

Copper Coast
Economic
Development &
Marketing Plan

Parallax Design
Evans+Ayers

Precious Time



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Executive Summary

The Copper Coast Council is aiming to better understand the dynamics that have and will deliver growth, development and prosperity to the region; and to develop a plan that communicates these qualities to drive visitation, expenditure, investment and development.

Copper Coast Economic Development & Marketing Plan

Executive Summary

1. RDA Yorke + Mid North Region, Copper Coast Council Area Economic Review (ID, the population experts).
2. South Australian Tourism Commission, National Visitor Survey March 2018.
3. Australian Bureau of Statistics, Populations by Age and Sex, Regions of Australia 2015 SA.

Regional Status

The Copper Coast Council area is at the northern end of South Australia's Yorke Peninsula and was established in 1996 with the merger of the Kadina, Wallaroo and Moonta Councils. The regional economy is based on agriculture, tourism and health. The region boasts a family friendly coast line, rich cultural heritage, a central medical hub and consistent farming production.

Regional Performance

The population at merger was 10,473 and has grown to 14,295 in 2017, delivering a gross regional product of \$545 million through agriculture (\$110m), retail (\$85m), health (\$55), and tourism (\$200m) primarily, with government and other goods and services contributing \$100m¹.

Since merger the region's population has grown an average of 1.51% per annum, whilst tourism grew 6% in the twelve months ending March 2018² driven by intrastate 'visiting family and friends' travel from Adelaide, its northern suburbs and within the region itself.

The Copper Coast population has a significant and increased aged element with close to a third of the population over 65, with this percentage forecast to increase 1% every five years out to 2031.³

Regional Offering

The Copper Coast is a centre for agriculture on the Yorke Peninsula, a significant destination for intrastate travel and an emerging retirement centre. It boasts rich cultural heritage associated with mining in the late 19th and early 20th century, sweeping family friendly beaches, myriad fishing opportunities and produces some of the nation's finest broad acre crops and seafood.

Regional Potential

The Copper Coast possesses significant opportunity to grow and develop over the next 10 to 20 years with steadily growing population, a consistent and strong base economy, attractive tourism offerings and sound community infrastructure, however, to realise the region's potential the community must pro-actively and positively work together in both the private and public realms.

Regional Goals

The Copper Coast Council's vision for the region is for it to be 'South Australia's lifestyle location of choice to live and visit' and it aims to deliver well-being, sustainability and prosperity through economic development, leadership and opportunity provision. These key guidelines provide a framework around which annual and strategic planning is undertaken, however they are not quantified in concise and focused targets or goals.

Recommendations

The recommendations in this report are underpinned by three primary principles or understandings. The first is that the leadership and delivery of regional economic growth will come from a collaborative interaction between the community and commercial interests, not from Council. The second is that the greatest return will be generated by encouraging current visitation to stay longer and spend more rather than pursuing higher visitation numbers, and lastly, what gets measured gets done.

Introduction

The project to produce an Economic Development and Marketing Plan for the Copper Coast region began with an affinity for the region through over twenty years of holidaying with family and friends in Moonta Bay and surrounds, a briefing from the Council, research and a series of conversations with local residents, business operators and community leaders.

Copper Coast Economic Development & Marketing Plan

Introduction

Precious Time —A State of Mind —A Way of Thinking —A Call to Action

Throughout this introduction the opportunity inherent in the region revealed itself willingly as did the timeliness of this project and the recommendations it delivers; whilst at the same time a small but present spirit of negativity weaved its way repeatedly through the regional narrative.

Early on in the project a working title 'Precious Time' was introduced. This was based on the concepts of saving, spending, seeing and importantly securing 'precious time' for the region, through the delivery of services and support; maximising time spent with family; ensuring care and support in retirement; maintaining and leveraging cultural heritage and planning for a prosperous and sustainable future.

As the project progressed and understanding and awareness developed the initial concept of 'precious time' that led to the title, evolved into it needing to be; a state of mind; a way of thinking and a call to action.

The successful implementation of the Economic and Marketing Plan detailed in this report will require willing, active, and collaborative leadership from the community, its people, its businesses and its governance, to ensure the desired well-being, sustainability and prosperity outcomes are realised.



Credit: Callum Jackson

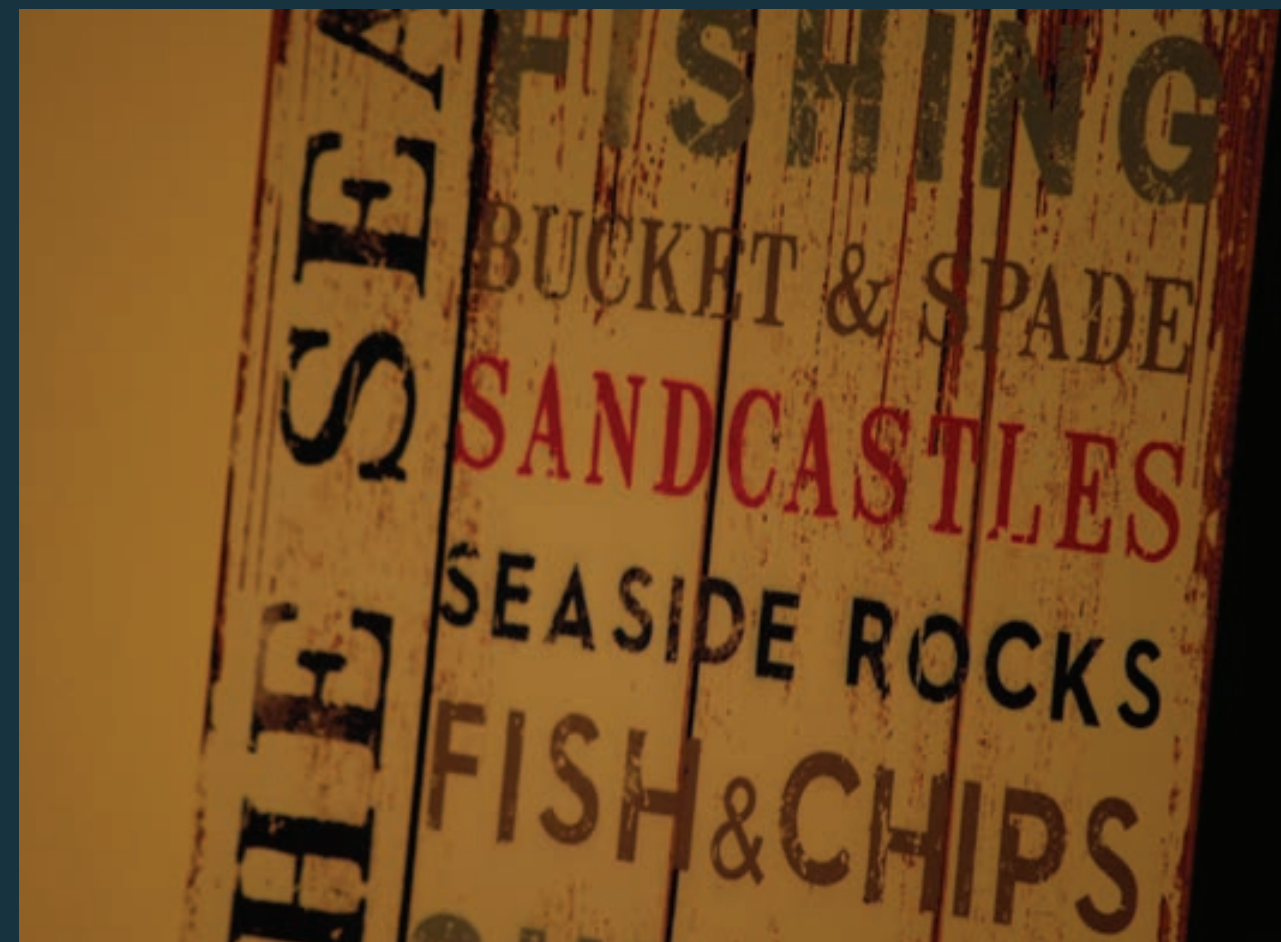
Copper Coast Economic Development & Marketing Plan

Introduction

Open communication and positive collaboration will facilitate development and lead to common good. It is this common good that needs to be understood and valued by the community, without it the region's ability to achieve its potential will be perpetually limited and restrained by the small but weighty anchor of insular and narrow-minded negativity.

Now is the time, the 'precious time' to come together with a collaborative state of mind, a cooperative way of thinking and a compelling call to action to deliver a common good and to ensure the qualities and offerings of the region are valued by its residents and demanded in markets across the state, the nation and ultimately around the world.

We commend to you this plan and look forward to working with you to achieve the goals it sets.



Copper Coast Economic Development & Marketing Plan

Introduction

The Project Team

Matthew Remphrey
Parallax Design

Marc Allgrove
Evans + Ayers

Roberto Cardone
Evans + Ayers

Scope

The Economic Development and Marketing Plan will be used by the Copper Coast Council and the community to guide them towards achieving their vision for the region to be ‘South Australia’s lifestyle location of choice to live and visit.’

The project identifies and prioritises the qualities and assets of the region, understanding the markets to which they are relevant and recommends ways to leverage their status and contribution to deliver prosperity and sustainability. This includes opportunities presented by the region’s three centres, Moonta, Kadina and Wallaroo and their environs, including landscapes, experiences and businesses.

The report includes a high-level review of the region’s current status, identifies opportunities to pursue and provides direction for investment, development and communication strategies to attain them. A specific budget for the implementation of the marketing plan was provided by the Copper Coast Council, all other actions proposed in the plan require Council priority agreement and subsequent detailed evaluation, planning and budgeting which are beyond the scope of this document.

Process

The Economic Development and Marketing Plan was produced through informed and comprehensive analysis of existing data, relevant gap analysis, stakeholder engagement, retail knowledge, creative thinking, plus industry, business management and regional development experience.

Copper Coast Economic Development & Marketing Plan

Introduction

Development Schedule + Contributors

27th July 2018

Project Launch/Briefing in Kadina

— Council members, CEO Peter Harder

July — October

Research + Interviews

— Ben Howard

*(CEO Monopoly Developments,
Wallaroo Shores)*

— Lisa Robertson

*(Chair, Kadina CBD,
Chamber of Commerce)*

— Neil Sawley

(CEO, Kadina Medical Associates)

— Scott Lintern

(CFO, Drakes Supermarkets)

— Neil Windsor

(Rate payers association)

— Stephen Stock

(Moonta Mines Heritage Trust)

— Craig Costello

(Wallaroo Marina Apartments)

— Kristen Colliver

(Nook + Nourish, Moonta)

— Nicola Adams

*(Redwing Farmstay, Miners Couch,
Moonta)*

— Peter Murray

(Moonta Progress Community)

— Jo Freund

(Taste of York, Moonta)

— Mike Newton

(SAPOL, Kadina)

— Jo Buchanan

*(Regional Development Authority,
Moonta)*

— Brooke Liebelt

(Yorke Peninsula Tourism)

— Seb Packer

(Proprietor, Tree Climb, Adelaide)

— Judy Magarey

*(Acting Head of Nursing,
University of Adelaide)*

— Rachael West

(University of Adelaide)

— John Carragher

(Agriculture, University of Adelaide)

— Dr Irina Santiago Brown

*(Author, Sustainable Australia
Winegrowing)*

— Brad Higgins

(Westpac, State Manager)

— Kieran Purcell

(Macquarie, State Manager)

— Daniel Fisk

(Clean Seas)

— Adam Stanford

(Strategy + Insights Manager, SATC)

— Roseanne Healy

*(Deputy Chair, Grains Research
Development Corporation)*

— Graham Marsh

(Graham Marsh Golf Design)

— Richard Chamberlain

(Richard Chamberlain Golf Design)

— Tony Love

(Advertiser journalist, food + wine)

— Michelle Bain

(Yondah Beach House)

— Helen Edwards

(SATC Regional Development Strategy)

— Country Health SA,

Wallaroo Hospital Taskforce

— Derek + Nicole Mathewman

(CU at Wallaroo)

Copper Coast Economic Development & Marketing Plan

Introduction

4th — 6th September 2018

3-day Region Visit — Market Visit, Industry Reviews & Interviews

— Heritage

*Stephen Stock, Mike Austin,
Shirley Eales, Graham Hancock
(Moonta Mines)*

— Food + Beverage

*Kirsten (Nook + Nourish, Moonta),
Pam (Café Mia, Wallaroo),
David (Smelter, Wallaroo),
Jo Freund (Taste the Yorke, Moonta)*

— Seafood

*Mark Crocker (Port Hughes Store),
Barry Whellum (Port Hughes Fishing
Charters),
Mark Fletcher (Commercial fisher)*

— Brand

*Brooke Liebelt (Yorke Peninsula Tourism),
Liz Saint (Wallaroo Shores),
Mike Ellis (Yorke Peninsula Country
Times),
Nicola Adams (Red Wing Farmstay)*

— Events

*Rohan Bock,
Lynn Spurling (Kernewek Lowender &
Council Tourism Events Coordinator),
Glenys Blacker (Kernewek Lowender),
Elaine Bussenschutt (YP Field Days),
Gary Pammett (YP Field Days),
Bruce Philbey (YP Field Days),
Michael Byrne (Wallaroo Holiday Park)
Tom Chapman (The Dunes)*

— Health + Well Being

*Neil Sawley (Kadina Medical Associates),
Karen Bates (Director of Nursing)*

— Investment

*Bill Clarke (Councillor),
Ben Howard (Wallaroo Shores),
Barrie Harrop (Thrive Ventures P/L),
Michael Liebelt (Mosel Surveyors)*

— Aged Care/Lifestyle

*Ben Jolly (Gannon Group),
Judy Niotis (Star of the Sea),
Alison Clare (Moonta Health),
Rosie Francis (Estia)*

— Agriculture

*Mark Schilling (AG Schilling Enterprises),
John + Chad Kennett,
Gary ‘George’ Price,
Nick Bruce*

— Planning

Muller Mentz (Copper Coast Council)

— Education

*Paul Thomas (Mayor, Copper Coast
Council)*

— Copper Coast Community

*(Mike Newton,
Neville Hibbard,
Malcolm Sparks)*

25th October 2018

1-day Region Visit — Council and Community Update

— Council update

*Mayor Paul Thomas
CEO Peter Harder
Muller Mentz*

— Community update

*Lisa Robertson
Jo Freund
Brooke Liebelt
Stephen Stock
Mark Schilling*

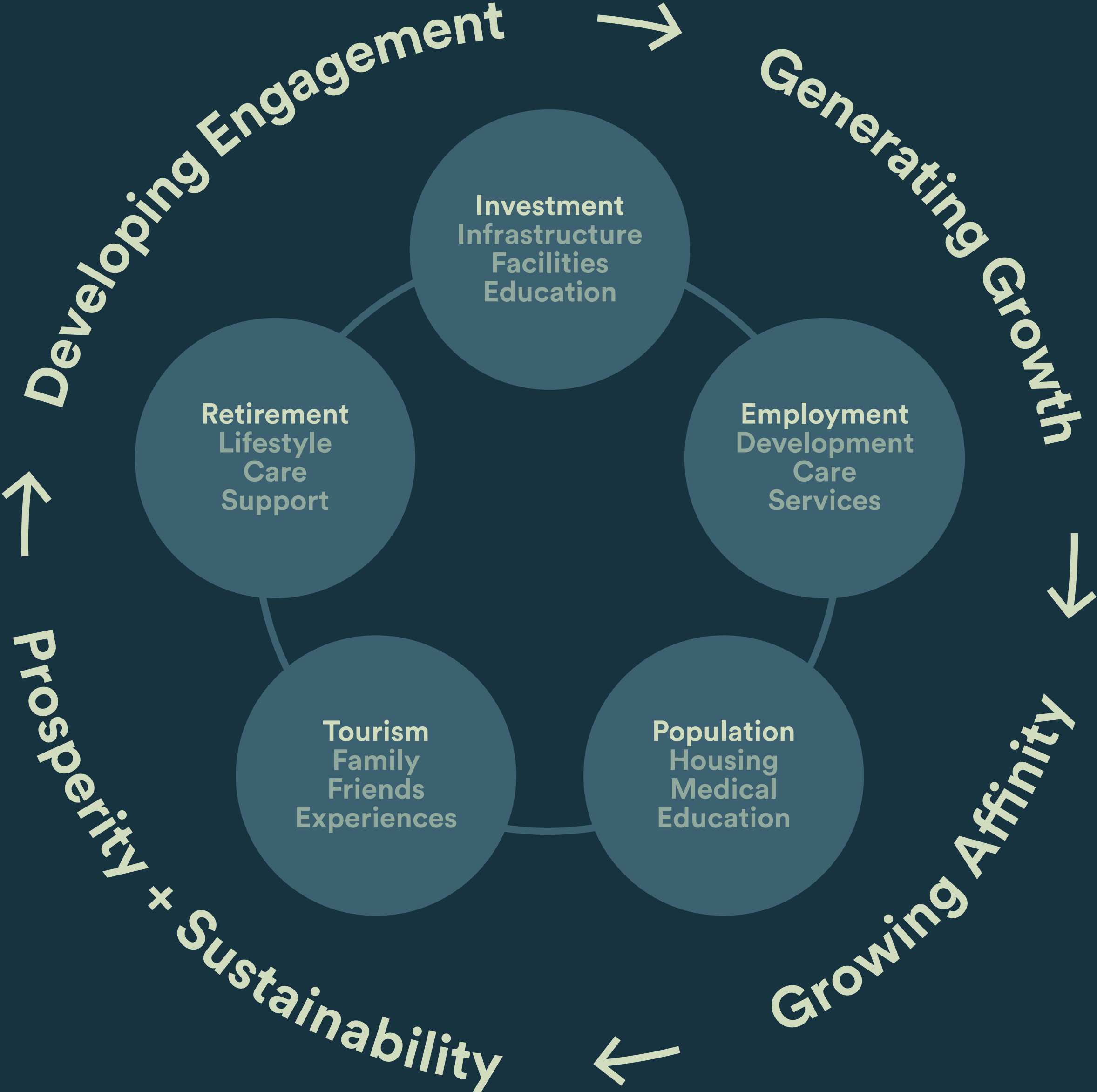
Findings

Economic development in the Copper Coast will be delivered by the community and commercial interests in the region working through four interconnected pillars of investment and activity. The pillars are tourism, health, education and investment.

Copper Coast Economic Development & Marketing Plan

Findings

These pillars underpin a continuous cycle of economic development initially establishing an affinity and engagement with the region leading to a more permanent relationship and the support that entails, both in infrastructure and economic value generation.



Copper Coast Economic Development & Marketing Plan

Findings

4 RDA Yorke & Mid North Region, Copper Coast Council Area Economic Review, *id* — *The Population Experts*.

Goals

1. To establish regional interest, commitment and momentum towards collaboratively delivered economic growth and social benefit.
2. To establish community leadership that complements Council contribution to implement the plan and deliver regional economic growth and social benefit.
3. To identify and prioritise key deliverables that together will commence the delivery of regional economic growth and social benefit.

Economic development and the activities undertaken to achieve it must be measured and motivated by challenging yet achievable targets. A list of six criteria are suggested below with which to track regional and plan implementation performance over the next 10 to 15 years. They are extrapolated from current trends and stretched based upon incremental activity proposed in the plan.

Growth Targets ⁴	Now	2031	Growth
Population	14,295	20,000	2.34% pa
Gross Regional Product	\$550m	\$800m	2.78% pa
Employment	4,500	6,000	2.08% pa
Businesses	1,000	1,250	1.61% pa
Visitation	500,000	750,000	4% pa
Tourism Spend	\$200m	\$311m	4% pa + \$5 p/visit increase

Copper Coast Economic Development & Marketing Plan

Findings

The plan began with identifying the key areas of regional strength and the key issues which were limiting their contribution or development, along with defining in macro terms, the segments of the population that do and will have impact on the plan and its implementation.

These streams were then explored and key regional values and attributes added to surround and guide the thought process. Finally, the key outcomes being targeted emerged, encapsulating the plan.

> See diagram overleaf

The quality of life the region offers and its location will underpin economic development with a strong agricultural base, established intrastate tourism market and emerging retirement economy.

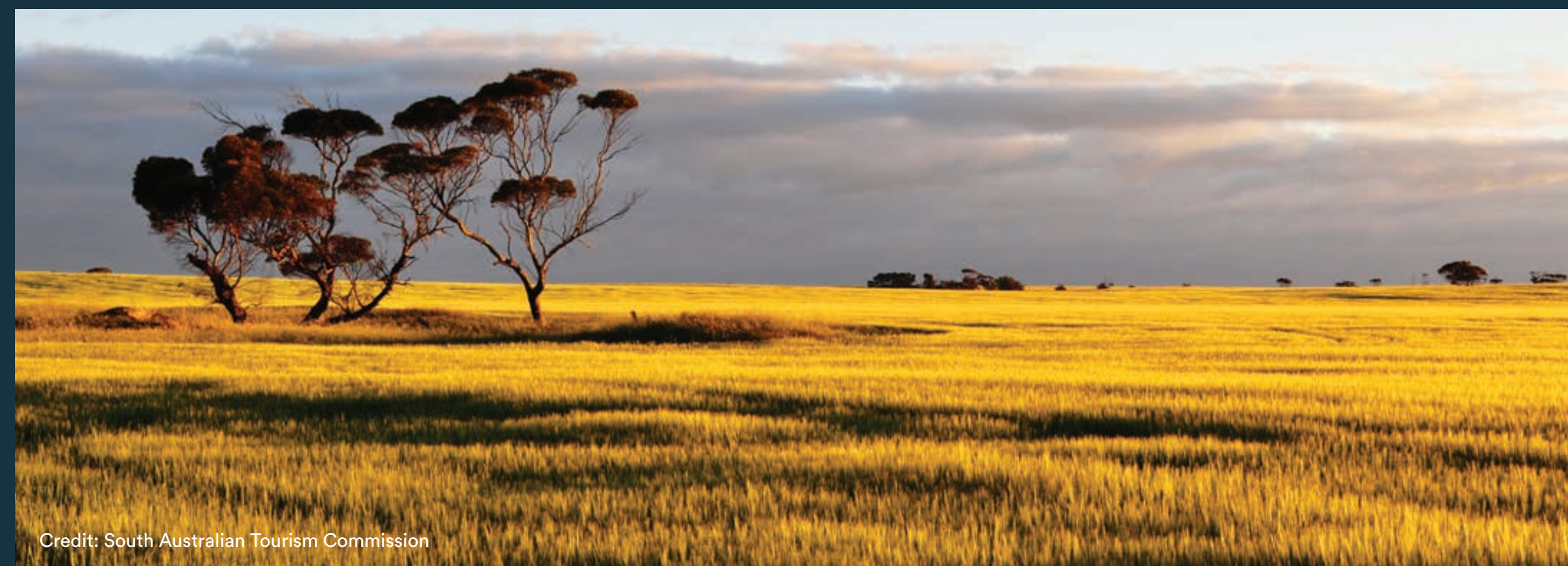
The location is family friendly and possesses a rich cultural heritage. It is also readily accessible from its major market Adelaide; early concerns about the quality of the roads dissipated following the announcement of major infrastructure investment in the Port Wakefield Road in August 2018⁵.

The region's brand emerged from the merger of the three municipal councils, Kadina, Wallaroo and Moonta in 1997 and the subsequent collective name adopted by the new entity. It has since been supported by a positioning line 'Lifestyle Location of Choice' which was an abridged version of the vision adopted by the Council in its strategic plan⁶, 'South Australia's lifestyle location of choice to live and visit.' Whilst both the brand and positioning statement accurately, and in the case of the latter in particular somewhat clumsily, reflect the location and reason for being of the region,

they do not leverage general consumer understanding nor align with broader promotional and communication activity. Anecdotal evidence and current South Australian Tourism Commission strategy⁷ demonstrate an emphasis placed on the Yorke Peninsula rather than townships, sub-regions or Council boundaries.

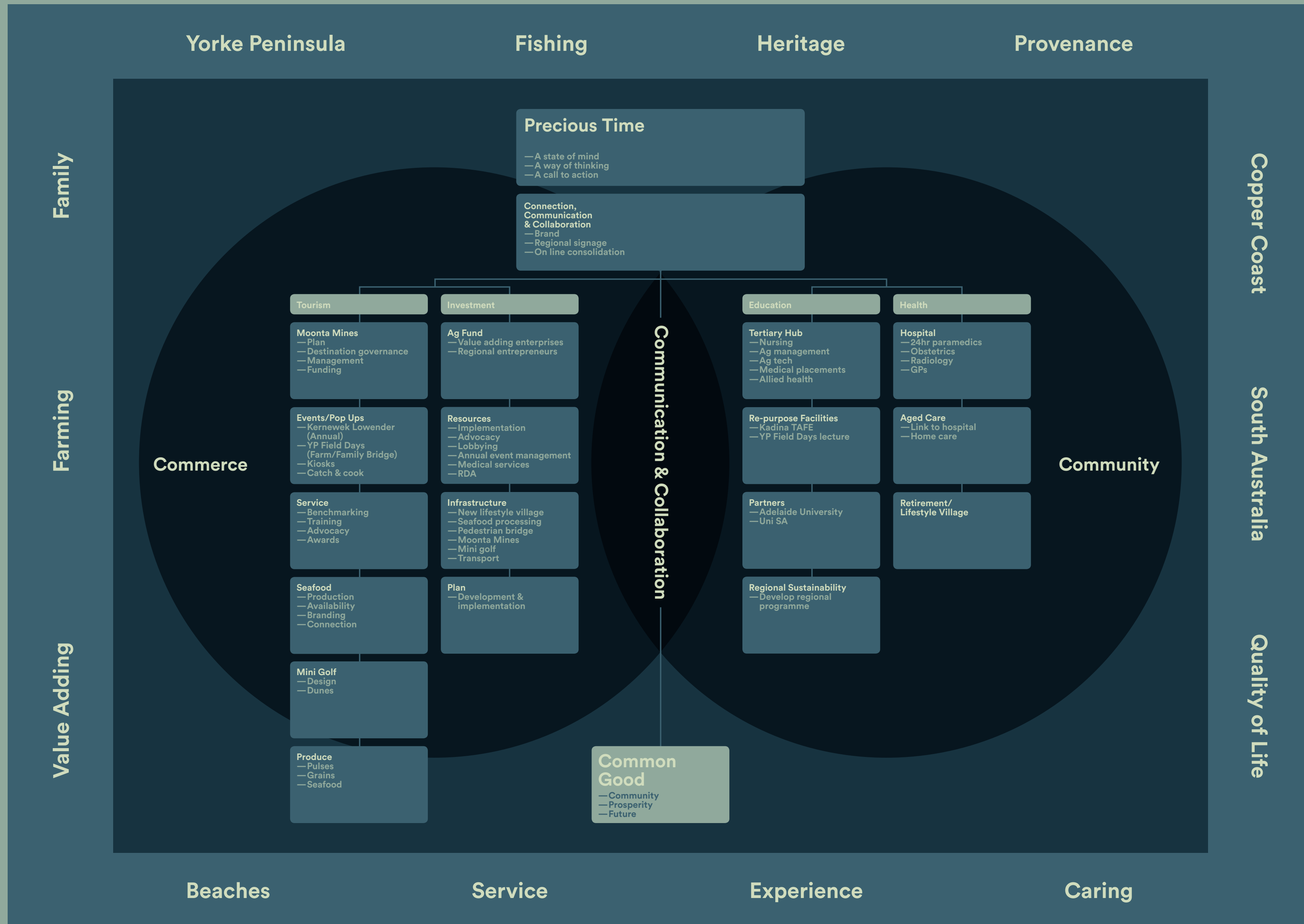
Tourism represents over a third of the gross regional product of the region, driven largely by intrastate visitors from Adelaide and its northern environs (Adelaide 60%-70%, Regional SA 19%-21%, Local 10%-20%)⁸ on holidays visiting family and friends (Intrastate 88%-91%, VFR/Holiday 93%-95%)⁹. Major holiday activity is focused on the beach and sea, with fishing a primary driver.

5 www.minister.infrastructure.gov.au/mccormack/releases/2018/august/mm137_2018.aspx
6 Pg 7, District Council of the Copper Coast, Strategic Plan 2015-2025.
7 <https://southaustralia.com/places-to-go/yorke-peninsula>
8 Yorke Peninsula insights supplied by SATC.
9 Pg 10, Yorke Peninsula Tourism Business Plan 2016-2017 & SATC Yorke Peninsula Regional Profile March 2018.



Credit: South Australian Tourism Commission

Economic Development



Copper Coast Economic Development & Marketing Plan

Findings

A strong sporting and recreation community and culture exists within the Copper Coast which has resulted in high quality local facilities that attract and host myriad events, competitors, and their supporters. This community and its venues must be maintained as they contribute significantly to the region's appeal, culture and well-being.

The cultural heritage associated with the Cornish mining history of the region is also a valuable and defining asset, reinforced bi-annually by the Kernewek Lowender festival. Engagement with this heritage is focused on the Moonta Mines site managed by the National Trust, which provides insights into the life, work and times of the miners and their families, when Moonta was the second largest town in South Australia.

There is an emerging local 'eating and drinking' offering particularly in and around Moonta, however this is largely under

developed and not maximising the provenance and quality of its local produce, not through lack of intent but rather through issues with the accessibility and suitability of product. Significant opportunity to address these issues exists through value adding local grains and pulses and improving production, distribution, retail and wholesale access to the region's seafood, for which the establishment of regional proprietary branding should be pursued. In addition, gaps exist in the quality of service and ability or willingness to cross promote the region's many experiences and offerings.

The health and well-being sector of the regional economy¹⁰ contributes significantly to its current amenity and potential. The Wallaroo Hospital is a regional hub offering general care and select specialist services, supported by broader community infrastructure that supports health and

well-being. Key areas of service include general health, obstetrics, geriatric care and increasingly mental health and drug use, all of which are responding to identified trends including; ageing population, evolving seasonal influx, growing retiree population and increasing younger and lower socio-economic demographic migration.¹¹ The sector identifies palliative care, transport, dementia, radiology, stroke management, obesity, emergency and indigenous cultural needs as areas that will require increasing service needs as the region develops.¹² In addition, the need to strengthen links and collaboration between the hospital service and aged care providers through various activities including increased home care provision, is recognised by all sector participants, as is an apparent shortfall in the regional stock of aged care and lifestyle facilities in the region now and going forward.

¹⁰ 17% employment, pg 6, Copper Coast SA Retail Market Profile. 4% economy, Business SA Regional Voice Report 2018 (28.8.18).
¹¹ Wallaroo Health Service Planning, a co-design approach, clinician engagement workshop.
¹² Wallaroo Health Service Planning, a co-design approach, clinician engagement workshop.



Credit: South Australian Tourism Commission



Findings

The health and well-being sector acknowledge the importance of working closely with the Council and local community to achieve the regional needs. “Councils role is to advocate for services within the catchment area, as well as provide intelligence with regard to future population trends. Council are also responsible for broader community infrastructure that supports health and well-being local facilities for example, as opposed to health service facilities.” — *Melissa Koch, Community Health Manager, Yorke and Northern Region Country Health SA Local Health Network Inc. SA Health, Government of South Australia.*¹³

State wide, the management of health services is being reformed under the current South Australia government including the establishment of 10 Local Health Networks (LHNs), each with its own Governing Board.¹⁴ The region’s health and well-being sector forms an integral and active part of the Yorke and Northern Health Network, requiring the development and maintenance of strong and effective relationships within this network to ensure further that the

needs and wants of the region and its community are able to be met now and into the future.

The importance of education in maintaining and developing a community is recognised within the region, which is well serviced by a collection of primary and secondary schools in Kadina, Wallaroo and Moonta. The Kadina Memorial School is the largest government school outside the Adelaide metropolitan area.¹⁵ In addition, the importance of education in delivering growth, innovation, entrepreneurship and employment is appreciated, as is the fact that students who leave the region to undertake tertiary studies are less likely to develop the strength or quality of bond or affinity to the area as if they had spent a larger proportion of these formative years within it. Recent announcements regarding the establishment of the Uni Hub Spencer Gulf in Port Pirie¹⁶ attest to an understanding of these issues across the broader South Australian regional community. The region enjoys strong historical links to state tertiary education. In 1872 local pastoralist, and miner Walter Watson Hughes provided an endowment of £20,000 to establish the University of Adelaide.¹⁷ Today, however, there is currently very limited opportunity for students to progress to tertiary

education within the region despite the rapid development of modern teaching technologies and practices.

The importance of private and public investment for the region in achieving the targets set out in this plan and delivering the region’s ambitions obviously cannot be overstated. It is fundamental that the region attracts and generates investment both from within and from outside its boundaries. It must demonstrate the value and potential returns it represents both socially and economically, through its planning, prioritisation and implementation of resource allocation, infrastructure investment, funding facilitation and commercial activity.

¹³ Email to Marc Allgrove, Evans + Ayers, 24th September 2018.

¹⁴ <https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/about+us/governance+reforms/govern-ing+boards>

¹⁵ Mayor Paul Thomas, Interview 6.9.18.

¹⁶ <https://unihubsg.org>

¹⁷ https://en.wikipedia.org/wiki/Walter_Hughes

Recommendations

1. Establish the ‘common good’ concept
2. Adopt a collaborative approach through community and commerce
3. Focus on four key areas — Tourism, Health, Education + Investment
4. Agree and deliver a specific set of actions
5. Establish and agree defined goals, targets and measurement

Economic Development Plan

The Economic Plan takes the project findings, distils their implications and uses them as a mechanic with which to filter and assess ideas leading to a simple list of actions. The successful implementation of the actions will require further investment in planning, delivery, lobbying and advocacy on particular projects, strategies and requirements.

The plan is based on delivering three goals through effective, efficient and collaborative implementation over a 10-15 year time frame and measured by the attainment of agreed targets.

Guiding Principles

Common Good

- Commerce and community
- Communication and collaboration

Focus

- Deeper rather than broader

Accountability

- What gets measured gets done

Goals

1. To establish regional interest, commitment and momentum towards collaboratively delivered economic growth and social benefit.
2. To establish community leadership that will compliment Council contribution to implement the plan and deliver regional economic growth and social benefit.
3. To identify and prioritise key deliverables that together will commence the delivery of regional economic growth and social benefit.

Copper Coast Economic Development & Marketing Plan

Economic Development Plan

¹⁸ RDA Yorke & Mid North Region, Copper Coast Council Area Economic Review, *id* — *The Population Experts*.

Targets

Growth Targets ¹⁸	Now	2031	Growth
Population	14,295	20,000	2.34% pa
Gross Regional Product	\$550m	\$800m	2.78% pa
Employment	4,500	6,000	2.08% pa
Businesses	1,000	1,250	1.61% pa
Visitation	500,000	750,000	4% pa
Tourism spend	\$200m	\$311m	4% pa + \$5 p/visit increase

Measurement

Following the adoption of the plan and implementation commencement, a regular reporting programme must be established to communicate progress and connect all stakeholders—community and commerce—instilling ownership amongst them all with, and of, the successful economic development of the region.

Actions

1

Actions

Brand Affirmation

Actions

1. Brand
Affirmation

The regional brand will form the platform upon which and by which the region's development is communicated and delivered. It must be unifying and understandable, providing direction, location and identity. It must be aware of the environment in which it operates, leveraging complimentary assets and reflecting and reinforcing the region's key attributes and values to both its audience and constituents. The brand essence, based on its properties, attributes and values is represented in the following summary.

Copper Coast Economic Development & Marketing Plan

Actions 1. Brand Affirmation

Strategic Intent

To establish regional interest, commitment and momentum towards collaboratively delivered economic growth and social benefit.

To establish community leadership that will compliment Council contribution to implement the plan and deliver regional economic growth and social benefit.

To identify and prioritise key deliverables that together will commence the delivery of regional economic growth and social benefit.

Key Reasons to Believe

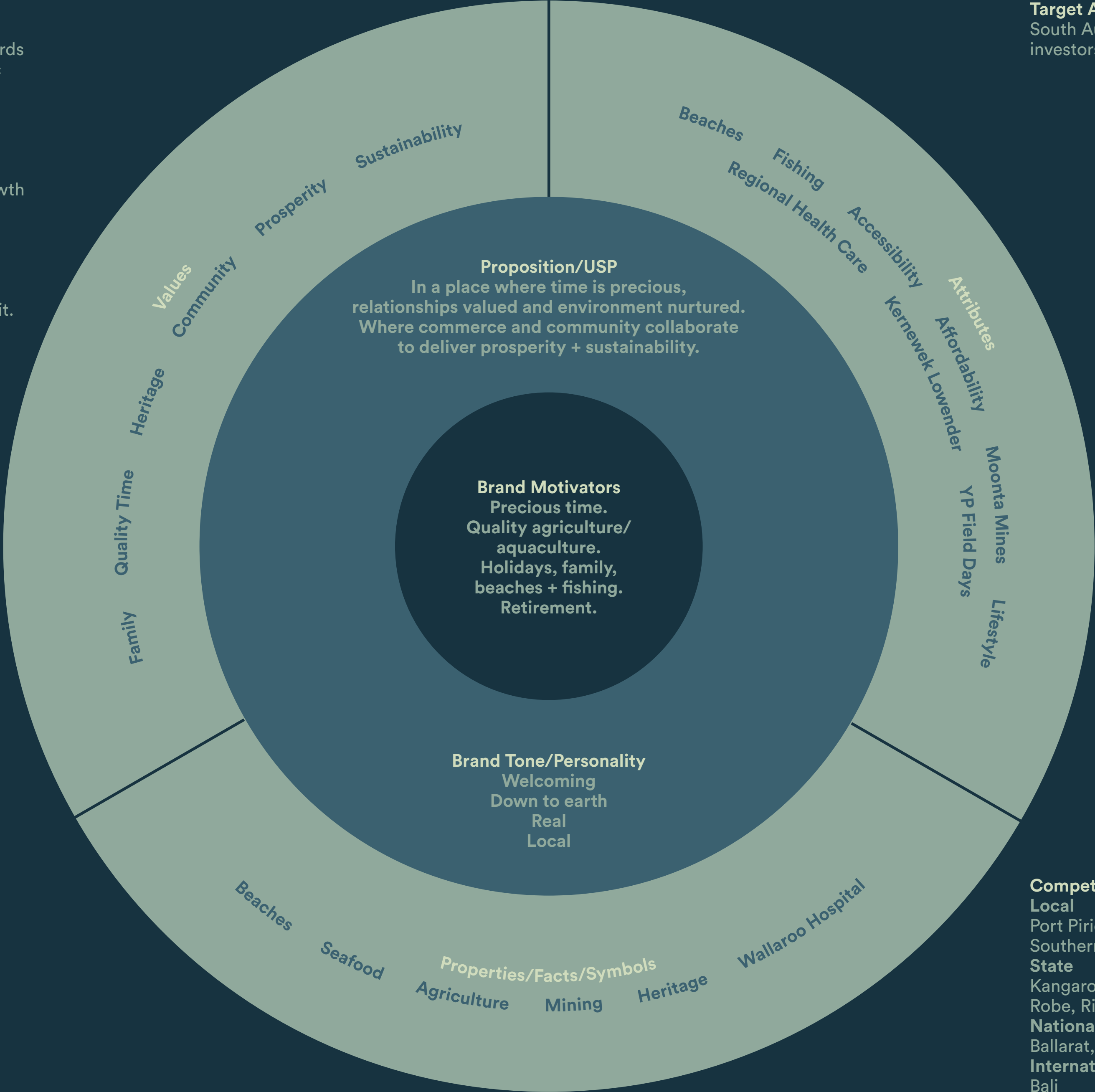
- Who?** South Australian families.
- What?** Family, fishing, beaches, produce.
- Why?** Caring, nurturing, growing.

Target Audience

South Australian family holidays, retirees, investors and policy makers.

Competitors

- Local** Port Pirie, Clare Valley, Southern Yorke Peninsula
- State** Kangaroo Island, Fleurieu Peninsula, Robe, Riverland, Beachport
- National** Ballarat, Swan Hill
- International** Bali



Copper Coast Economic Development & Marketing Plan

Actions

1. Brand Affirmation

Name Yorke Peninsula's Copper Coast

The region's brand name, Copper Coast, emerged from the merger of the three municipal councils, Kadina, Wallaroo and Moonta in 1996 and the subsequent collective name adopted by the new entity. It has since been supported by a positioning line 'Lifestyle Location of Choice' which was an abridged version of the vision adopted by the Council in its strategic plan, 'South Australia's lifestyle location of choice to live and visit.'

Whilst both the brand name and positioning statement accurately, and in the case of the latter in particular somewhat clumsily, reflect the location and reason for being of the region, they do not leverage general consumer understanding of where you are located, nor align with broader promotional and communication activity from agencies such as SATC who only reference Yorke Peninsula. We therefore are suggesting a new brand name for the region — Yorke Peninsula's Copper Coast.

Aim

To establish regional confidence, regional advocacy and regional cohesiveness through the development of a consistent regional marketing and communications plan. To establish messaging which reinforces and links the qualities and values of the region, articulates the relationship/roles of the Yorke Peninsula/Copper Coast brands and encourages residents to 'love the place they live' and to advocate on its behalf.

Strategy + Management

To review the brand interplay, communication platforms (including online, advertising and signage) and priority regional offerings/experiences to develop applications that reinforce the strengths and values of the regional offering and encourage visitors to spend more time and money in the region by broadening their regional interaction. Along with motivating residents to assume an increasingly positive outlook on the region and to proactively advocate on its behalf.

Management should be led by a defined role within Council, supported by a small committee consisting of relevant regional representatives

Outcome

Consistent, positive and clear regional branding and messaging informing a marketing plan, actions and implementation strategies/responsibilities.

Development Costs + Returns

Costs associated with review and plan development along with implementation will deliver significant returns with consistent, affirming messaging and increasing regional awareness and positivity.

Funding

Council funded development and implementation (advised budget of \$300K from the original tender document) and an annual allowance for continued presence and evolution within and beyond the region.

Copper Coast Economic Development & Marketing Plan

Actions

1. Brand Affirmation

Marketing Plan Building Confidence

Objective

The objective of this Marketing Plan is to aid in the overarching objective of the Copper Coast Council to position the region as “South Australia’s lifestyle location of choice to live and visit”, and to drive economic development within the region.

Key recommendations of this report are:

- Delivery of regional economic growth will come from a collaborative interaction between the community and commercial interests, not from Council.
- The greatest return will be generated by encouraging current visitation to stay longer and spend more rather than pursuing higher visitation numbers.

As such, the Marketing Plan focuses on driving and achieving these recommendations, within a \$300,000 annual budget.

Who are we talking to?

- Residents
- Local business and industry
- Shack owners
- Holiday makers (Adelaide’s northern suburbs focus)
- Grey nomads



Billboard Photography Credit: South Australian Tourism Commission



Credit: South Australian Tourism Commission

Copper Coast Economic Development & Marketing Plan

Actions 1. Brand Affirmation

Marketing Plan SWOT Analysis

This is a useful technique for understanding and identifying a region's Strengths and Weaknesses, what Opportunities can be exploited and the Threats faced. Used in a regional context, it helps to carve a sustainable and ownable brand position in the market.

Strengths

- Proximity to Adelaide
- Family friendly
- Fishing, beaches, outdoor activities
- Proximity to nature and Innes National Park
- Clean air, land, sea
- Sustainable farming and agriculture
- History tourism
- Affordable

Weaknesses

- Distance from Adelaide deters day trippers
- Public transport in region
- Accommodation options
- Health and Aged Care
- Availability of fresh seafood
- Stalled projects (The Dunes, Wallaroo Shores, Wallaroo Marina)

Opportunities

- Wallaroo Marina and Wallaroo Shores activation
- Connect Wallaroo North Shore to town centre
- Aquaculture
- Access to fresh caught seafood (Western King Prawn)
- Farm/sea to plate
- Agritourism
- Provenance

Threats

- Competitor regions
- Lack of collaboration between council, community and commerce
- Inter-town rivalry

Copper Coast Economic Development & Marketing Plan

Actions

1. Brand Affirmation

Marketing Plan Positioning Statement

Positioning is arguably the most important sentence in any brand strategy. It is a concise description of what a brand does differently to its competition, and how they wish to be perceived. The region's strengths (clean air, land, sea; family friendly; outdoor leisure activities; sustainable agriculture; affordability) paired with the opportunities

at hand create a space Yorke Peninsula's Copper Coast can own. The positioning has to communicate equally to all target audiences (families, holiday makers, grey nomads, retirees, investors and policy makers) across all topics (lifestyle, tourism, agriculture, manufacturing, industry, health and aged care, etc).

**Yorke Peninsula's
Copper Coast
Naturally better.**

Copper Coast Economic Development & Marketing Plan

Actions 1. Brand Affirmation

Marketing Plan Brand Passport

A Brand Passport is a concise snapshot showing who we are, what we offer, what we stand for, how we behave and who we're talking to.

What we offer

**Precious time; clean air, land, sea;
sustainable agriculture/aquaculture;
family friendly holidays, beaches and fishing;
quality retirement.**

What we stand for

**Family, Quality Time,
Heritage, Community,
Prosperity, Sustainability**

Who we are

**Yorke Peninsula's Copper Coast
Naturally Better.**

How we behave

**Welcoming
Down to earth
Real
Local**

Who cares

**Residents, local business and industry
shack owners, holiday makers
grey nomads, retirees, investors,
policy makers**

Copper Coast Economic Development & Marketing Plan

Actions

1. Brand Affirmation

1. Brand Identity program

Budget: \$50,000
Completed Year 1

Brand is reputation. It is what people say about you when you're not in the room. Brand positioning and identity allows you to control that conversation.

A key pillar of the Marketing Plan will be to address the region's Brand Identity. Leading this is a name change to "Yorke Peninsula's Copper Coast" and a revised Positioning. This change leads with a region familiar to all South Australians, leverages SATC promotional activities, locates the Copper Coast and recognises the positive connotations of the name "Copper Coast" in a marketing and tourism context.

The brand identity program is to include:

- How Brand Strategy (promise, positioning, personality, attributes) comes to life
- Logo
- Colour palette
- Typographic standards
- Tone of voice
- Graphic language
- Collateral
- Advertising
- Signage and livery
- Photographic style
- Brand extensions, community and regional marks (ie "Grown in YPCC", "Made in YPCC", Proudly YPCC", etc)
- Comprehensive Brand Identity Style Guide

2. Website

Budget: \$50,000
Completed Year 1

Develop a new tourism website for Yorke Peninsula's Copper Coast to marry the tourism and municipal aims, providing a single source of information about the region, its attractions, history and lifestyle.

3. Digital Campaigns

Budget: \$50,000
Completed Year 1

- External Facebook and Google advertising campaigns highlighting regional attractions and targeting shack owners, holiday makers (Adelaide's northern suburbs focus) and grey nomads
- Internal Facebook and Google advertising campaigns highlighting Economic Development Plan findings and recommendations, what makes the region special and local success stories, targeting residents and local business owners.

4. Signage

Budget: \$100,000+
To be completed over a 2-3 year time frame

- Lobby DPTI to change highway signage to reference Kadina, not Bute.
- Entry signage to each town highlighting and selling the attractions of each town.
- Exit signage from each town highlighting and selling the attractions of nearby towns, with travel times.
- Outdoor campaign from Port Wakefield, selling the attractions of Yorke Peninsula's Copper Coast.

5. Print campaign

Budget: \$100,000+
Completed Year 1

- Develop a quarterly newspaper extolling the region, local heroes, success stories, upcoming events, etc. Newspaper to be delivered to all residents, and distributed through cafés, hotels, restaurants, boutiques and convenience stores. The publication to be developed by Council with the YP Times developing content. It is important that this initiative is fully funded and not rely on advertising.

2

Actions

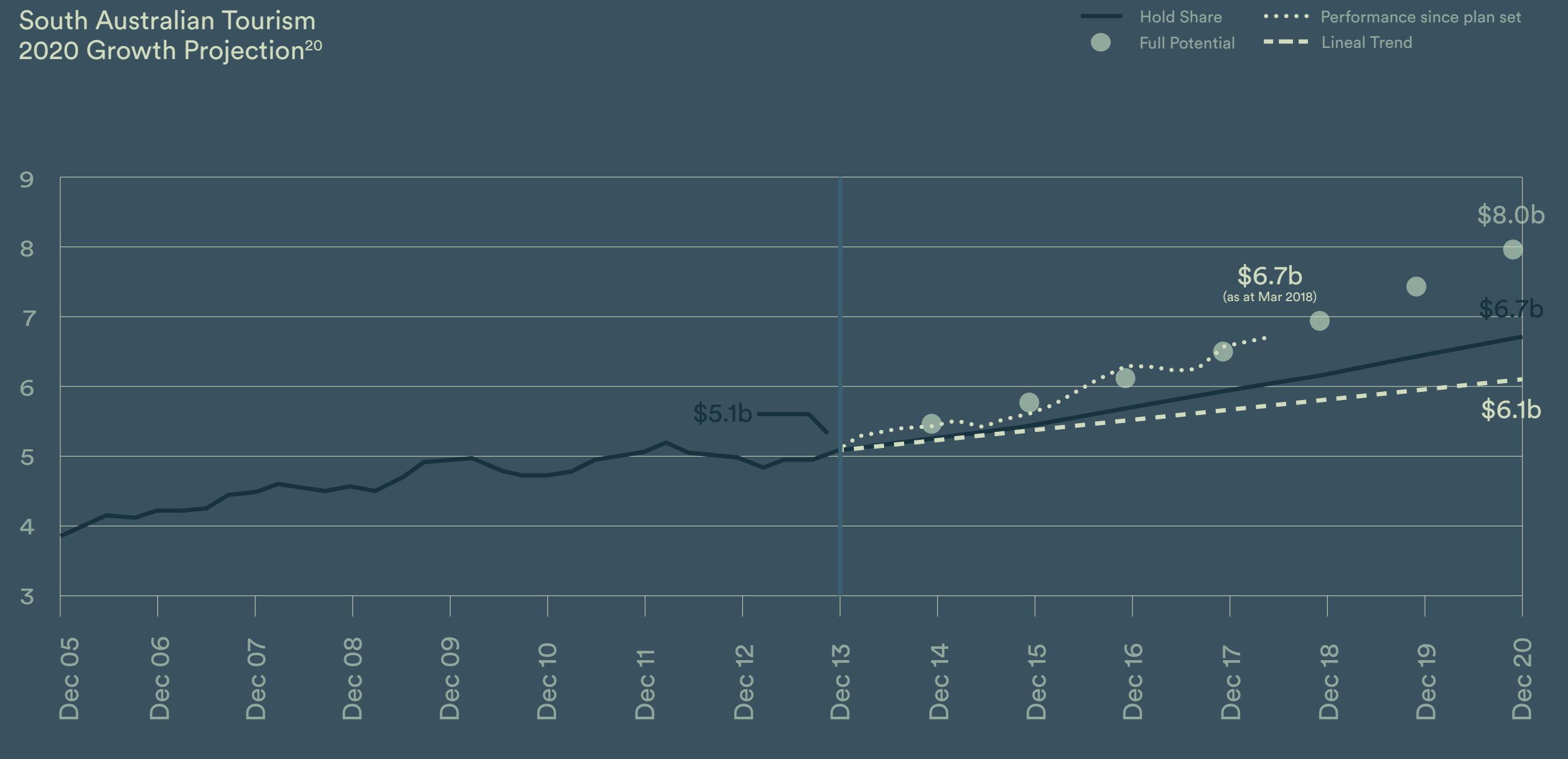
Develop Tourism Offering

Tourism is a major contributor to the state's economy and its growth. The current 2020 state plan includes a target of growing the state's tourism economy to \$8B. Recent review in preparation for the development of the 2030 plan proposes increasing that target to \$12.8B based on current trajectories.¹⁹

Copper Coast Economic Development & Marketing Plan

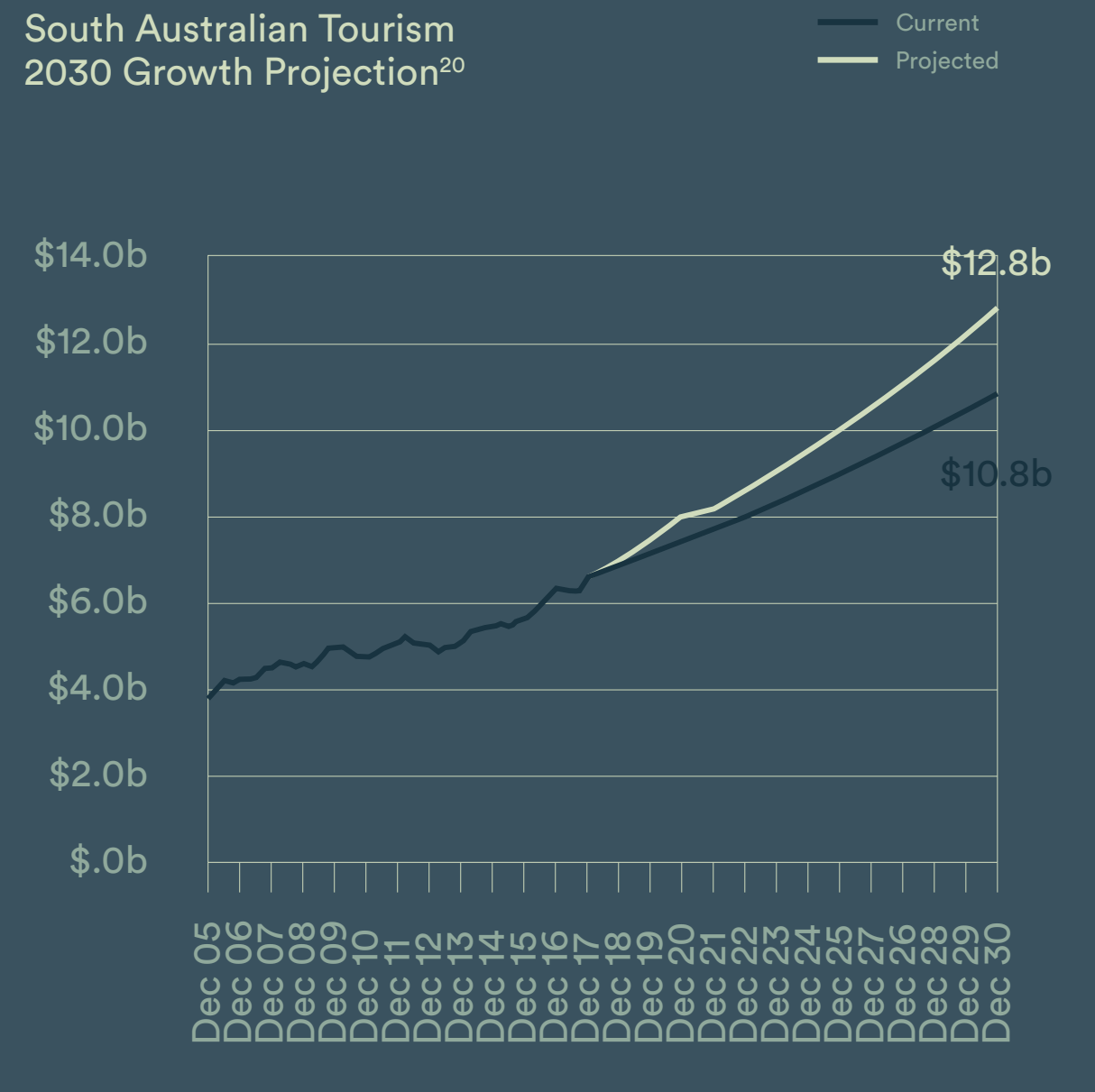
Actions 2. Develop Tourism Offering

South Australian Tourism 2020 Growth Projection²⁰



²⁰ <http://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>

South Australian Tourism 2030 Growth Projection²⁰



Copper Coast Economic Development & Marketing Plan

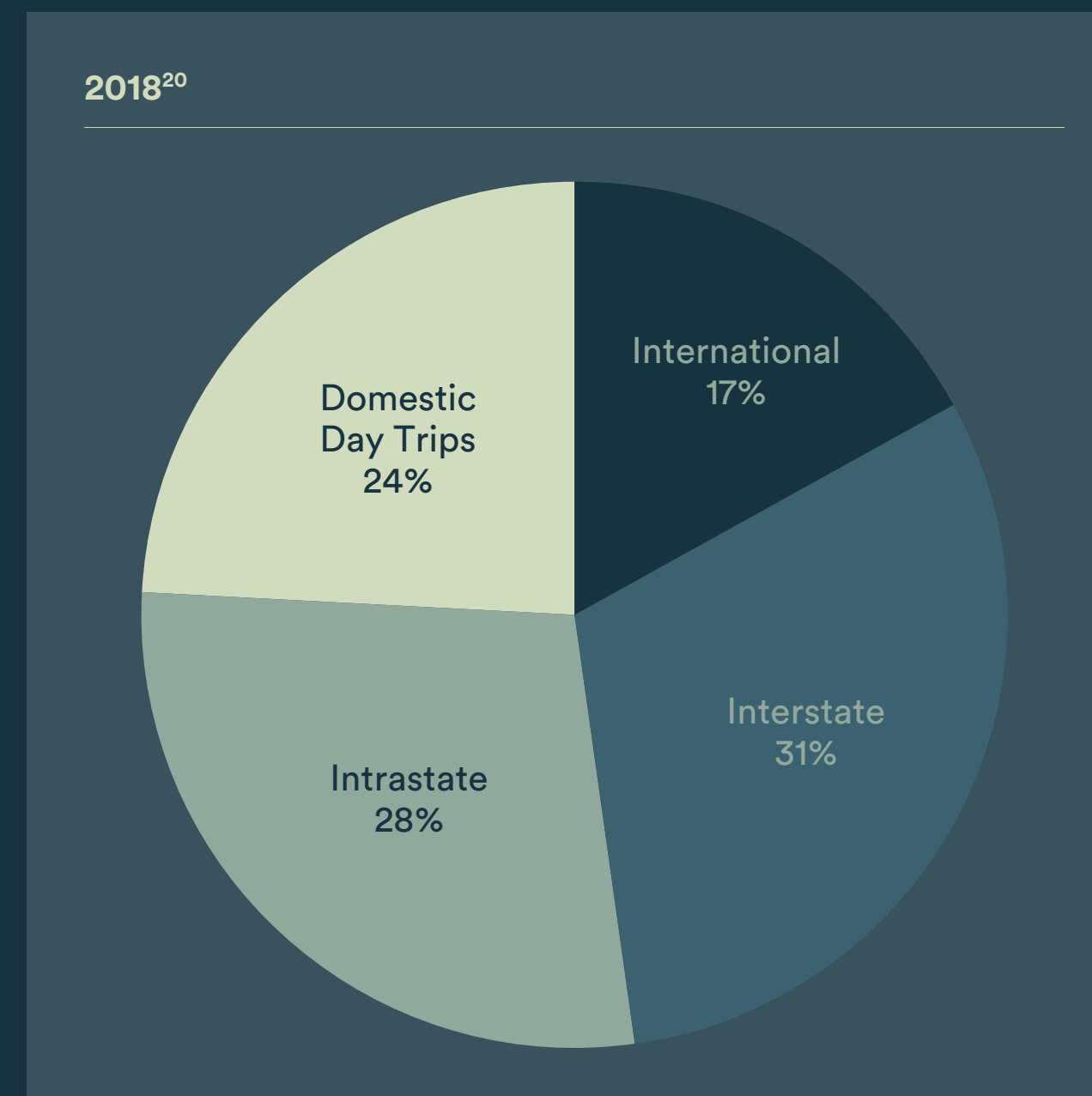
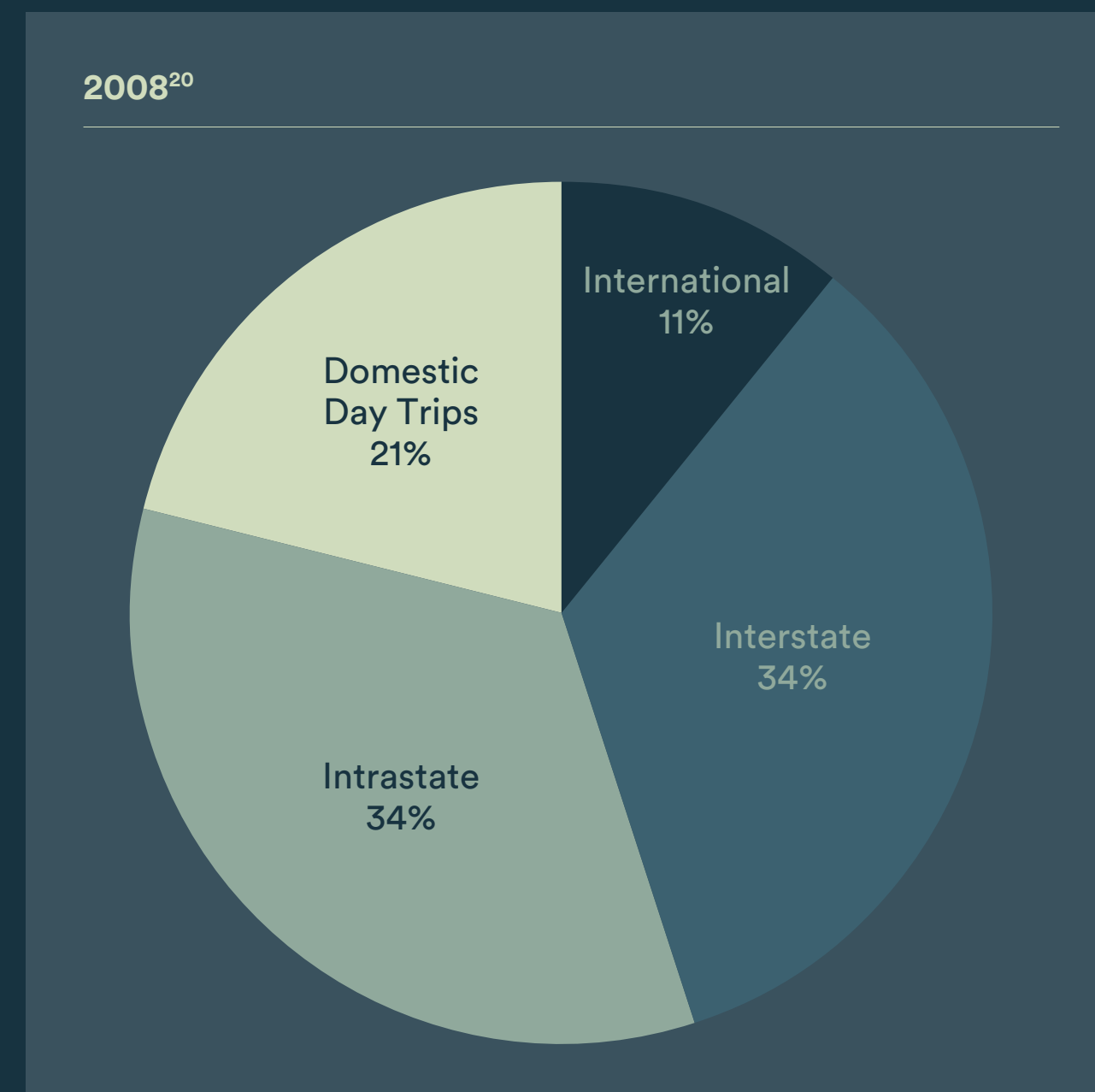
Actions 2. Develop Tourism Offering

The five key pillars that have underpinned the state's tourism strategy are forecast to remain unchanged going into the 2030 plan. The five pillars; drive demand, work better together, support what we have, increase recognition of the value of tourism and use events to drive visitation; are all very relevant to the Copper Coast tourism market and opportunity.

From a state perspective, significant focus has been placed on increasing international (doubled in the last 10 years) and interstate visitation (+29%), however the key trends to be leveraged by the Copper Coast are the 71% increase in day trips over the period and 18% growth in intrastate travel.

As a consequence of the aforementioned trends the profile of the visitor to South Australia has changed as per images below, however in the Copper Coast intrastate travel accounts for over 90% of all visitation and as such should remain the focus of effort and investment.

²⁰ <http://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>



Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

The March 2018 South Australian Tourism Commission Market Update reports almost half a million visitors per annum to the Copper Coast, contributing over \$200 million to the economy. The table to the right demonstrates the potential scale of tourism in the region if current growth rates are maintained, along with the impact of focusing on providing a greater number of experiences to visitors with an aim to increase the value of each visit. At current growth and expenditure rates the value of regional tourism will grow to well in excess of \$300 million per annum by 2026, plus if an extra \$5 contribution can be extracted from each visit a further \$25 million could be generated over the period. Reinforcing the value in focusing on intrastate travel and increasing the opportunities for visitors to spend money whilst in the region.

Tourism Visitation SATC March 18 Update

Visitation per annum	485,000
Annual contribution	\$200,000,000
Contribution per visit	\$412.37
Extra value per visit	\$5.00
Growth rate	4%
Domestic overnight trips growth rate	5%
Domestic day trips growth rate	3%
Domestic nights growth rate	9% (6% State)

Projected Revenue After Extra Value Per Visit Is Implemented

Year	Visitors per annum, projected growth of 4% p.a	Annual contribution	Annual contribution incl. extra value of \$5 per visit	Extra value
2019	504,400	\$208,000,000	\$210,522,000	\$2,522,000
2020	524,576	\$216,320,000	\$218,942,880	\$2,622,880
2021	545,559	\$224,972,800	\$227,700,595	\$2,727,795
2022	567,381	\$233,971,712	\$236,808,619	\$2,836,907
2023	590,077	\$243,330,580	\$246,280,964	\$2,950,383
2024	613,680	\$253,063,804	\$256,132,202	\$3,068,399
2025	638,227	\$263,186,356	\$266,377,490	\$3,191,135
2026	663,756	\$273,713,810	\$277,032,590	\$3,318,780
Total				\$23,238,279

Copper Coast Economic Development & Marketing Plan

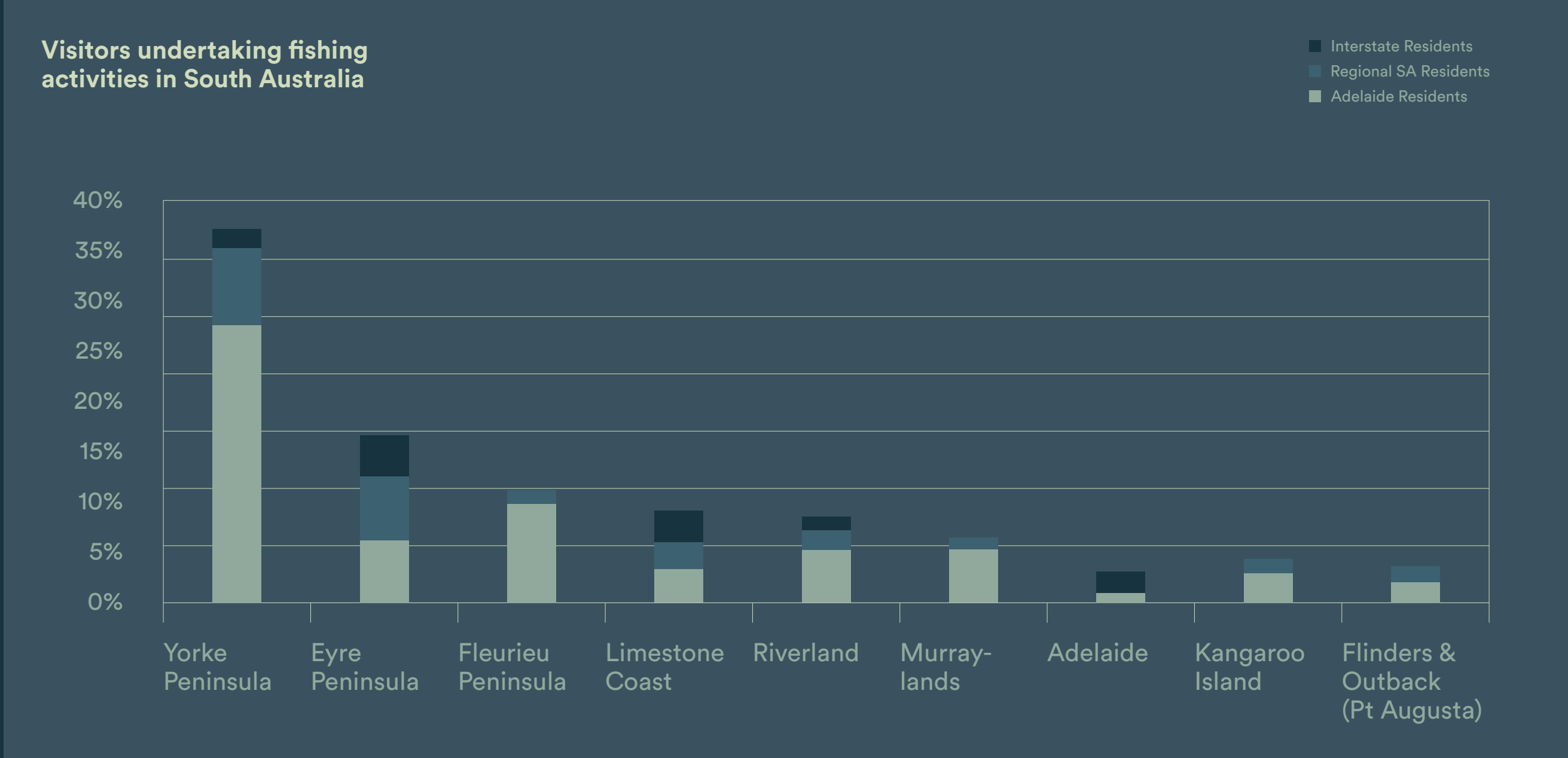
Actions 2. Develop Tourism Offering

The vast majority of visitation to the region is classified as leisure visitation²¹ (VFR — visiting friends and relatives and/or holidaying), combined these reasons for travel represent 93% of travel purpose.

The top four activities undertaken by visitors to the region are going to the beach (53%), eating out (51%), family gatherings (42%) and fishing (35%). The graph below, supplied by the South Australian Tourism Commission, clearly highlights the position of the Yorke Peninsula as South Australia’s premier fishing destination; a unique and reinforceable attribute.

The coastal lifestyle quality of the Yorke Peninsula and its Copper Coast is reinforced as a differentiator in the table overleaf, which summarises and compares the visitor strategies of neighbouring and comparable regions.

21 SATC Yorke Peninsula Regional Profile



Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

²² South Australian Regional Visitor Strategy 2020, published May 2018.

South Australian Regional Visitor Strategy Comparison²²

	Barossa	Flinders Ranges + Outback	Kangaroo Island	Yorke Peninsula	Total state
Spend	\$190m	\$425m	\$123m	\$198m	\$6,6b
% state regional total (Excl. ADL)	8%	17%	5%	8%	
Employment	800	2,600	700	1,600	36,000
% state regional total (Excl. ADL)	4%	14%	4%	9%	
No. of businesses	372	516	143	461	
% state regional total (Excl. ADL)	7%	10%	3%	9%	
ATDW	283	151	143	314	
% state regional total (Excl. ADL)	76%	29%	100%	68%	
Identity focus	Wine + regional events	Wildlife, landscape, indigienous	Nature, artisan producers	Coastal, lifestyle, nature	
Events	— Vintage Festival — Gourmet Weekend		— Kangaroo Island Races — Marathon	— Kernewek Lowender — YP Field Days	
Accommodation target	5 star property	Caravan + camping	Upgrade	4-5 star accommodation	
Capability	International marketing	Digital marketing	Digital marketing, skilled staff	Customer service	
Infrastructure	Wayfinding/signage	Accessibility/transport	Coastal	Roads + coastal	
Touring route	Epicurean Way	Explorers Way	Southern Ocean Drive	Coastal Way	

The tourism development recommendations following this page are informed by current trends, supported by the region's attributes, guided by the plan's principles and underpinned by the key pillars of the state's current and evolving tourism strategy.

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

- Moonta Mines
 - Plan
 - Destination Governance
 - Management
 - Funding

Aim

To develop and leverage the Moonta Mines site and heritage through destination/ experience creation to drive increased regional awareness, demand, visitation and expenditure.

Strategy + Management

Project and asset ownership and management between the Heritage Trust, Council and volunteers needs to be defined to ensure good governance and delivery. In addition, funding models and sources need to be agreed, targeted and secured, along with a delivery timeline and reporting structure established.

Outcome

Hub created to welcome and retain visitors, providing a focused experience, encouraging dwell time/expenditure and raising the quality of the Moonta Mines offering.

Hub

To include improved courtyard (landscaping, signage, parking), small retail space/café, upgraded sweet shop and upgraded train service (signage, audio, lighting).



Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

²³ Pricing review, collective access pricing, see <http://www.visitglenforest.com/index.php>

²⁴ Moonta Mines Heritage Area, Site development Plan + Business Case (Locales/TRC), June 2018.

²⁵ Email, Copper Coast Council CEO Peter Harder, 4/10/18 + Jo-anne Buchanan, RDA Yorke + Mid North.

Development Costs + Returns

Based on the ‘Locales’ site development and business case report, an indicative budget of \$2M for the project is forecast. Potential annual revenues based on pricing reviews²³ and increased visitation should exceed \$500K per annum across all elements of the new experience/hub. A detailed business plan and model should form an integral part of the strategy, management and delivery of this project, including staffing requirements going forward.

Funding

Review Council loan proposition along with national heritage and state tourism development grants.

Council Loan Proposition is based on the ability of the National Trust to secure a \$500k loan, following which the Copper Coast Council would approach the South Australian government for matching funds or apply for a state regional development grant. Once this funding is secured, a pitch for support from the Building Better Regions Fund would be collaboratively developed based on the TRC/Locales Moonta Mines report.²⁴ Further funding may be accessible through State Heritage to allow a Site Conservation Plan to be produced.²⁵

Development Costs²⁴

Courtyard —Arrival/parking	\$150,000
Theatrette —40 people. Fitout, equipment & design	\$600,000
Information centre, Retail space + cafe —Fitout existing building, small cafe facility (20 pax)	\$720,000
Toilets	\$50,000
Sweet shop upgrade	\$40,000
Train upgrade —Signage, audio & lighting	\$300,000
Total	\$1,830,000
Current revenue	\$447,520
Potential revenue (Repriced)	\$603,120

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

26 YP Field Days visitation promoted to be between 30,000-40,000, in 2017 the numbers were said to be 20,000, meeting 4/9/18 YP Field Days committee, Dunes Pt Hughes.

- Events + Pop Ups
- Kernewek Lowender
- YP Field Days
- Pop Ups
- Catch + Cook

Aim

The Copper Coast region offers many events of varying scale and content along with annual New Year's celebrations which attract significant numbers of visitors and generate a high level of expenditure. The region should focus on developing and delivering the two major festivals, Kernewek Lowender and the Yorke Peninsula Field days, along with establishing F+B pop ups to showcase the region, drive visitation and generate SATC support. Innovative F+B events during peak periods will enhance the region's food and beverage culture and offering, encourage entrepreneurship and provide business development opportunities. Existing businesses should be encouraged to develop events which showcase regional produce, in particular seafood and the ability to catch it, as well as grains and the many ways to transform them including brewing, baking and cooking.

Strategy + Management

Plan, Prioritise + Resource

Review KL strategy with committee to ensure appeal to a younger audience, increase in profile, become annual event (reduce seasonality) and receive potential SATC funding. Ensure YP Field Days are scheduled in school holidays, include regional showcases and becomes a SA Major Event. Develop pop up proposals for local business consideration (ie Moonta Bay kiosk + Gelati). Undertake a feasibility study into the 'Catch + Cook' concept.

Outcome

Successful delivery of two major events to ensure inclusion on major event calendar, innovative delivery of 1-3 pop ups across region and the development of a third annual regional event showcasing and reinforcing the local family/fishing positioning.



Credit: South Australian Tourism Commission



Credit: Kernewek Lowender

School Holidays

The 2015 YP Field Days were held on the 29/9 to 1/10, in the first week of term 3 school holidays in South Australia. In 2017 the event was held from the 26th-29th of September, the last three days of term 3 of the schooling year just prior to the holiday break. Feedback presented by YP Field Day committee members suggested that this had a significant impact on visitor numbers, down by almost a third to 20,000.²⁶ The 2019 Field Days are again scheduled to be on the last three days (24th-26th of September) of term 3, potentially impacting visitation again.

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

27 Supplied by Copper Coast Council CEO.

Development Costs + Returns

Maintain Council support through sponsorship and review increasing it by prioritising the two events. Focus Council event staff on these events PLUS the development of a third event and 2-3 pop up opportunities. Evaluate based on visitation, profile generation and operator occupancy. These tables highlight the impact of events in driving visitation by showcasing the regional caravan park revenue lift in years when the Kernewek Lowender festival is held. Furthermore they highlight the impact of prioritising and targeting greater expenditure over greater visitation. On the assumption of 40,000 attendees to the event all of whom spend \$10, a 5% increase in visitation to Kernwek Lowender will generate a \$20,000 increase in value, whilst an extra \$5 expended per visit generates and extra \$200,000 in value.

Funding

Council sponsorship (cash/resource), Events SA, participation + attendance fees.

Caravan Park Revenue Growth During Kernewek Lowender Events²⁷

Kernewek Lowender Activity	Year	Revenue	Growth rate
	2010	\$99,346	
KL	2011	\$126,919	28%
	2012	\$156,175	23%
KL	2013	\$194,198	24%
	2014	\$164,449	-15%
KL	2015	\$235,667	43%
	2016	\$195,913	-17%
KL	2017	\$260,603	33%

Kernewek Lowender + YP Field Days Growth

	Kernewek Lowender	YP Field Days
Attendance	40,000	20,000
Cost per visitor	\$10	\$10
Value	\$400,00	\$200,000
Attendance increase	5%	5%
Attendance	42,000	21,000
Value	\$420,000	\$221,000
Increase spend per visitor	\$5	\$5
Value addition	\$200,000	\$100,000

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

- Service**
- Benchmarking
 - Training
 - Advocacy
 - Awards

Aim
To raise the awareness of the importance of quality service in ensuring quality regional experience. To raise the level of service quality and operator/staff skills and to foster the development of a continuous improvement, regional collaboration, competition and support. This competency will positively impact the region as a whole and in particular will ensure that the Copper Coast, the businesses within it and the experiences they offer will be ready to maximise the impact and benefit of the impending arrival of the cruise ship industry to the region in late 2019.

Strategy + Management
To identify regional leaders and work with them to become advocates and ambassadors, along with the development of an awards or classification system to accredit or recognise quality service and development. Deliver regional planning,

seminars and implementation. Host leaders on study trips to Adelaide to witness best in class delivery and service.

Outcome
A genuine commitment to the development of service excellence and an implemented service accreditation/awards programme.

Development Costs + Returns
Council investment/training grant funding to develop the programme. Evaluate based on visitation, profile generation, programme delivery/participation and operator occupancy/profitability.

Funding
Council investment/training grant funding to develop the programme plus RDA Yorke + Mid North to continue to provide and manage it.



Credit: CMV Australia

Copper Coast Economic Development & Marketing Plan

Actions

2. Develop Tourism Offering

Seafood

- Production
- Availability
- Branding
- Connection

Aim

To reconnect the regional seafood industry with local community and food + beverage providers through supporting the ability to process and distribute locally caught seafood within the region and to develop the Western King Prawn brand to be a regional proprietary offering.

Strategy + Management

1. Clean Seas/PIRSA

Lobby the state authorities to raise the permitted farmed tonnage to make Clean Seas investment viable.

2. Fish Processing Facility

Develop a business case for minimum requirements and investment to establish a fish processing facility at Wallaroo along with identifying interested operators.

3. Focus seafood

Western King Prawn, King George Whiting, Blue Swimmer Crab and Squid.

4. Western King Prawn Brand

Review potential and benefit to own the Western King Prawn brand versus investing to own and leverage the Spencer Gulf Prawn brand.

Outcome

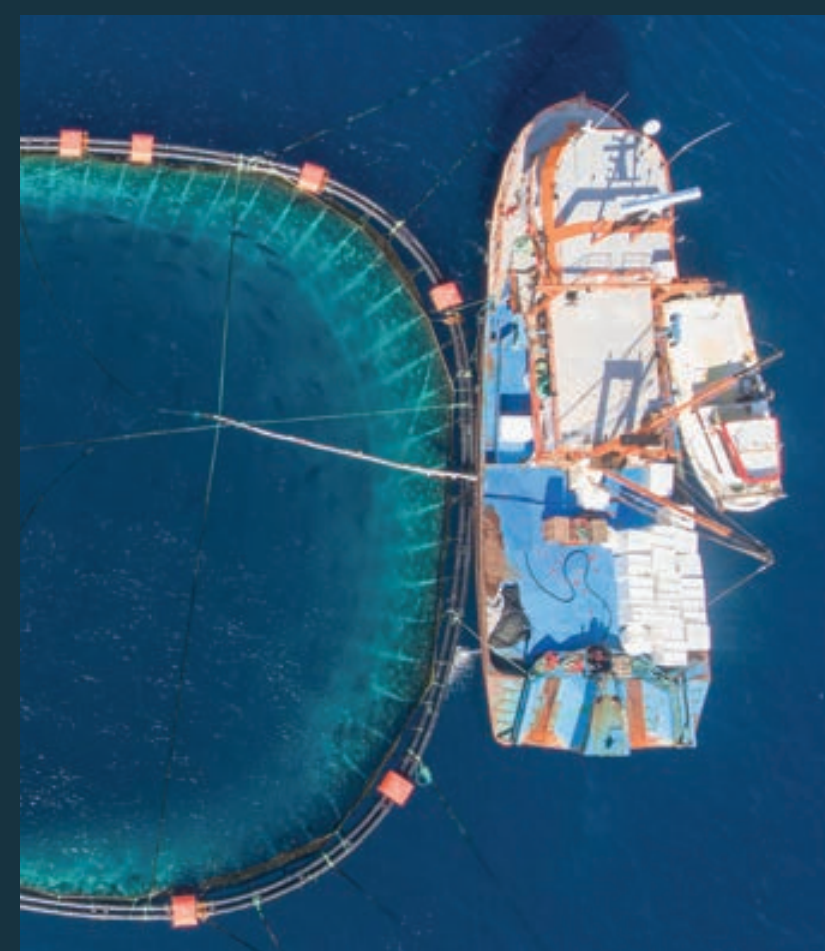
A local and viable fish processing facility and distribution network to ensure locally caught product is accessible to local retailers, operators and consumers and that the region's reputation as a source of quality seafood is established.

Development Costs + Returns

Council lobbying and advocacy, along with investment into the business case as needed. Returns would be measured in operational success and increased retail returns.

Funding

Council fund business case — development by private investors and operators.



Credit: South Australian Tourism Commission

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

- Mini Golf
- Contemporary design
- Participation
- Enhancing experience
- Dunes

Aim

To enhance the regional tourism and participation offering, whilst reinforcing key regional tourism attributes.

Strategy + Management

To develop a contemporary mini golf offering alongside the Dunes clubhouse. Capitalising on the coastal location, established golf brand, management amortisation and developing a pathway to golf.

Outcome

A high quality experience that enhances the tourism offering and encourages local resident participation and activity.

Development Costs + Returns

Development budget of \$1M with potential savings in Council staff landscaping and subsidised accommodation for development contractors. Potential revenue exceeds \$300K per annum offering short pay back periods subject to utilisation targets being met.

Funding

Private investment and/or Council loan to be repaid over a 10 year period using revenue generated by the course and a % of Dunes rates.



Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

The Dunes Mini Golf Development Cost + Revenue Analysis

Assumptions	High Season (Dec-Apr)		Low Season (May-Nov)	
	Weekdays	Weekends	Weekdays	Weekends
Rounds (18 Holes)	25	100	10	25
	125	200	50	50
	500	800	200	200
	5000	8000	2000	2000
Total				17,000
Price per round	\$25	\$25	\$15	\$15
Per week	\$3,125	\$5,000	\$750	\$750
Per month	\$12,500	\$20,000	\$3,000	\$3,000
Per year (10 months)	\$125,000	\$200,000	\$30,000	\$30,000
Total				\$385,000
Indicitive development costs				\$1,000,000

Copper Coast Economic Development & Marketing Plan

Actions 2. Develop Tourism Offering

**Produce + Regional
Sustainability**
— Provenance
validation &
differentiation
— Product branding

Aim
To develop a regional provenance identity and value through collective brand development & sustainability programme.

Strategy + Management
To raise profile and provenance of regional produce through focus regional events and presence on local menus. To develop and implement a programme to accredit management, acknowledge provenance and target product premiums for key regional produce (ie grains + pulses). To form collective producer representative body/ committee to implement and manage.

Outcome
Trusted provenance, recognised quality differentiation, increased value adding motivation/activity.

Development Costs + Returns
— Programme development and management
— Programme delivery

Funding
— GRDC research funding
— Participant contribution
— Council coordination.



3

Actions

Deliver Health

Health and well-being and the services to which they relate in the region are an important differentiator and motivator in the economic development cycle, converting affinity to engagement. General health care provision and subsequent aged care services need to be effective, efficient and recognised for the quality and level of service provided.

Actions 3. Deliver Health

28 Copper Coast SA Retail Market Profile, April 2018, Deepend Services, plus relevant provider websites.

This requires appropriate levels of resource and collaboration between providers, along with focused advocacy amongst state and federal legislation and funding sources, to ensure regional health and well-being and its providers maintain and develop leadership with the local health network and the broader community.

The retirement and older population is and will continue to grow over the next 10-20 years. The table to the right summarises the current level of provision within the region and compares it to the current numbers of beds or units required along with making some broad projections as to the outlying years. This clearly illuminates a need and associated opportunity to invest in and develop an increased number of lifestyle villages and aged care homes within the region to encourage full life cycle engagement.

Facilities, Aged Care²⁸

Star of the Sea for the Aged, Wallaroo	70 rooms	\$300-400k per room
Parkview, Moonta Heath + Aged Care, Moonta	72 rooms	\$280-290k per room
Estia Health, Kadina	—	\$395k per room

Facilities, Retirement Village²⁸

Copper Coast Lifestyle Villages, Moonta	72 rooms, 3 vacant	\$250-315k per room
Y Hafen, Wallaroo (Council owned)	15 rooms	—
Lowenden Court, Moonta (Council owned)	12 rooms	—
Gannon Group, Moonta Bay	250 proposed rooms, 17 built (7 sold)	—
Camborne Retirement Estate, Kadina	10-15 rooms	\$199-265k per room
Northern Yorke Peninsula Homes Inc (Wontama, RSL + Goyder, Kadina)	29 rooms	—

Population over 65²⁸

Moonta	1,645 (35% of population)
Kadina	1,081 (23% of population)
Wallaroo	1,240 (31% of population)
Total	3,966 (30% of population)

Assumed 75% couples

Rooms/Units required over the next 20 years	2,500 approx
Assume 25% stay in homes, 25% return to Adelaide	1,250 approx
Current rooms/units available	290-523

Copper Coast Economic Development & Marketing Plan

Actions 3. Deliver Health

- ### Health Hub
- Focused services
 - Improved connectivity
 - Retirement facilities

Aim
To ensure the region possesses appropriate medical and retirement services to support the existing population and motivate increasing numbers to relocate to the region in retirement and beyond.

Strategy + Management
Identify and align key areas of need and opportunity within the medical and aged care system upon which to support proposals into the relevant authorities and advocate on their behalf, along with ensuring appropriate infrastructure is maintained to enhance the attractiveness of the region and its townships to an ageing population.

- Focus Services**
- Increased GP vs locums
 - Paramedics (24 hr service)
 - Expanded obstetrics
 - Mental health/drug use

- Improved hospital to aged care connectivity (incl home care)
- Geriatric nursing
- Lifestyle/retirement village

Outcome
The region is recognised as having a cohesive and collaborative health community, delivering appropriate and leading regional medical services resourced to accommodate significant seasonal demand along with particular focus on retirement through to aged care.

Development Costs + Returns
Time in advocacy and consultation.

Funding
Required investment from Health SA and Country Health SA.



Copper Coast Economic Development & Marketing Plan

Actions 3. Deliver Health

29 Local Government Area Projections 2011-2031, South Australian Department of Planning, Transport and Infrastructure Feb 2016.

Lifestyle + Aged Care

- Focused services
- Retirement facilities

Aim
To ensure the region possesses lifestyle and retirement services to support the existing population trends and motivate increasing numbers to relocate to the region in retirement and beyond.

Strategy + Management
Confirm and agree targeted supply requirements, establish conditions conducive to third party developers to invest in the region and to support proposals into the relevant authorities and advocate on their behalf, along with ensuring appropriate infrastructure is maintained to enhance the attractiveness of the region and its townships to an ageing population.

Focus Development
High level review suggests a mid-term shortfall of lifestyle/retirement living options of up to 250 units or more.

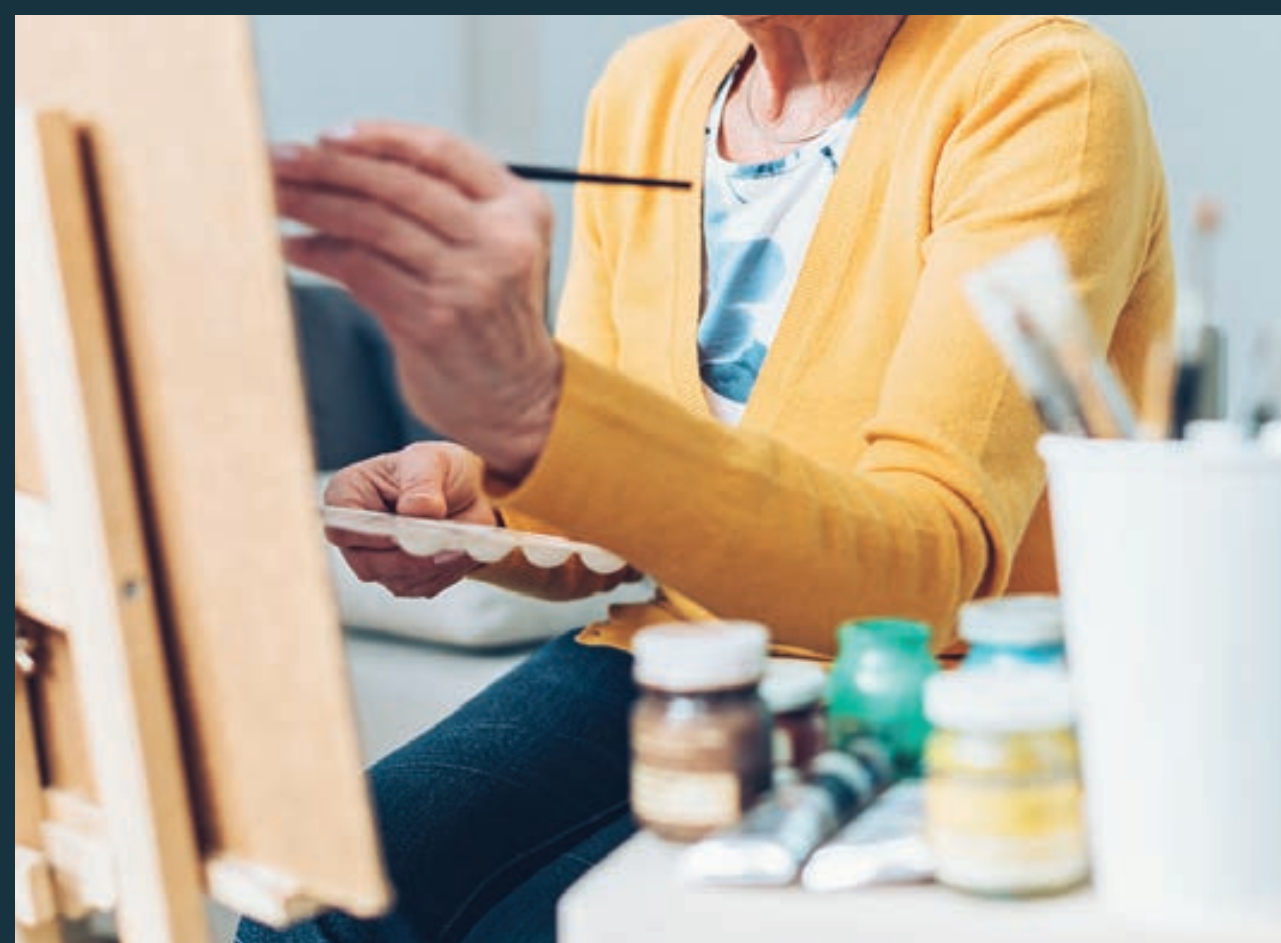
Alternatively, the population going forward indicates that between 2016 and 2031 the % of the population over 65 will increase by 1% every 5 years or an additional 150 people per period.²⁹

Outcome
Development of an additional or more lifestyle village(s)/retirement living facility within the region.

Development Costs + Returns

- Time in advocacy and consultation
- Infrastructure investment
- Project cost \$50M subject to scale
- Increased population, support services, rates etc.

Funding
Infrastructure investment/commercial investment.



Copper Coast Economic Development & Marketing Plan

Actions 3. Deliver Health

³⁰ Extrapolation from Wallaroo Shores development data, Monopoly Property Group, email 9/10/18, Ben Howard/Alex Paior.

Aged Care Lifestyle Village Cost Analysis³⁰

	250 units	750 units
Current shortfall (Next 20 years)		
Build cost	\$150,000	\$200,000
Direct FTEs per unit	1.71	1.71
Direct taxes (state + federal)	\$10,000	\$10,000
Direct wages	\$50,000	\$60,000
Stamp Duty	\$15,000	\$20,000
Rates	\$833	\$833
500 unit build cost	\$37,500,000	\$500,000,000
FTEs per unit	427.5	427.5
Direct taxes (state + federal)	\$2,500,000	\$3,000,000
Direct wages	\$12,500,000	\$15,000,000
Stamp Duty	\$3,750,000	\$500,000,000
Rates	\$208,250	\$208,250
750 unit build cost	\$112,500,000	\$150,000,000
FTEs per unit	1,283	1,283
Direct taxes (state + federal)	\$7,500,000	\$9,000,000
Direct wages	\$37,000,000	\$45,000,000
Stamp Duty	\$11,250,000	\$15,000,000
Rates	\$624,750	\$624,750

4

Actions

Generate Investment

All economic development planning must encourage and be supported by investment, sourced internally and attracted externally. Commercial investment must be justified primarily on a financial returns basis rather than social or non-economic measures, whilst public investment will take a broader view.

Copper Coast Economic Development & Marketing Plan

Actions 4. Generate Investment

Forecast population growth will increase Council revenue by just over \$4.5M over the next ten years through unadjusted rates or over \$5M allowing for annual rate increases of 2.9%, however the majority of this will be required to maintain and provide core regional infrastructure and services.

Population Growth Forecast

Year	Population (2.34% growth)	Over 65 population (1% growth every 5 years)	Population increase from previous year	Annual rate income per head of population	Rate revenue from population increase	Annual rates incl. 2.9% p.a increase	Rate revenue from population increase incl. 2.9% rate increase	2.9% rate increase value
2017	14,470	25% above 65	331	\$1,281	\$423,822	\$1,281	—	—
2018	14,808		339	\$1,281	\$433,740	\$1,318	—	—
2019	15,155		347	\$1,281	\$443,889	\$1,356	\$456,762	\$12,873
2020	15,510		355	\$1,281	\$454,276	\$1,396	\$481,006	\$26,730
2021	15,873	26% above 65	363	\$1,281	\$464,906	\$1,436	\$506,537	\$41,631
2022	16,244		371	\$1,281	\$475,785	\$1,478	\$533,424	\$57,639
2023	16,624		380	\$1,281	\$486,918	\$1,521	\$561,737	\$74,819
2024	17,013		389	\$1,281	\$498,312	\$1,565	\$591,553	\$93,241
2025	17,411		398	\$1,281	\$509,973	\$1,610	\$622,952	\$112,979
2026	17,819	27% above 65	407	\$1,281	\$521,906	\$1,657	\$656,017	\$134,111
Total revenue					\$4,713,528			\$554,023

Copper Coast Economic Development & Marketing Plan

Actions

4. Generate Investment

³¹ Community Equity Capital, The Opportunities and Challenges of Growth, Ben Thornley Director Dec 2010.

³² https://www.natcapsolutions.org/LASER/LASER_Community-Equity-Investment-Fund.pdf

There are several alternative mechanisms for accessing and managing funds, including community equity funds and angel investor schemers, all of which should be considered alongside direct investment, private and public.

“Community development venture capital funds are a potentially powerful tool for targeted job creation, providing equity capital to proven entrepreneurs and the growing businesses already located within the community and employing workers.” However, “the operational and structural idiosyncrasies of many such funds have the potential to constrain this model. It may be more difficult for funds to achieve stated objectives if they are required to invest in low income communities, within set geographic boundaries, they have limited capital, or they are managed by partners with little experience in the private equity industry.”³¹

Community equity investment funds have been developed in several jurisdictions including Nova Scotia³², Canada with varying degrees of success. Critical features in this case included;

- Incorporation in a not for profit status offers protection from outside investors and concentration on local financial opportunities.
- Minimise operational expenses through volunteers with financial and business expertise.
- Partnerships with people or firms that specialise in particular fields of investment.
- General management competence and necessary financial controls.

The challenge remains in identifying funding sources, convincing fund holders of the benefits of releasing them and establishing the required structures with which to manage them.

In addition, key regional infrastructure investment must be prioritised and the benefits to the economy and community associated with each of them demonstrated.

Copper Coast Economic Development & Marketing Plan

Actions 4. Generate Investment

Agricultural Fund — Value adding enterprises — Regional entrepreneurs

Aim

To gain a better understanding of regional funding availability³³ and develop a mechanism/structure/governance to allow it to be managed to support regional development and alternative businesses, whilst generating competitive returns for the contributors/unit holders.

Strategy + Management

Review potential structures and formats with leading financial institutions and develop a proposal to present to potential investors. Subsequently engage relevant expertise to establish, facilitate and manage the fund, subject to demand and scale.

Outcome

A market leading development which provides investment to regional projects through unlocking accumulating funds within the regional economy, either through a community equity fund or an angel investor scheme.

Development Costs + Returns

Subject to review project by project — significant investment, long term returns.

Funding

Council funded review followed by commercial terms for equity holders/investors.

³³ Australian Government, Department of Agriculture and Water Resources, Farm Management Deposit Scheme, established to respond to the vagaries and cycles of agricultural production whilst significant are not accessible for alternative investment structures. August 2018 statistics detail \$913M held in South Australian deposits by authorised deposit-taking institutions.



Copper Coast Economic Development & Marketing Plan

Actions 4. Generate Investment

Infrastructure — Prioritised projects — Management — Funding

Aim

To identify and prioritise a series of infrastructure projects that will positively and materially impact the regional economy through service, experience, business and brand support provision, in addition to the maintenance and development of core regional infrastructure (ie roads, footpaths, waste, waste water treatment, parks, gardens, public buildings etc).

Strategy + Management

Identify and pursue 6 key projects through advocacy, consultation and partnerships supported by relevant business cases and development strategies.

Proposed Focus Projects

1. Moonta Mines hub
2. Wallaroo footbridge
3. Kadina — tertiary education facilities
4. Seafood processing facility
5. Lifestyle village
6. Wallaroo Shores completion
7. Mini golf — Dunes



Credit: Callum Jackson

Copper Coast Economic Development & Marketing Plan

Actions 4. Generate Investment

Outcome

Development and completion of targeted projects that will positively impact the economic and cultural development of the region.

Development Costs + Returns

Subject to review project by project — significant investment, long term returns.

Funding

Combination subject to project of Council, State, Federal and private funding.

Wallaroo Footbridge³⁴

The development of the Wallaroo Marina was an ambitious and iconic development. Following a number of ownership iterations, whilst still possessing several vacant allotments, it is beginning to appear completed and occupied. The development created a 3.5km fissure in the township separating North Beach and the central business district of the town, limiting the ability of permanent and in particular seasonal visitors from influencing trade.

The proposed footbridge that has been indicatively designed and costed, would reconnect the consumers to retailers and would have very limited impact on boat movements.

³⁴ Wallaroo Marina Crossing Consultation 2018_V1



Credit: South Australian Tourism Commission



5.

Strengthen Education

The opportunity to develop the education offering in the region resides primarily within tertiary course provision, re-purposing facilities and partnering with key institutions. The goal of doing so is to contribute to the growth of the region through educating and retaining the next generation.

Copper Coast Economic Development & Marketing Plan

Actions 5. Strengthen Education

³⁵ Mayor Paul Thomas, meeting 6th September 2018.

³⁶ Mayor Paul Thomas, meeting 6th September 2018.

³⁷ University of Adelaide, Beacon of Enlightenment, Strategic Plan 2013-2023.

Anecdotally, the region loses more than 60 tertiary age students per annum to study in Adelaide and beyond with less than 15% returning to the area upon course completion.³⁵ Furthermore, the average age of nursing staff in the region is greater than 55 with no apparent succession plan in place and secondary students with interest in farming generally enrol in Urrbrae College to finish their studies followed by enrolling in Adelaide University courses at the Waite Institute or Roseworthy College.³⁶

The provision of regionally based nursing and farm management courses in particular, in conjunction with the University of Adelaide through a combination of local presence and the use of modern education technology, including MOOCS (Massive Open Online Learning Courses), would reinforce the historic ties between the institution and the region, provide a legitimate pathway for local students to develop their careers and remain in the region as well as generating economic returns through employment, asset utilisation and community up-skilling.

The University of Adelaide's strategic plan 2013-2023 (Beacon of Enlightenment)³⁷ details 7 goals, three of which are particularly relevant to the tertiary education opportunities within the region.

Reach out to a still broader student body

- Providing flexible learning and e-learning to meet new student needs.
- Articulating pathways and support for the disadvantaged.
- Expanding internationally in innovative ways.

Embolden our focus on learning and teaching excellence

- Recapturing the excitement of discovery in teaching.
- Simulating the small cohort experience.

Rekindle our importance to the community

- Showing how our research addresses problems of critical public concern.
- Communicating vividly our success in producing independent, educated leaders.

The development of tertiary offerings in conjunction with the Copper Coast community would support the University in achieving these goals.

Copper Coast Economic Development & Marketing Plan

Actions 5. Strengthen Education

Tertiary Hub — Nursing — Agriculture

Aim

To investigate the opportunity to develop, with the support of tertiary education providers, a regional hub for nursing and agriculture management undergraduate study, along with agriculture technology research and testing, based in repurposed facilities in Kadina and Paskeville.

Strategy + Management

To actively engage the leading South Australian tertiary institution, Adelaide University, to explore opportunities to develop the proposed regional hub.

Outcome

Tertiary facilities and undergraduate study courses provided regionally which meet demand in the market and encourage regional youth to remain/return to the region for and following tertiary studies.

Development Costs + Returns

Initially limited to review followed by repurposing costs if applicable, along with advocacy time. Significant returns relating to youth education and retention, along with employment through regional education provision.

Funding

Council funded review followed by commercial terms for equity holders/ investors. Potential investment support for repurposing existing facilities subject to ownership.



Other Considerations

As with all plans they cannot be static, but sufficiently malleable, to adapt and respond to changes, issues and opportunities as they present themselves. The economic environment is in a constant state of flux; State and federal public policy changes regularly through election or in response to perceived or real electoral need and new ideas, good and bad, percolate to the surface regularly.

Copper Coast Economic Development & Marketing Plan

Other Considerations

- Cruise Ships to Wallaroo
- Tree Climb & Wave Pool
- Mining
- Government Policy
- Wallaroo Marina Petrol Provisions
- Council Amalgamations

The current landscape includes the potential of significant regional investment through mooted federal government immigration policy, boosts for small businesses via the Australian Business Securitisation Fund³⁸ and state government regional development focus. In addition, the tertiary education platforms are constantly evolving with the launch of the UniHub in Port Pirie in early 2019 and the on-again-off-again merger discussions between the University of Adelaide and the University of South Australia.

Regionally, ideas and opportunities are omnipresent including the pending cruise ship Wallaroo arrival, tree climb and wave pool developments, a vegan festival, pedal bars at the Moonta mine and a variety of Wallaroo Marina items, including petrol provision for boats.

Not all of these ideas nor all the potential infrastructure needs within the region, have been explored in this plan. A comprehensive ‘needs audit’ across the Yorke Peninsula would be a valuable complement and filter, helping to guide and prioritise development.

Importantly, a vigilant watch must be maintained on actual and proposed developments across the broader Yorke Peninsula region in particular and South Australia and Australia more broadly. The Rex Minerals Ltd Hillside Project in Ardrossan, currently under consideration, initially suggested it would generate 500 -1,000 jobs directly, and almost 1,500 jobs indirectly, along with over \$30M in annual contribution to the state economy.³⁹ But what impact would it have on the Yorke Peninsula brand should it proceed? In a world increasingly demanding clean traceable foods, would the presence of such a mine affect the ability of the region’s food producers to generate the returns and value add based on the quality and provenance of their offering? Or would the employment opportunities benefit the Copper Coast region with the proximity, amenity and lifestyle it offers potential workers sufficiently to outweigh any negative brand impact?

Development is not only based on outward looking thought, it must also be supported by some introversion. Delivering the region’s administrative requirements most efficiently, and generating the greatest return on rates possible must always be a priority for any form of government. Consideration should be given to the benefits, efficiencies and influence to be gained by merging or at least the sharing of services between the Copper Coast and Barunga West councils. A combined entity would become the 5th largest regional Council in South Australia in terms of population.⁴⁰

³⁸ Pg 1 + Pg 6, The Advertiser Wednesday November 14th 2018.

³⁹ <https://www.adelaidenow.com.au/business/rex8217s-hillside-copper-mine-to-drive-jobs-yorke-investment/news-story/9bd3ccb1a-c95132689ea837e5863450>

⁴⁰ Local Government Area Projections 2011-2031, South Australian Department of Planning, Transport and Infrastructure Feb 2016.

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Other Considerations



Economic Development Timeline

Copper Coast Economic Development & Marketing Plan

Economic Development Timeline

Recommendation	Partners	Timeframe			
		2018/19	2019/20	2020/21	2021/22
Economic Development Plan	Council, community & commerce	•			
Brand + marketing plan	Council, community & commerce	•	•		
Launch marketing campaign			•	•	•
Tourism					
Moonta Mines					
Development Plan + governance	National Trust, YP Tourism, RDA, Council	•			
Funding/grants	National Trust, Council	•			
Build			•		
Launch	National Trust			•	
Events					
Kernwek Lowender — New	Management, commerce, YP Tourism, Council	•	•	•	•
YP Field Days	Management, commerce, YP Tourism, Council	•	•		•
Service					
Audit	YP Tourism, RDA	•			
Programme launch	RDA		•		
Annual implementation	RDA			•	•
Seafood					
Feasibility/Business case	PIRSA, Clean Seas, Council	•			
Develop facility	Clean Seas, Council		•		
Commence operations	Clean Seas			•	•
Mini Golf					
Develop IM/Proposal document	Council, Dunes Management		•		
Build + open	Private operator		•	•	
Commercial operations	Private operator			•	•

Copper Coast Economic Development & Marketing Plan

Economic Development Timeline

Recommendation	Partners	Timeframe			
		2018/19	2019/20	2020/21	2021/22
Produce					
Develop provenance strategy	Ag operators	•			
Establish trial participants	Ag operators	•			
Source/funding	GRDC	•			
Develop + launch programme	Ag operators, management committee		•		
Annual programme delivery	Ag operators, management committee		•	•	•
Health					
Hospital					
Agree priority developments to advocate	Hospital, LHN, Council	•			
Advocate for state + federal government	Hospital, LHN, Council	•	•	•	•
Permanent paramedics	Hospital, LHN, Council	•			
Aged Care/Lifestyle					
Support improved home care services	Council, providers		•		
Agree target capacity requirement	Council, providers	•			
Secure commercial development/partner	Providers	•			
Build & operate required facility	Providers		•	•	•
Education					
Tertiary Hub					
Develop connection	Adelaide University, Council	•			
Develop rationale	Adelaide University, Council	•			
Develop business case	Adelaide University, Council	•	•		
Launch	Adelaide University			•	
Deliver courses	Adelaide University			•	•

Copper Coast Economic Development & Marketing Plan

Economic Development Timeline

Recommendation	Partners	Timeframe			
		2018/19	2019/20	2020/21	2021/22
Investment					
Wallaroo footbridge tender	Council	•			
Wallaroo footbridge build	Contractor		•		
Review community equity fund	Council		•		
Launch & operate community equity fund	Stakeholders, Council			•	•
Other					
Amalgamation					
Explore opportunity	Council		•		
Implement recommendations	Council			•	•

Conclusion

The Copper Coast Economic Development Plan and incorporated Marketing Plan was developed with three guiding principles;

- Common Good;
- Focus; and
- Accountability.

Copper Coast Economic Development & Marketing Plan

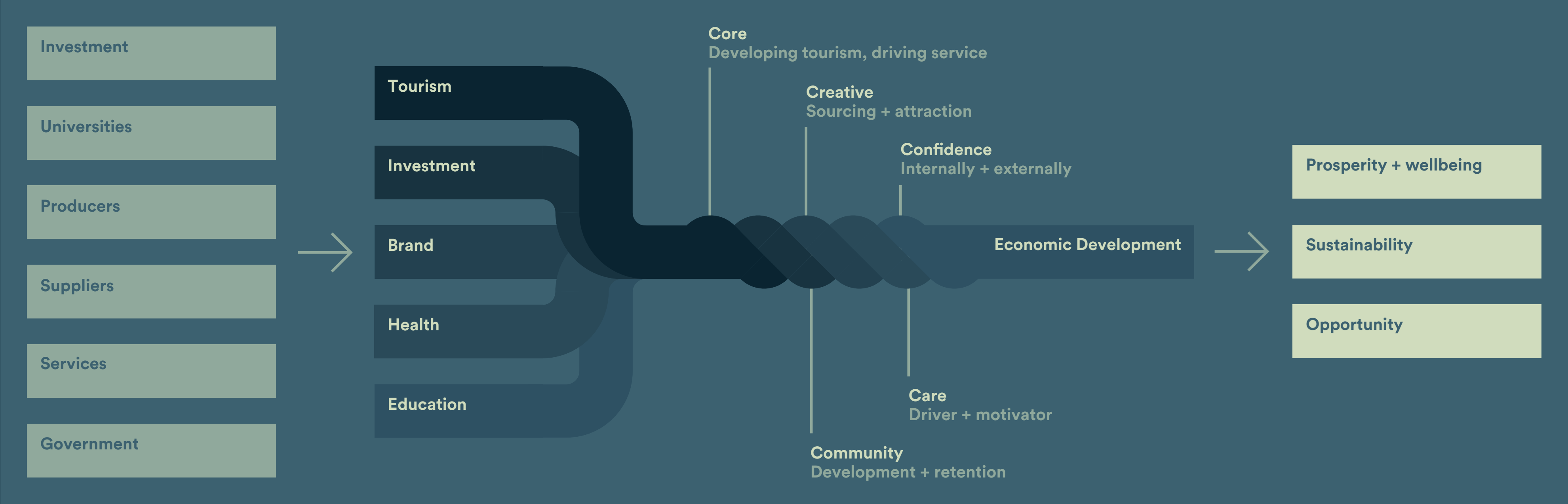
Conclusion

Its aims were to establish regional interest, community leadership and prioritise deliverables, understanding that these would be delivered by collaborative interaction between the community and commercial interests, encouraging existing visitors to stay longer and spend more and ensuring that activity and performance were measured and critically assessed.

The process identified a small but present spirit of negativity weaving its way repeatedly through the regional narrative, limiting the region's ability to achieve its potential.

The principle of common good must be promoted, understood and valued by the community such that it rises above the small but weighty influence of insular and narrow-minded negativity.

The plan focuses on four pillars and a defined brand proposition upon which the future prosperity and sustainability of the region will be built including; tourism, health, investment and education. Unlike silos or traditional pillars the structure of thinking adopted in the plan is completely intertwined.



Copper Coast Economic Development & Marketing Plan

Conclusion

Below these principles, aims and pillars a series of recommendations have been made for actions and investments to drive the regional development, both leveraging existing attributes and values and developing new offerings. Each recommendation includes aims, strategy, outcomes, costs and responsibilities.

The recommendations all require and reinforce the fundamental need for collaboration and communication between commerce and community to activate the plan. Calling to mind the spirit of a state of mind, a way of thinking and a call to action which led to the project nomenclature 'precious time.'

The Copper Coast region and community has the potential to develop into an increasingly significant regional player and voice in the South Australian and Australian economy should it collectively choose to accept the challenge. This plan sets targets of a population of more than 20,000 in 2031 and visitation of three quarters of a million per annum, delivering a gross regional product approaching \$1 billion, achieved through innovative, value adding, community minded actions.

'Precious' as a descriptor is subjective and hence its value is in the eye of the beholder or stakeholder. 'Time' and its passing is inevitable and irretrievable. The timely recognition of the value, quality and opportunity inherent in the region by its community will lay the foundation for its future prosperity, well-being and sustainability, making now a 'precious time' for the Yorke Peninsula's Copper Coast.

Copper Coast Economic Development & Marketing Plan

Appendices

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