use public transport within Copper Coast if it were provided?

- ☐ Yes
- ☐ No
- ☐ Other, please state_____

28. Do you have any comments relating to public transport in the Copper Coast?

_____

_____

_____

29. Are there any local issues that concern you?

_____

_____

_____

THANKYOU VERY MUCH FOR YOUR VALUABLE INPUT.

PLEASE USE THE REPLY PAID ENVELOPE TO RETURN THE SURVEY TO THE UNIVERSITY OF ADELAIDE NO LATER THAN FRIDAY 17TH FEBRUARY 2012