SOUTH AUSTRALIAN
CENTRE FOR ECONOMIC STUDIES
ADELAIDE & FLINDERS UNIVERSITIES

Regional Development Australia Yorke and Mid North

Overview

Geography

- RDA Yorke and Mid North covers an area of 34,883 square kilometres or 3.5 per cent of the State's land mass. The area designated as agricultural land is 97 per cent of the region.

Population

- As at 30th June 2010 the region had a population of 76,549 persons or 4.7 per cent of the State's population. The Indigenous population was 1.7 per cent, just above the overall State average.

Economy and Labour force

- The region contributed $2,201 million to the State economy in 2006/07 or 3.2 per cent of gross state product.
- The unemployment rate is a full percentage point below that for the State at 4.3 per cent while the labour force participation rate is some 6 percentage points below that for the State.
- The region has an above average rate for VET participation and is close to the State average for full-time secondary school participation (Region 76.4 to South Australia 78.4) but the NAPLAN results are 12 points lower at year 3 and 6 points lower at year 7 relative to the State average (set to 100).
- The three largest employing industries are agriculture (20.7 per cent), retail trade (15.1 per cent), and health and community services (12.5 per cent). Manufacturing is also significant across the region in terms of employment and gross value added.

Opportunities for growth

- The region is home to the Clare and Gilbert Valley with an international reputation for premium wine and tourism.
- Emerging agricultural and horticultural industries, tourism and as a retirement location provide the region with "clean, green" export prospects and a source of population growth.
- Energy industries including wind farms and geothermal wells are already situated in the region, there is on-going mineral exploration and opportunities to advance minerals processing.
- The aquaculture industry while relatively small has growth potential; employment growth is expected in health and community services, retail, manufacturing and residential housing construction.

Education and Skills

- The region reports labour and skill shortages and unemployment is below the State average. However, the workforce participation rate is 6 to 8 per cent below the State average which suggests hidden unemployment, a perception that there are few job vacancies and the need to create greater access to training for all ages.
- While the region has seasonal variations in the employment demand this can be addressed by further investment in skills training, business management and entrepreneurship.

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Indicators[1]

Geography and Population

	RDA Yorke and Mid North	South Australia
Geography		
Land area - square kilometres (includes unincorporated areas)	34,883	985,292
Land area as a percentage of the state - per cent	3.5	100.0
Area of agricultural land (2006) - hectares '000	3,397	55,408
Demographics		
Total population (2010) - all persons	76,549	1,640,638
Males (2010) - all males	38,460	810,264
Females (2010) - all females	38,089	830,374
Change in population (2001-2010) - per cent change	5.0	9.0
Change in population (2001-2005) - per cent change	1.0	2.8
Change in population (2005-2010) - per cent change	4.0	6.0
Population as a percentage of state population (2010) - per cent	4.7	100.0
Population density (2010) - persons/square kilometre	2.19	1.67
Birth rate (2010) - babies born per 1,000 people	10.0	12.2
Death rate (2010) - deaths per 1,000 people	11.3	7.9
Population projections (Dept of Planning and Local Government)		
2016	77,852	1,770,644
2021	79,179	1,856,435
2026	80,430	1,935,161
Projected change in population from 2011 to 2026 - per cent	5.4	16.1
CAGR for region, 2011-2026	0.4	1.0
Age profile (2010)		
0-14 years	18.4	17.8
15-24 years	10.5	13.6
25-34 years	8.9	13.0
35-44 years	12.0	13.6
45-54 years	14.6	14.0
55-64 years	14.8	12.3
65-74 years	11.2	8.0
75-84 years	6.9	5.3
85 years and over	2.6	2.3
Indigenous population (2006) - all persons	1,287	24,823
Indigenous population as a percentage of total population (2006) - per cent	1.7	1.6

Note: [1] All indicators exclude unincorporated areas of South Australia unless otherwise indicated.

Economy 2006/07

	Gross value[1] added ($m)		Gross value added - per cent of total gross regional product		Employment by industry - per cent of total employment	
	RDA Y&MN	South Australia	RDA Y&MN	South Australia	RDA Y&MN	South Australia
Agriculture, forestry and fishing	357	2,603	16.2	3.8	20.7	4.9
Mining	30	2,224	1.4	3.3	0.6	0.9
Manufacturing	279	8,815	12.7	12.9	9.8	13.4
Electricity, gas and water	49	1,884	2.2	2.8	0.7	0.9
Building and construction	147	4,432	6.7	6.5	6.5	6.6
Wholesale trade	72	2,765	3.3	4.0	3.4	4.4
Retail trade	138	3,829	6.3	5.6	15.1	14.9
Accommodation, cafes and restaurants	64	1,476	2.9	2.2	5.8	4.4
Transport and storage	78	3,270	3.5	4.8	3.0	3.9
Communication services	24	1,467	1.1	2.1	0.8	1.3
Finance and insurance	57	3,993	2.6	5.8	1.7	3.9
Ownership of dwellings	239	6,074	10.9	8.9	0.0	0.0
Property and business services	89	6,533	4.0	9.6	4.2	9.3
Public administration and defence	50	2,417	2.3	3.5	3.7	5.4
Education	113	3,144	5.1	4.6	7.9	7.6
Health and community services	150	4,974	6.8	7.3	12.5	13.1
Cultural and recreational services	14	1,039	0.6	1.5	0.8	1.8
Personal services	34	1,547	1.5	2.3	2.7	3.9
Total[2]	**2,201**	**68,327**	**100.0**	**100.0**	**100.0**	**100.0**

Note: 1 The sum of gross value added across all industries plus taxes less subsidies on products equals gross regional/state product at purchasers prices. Gross value added for each region has been estimated by EconSearch using input-output (I-O) models. For additional information on gross value added and definitions of key terms, see ABS, Australian National Accounts, Concepts, Sources and Methods, 2000, Cat. No. 5216.0.

2 Total does not include net taxes (i.e. taxes less subsidies on products and production) paid by households and other components of final demand. Therefore totals do not sum to 100 per cent.

Supportive Statistics

	RDA Yorke and Mid North	South Australia
Trade[1]		
Exports (2006/07) - $ billions	1.6	27.4
Imports, (2006/07) - $ billions	2.1	30.8
Labour force		
Labour force (June 2011)	34,126	861,537
Total employed (June 2011)	32,660	814,507
Total unemployed (June (2011)	1,466	47,030
Participation rate (2009)	57.5	63.1
Unemployment rate (June 2011) - per cent	4.3	5.5
Number of job service/disability employment service providers	47	450
Education		
Full-time participation in secondary school education at age 16 (2006) - per cent	76.4	78.4
Participation in VET courses (2009) - per 1,000 persons	84.5	73.5

Supportive Statistics (continued)

	RDA Yorke and Mid North	South Australia
NAPLAN results[2] (2011) – average score		
Year 3		
Reading	353	402
Spelling	347	392
Numeracy	340	379
Year 5		
Reading	424	478
Spelling	430	474
Numeracy	433	471
Year 7		
Reading	502	534
Spelling	502	533
Numeracy	502	535
Health (Selected LGAs)		
Low birth weight babies (2006 to 2008) - as a percentage of total births	6.9	6.8
Mothers who reported smoking during pregnancy (2006 to 2008) - per cent	23.5	16.7
Children fully immunised at 12 to less than 15 months of age (2008) - per cent	91.7	91.8
Obese persons 18 years and over[3] (2007-08) – per cent	20.2	17.4
Overweight (not obese) persons 18 years and over[3] (2007-08) – per cent	30.4	29.4
Housing characteristics		
Median house price (September quarter 2011) – Port Pirie	187,500	360,000
Dwelling fully owned (2006) – per cent	45.4	33.7
Dwelling being purchased (2006) – per cent	26.7	33.5
Dwelling being rented (2006) – per cent	21.2	25.6
Rent assistance from Centrelink (March quarter 2011) - per cent of population	6.1	6.5
Average residential valuation (2010) - $	218,031	344,446
Average rates per residential property (2010) - $	842	1,065
Income		
Average wage and salary income (2009) - $	35,587	41,896
Average own unincorporated business income (2009) - $	16,554	19,659
Average investment income[4] (2009) - $	7,433	7,651
Average superannuation and annuity income (2009) - $	21,943	24,793
Income support (Selected LGAs)		
Age pension recipients (2009) - per cent	79.0	77.5
Disability support recipients (2009) - per cent	11.3	7.1
Single parent payment recipients (2009) - per cent	6.4	5.8
Unemployment benefit recipients (2009) - per cent	5.7	4.5
Long-term unemployment benefit recipients (2009) - per cent	4.4	3.2
Youth Unemployment benefit recipients (2009) - per cent	9.3	6.1
Low income and welfare dependant families with children (2009) - per cent	10.2	9.5
Children in low income families (2009) - per cent	24.7	22.0
Health care card holders (2009) - per cent	11.5	8.8
Pensioner concession card holders (2009) - per cent	32.1	23.6
Total Centrelink card holders (2009) - per cent	35.3	26.8

Supportive Statistics (continued)

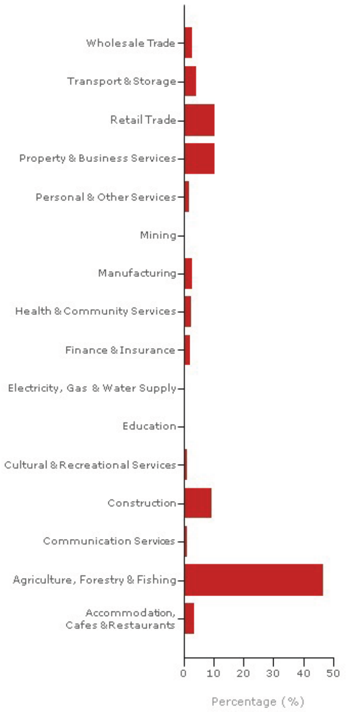
	RDA Yorke and Mid North	South Australia
Tourism[5]		
Day visitors (2011)		
Number of domestic day trips – (‘000)	793	10,472
Total expenditure by day trippers – $m	63	944
Average expenditure by day trippers – $	79	90
Number of overnight visitors (2011)		
Intrastate – (‘000)	467	3,150
Interstate – (‘000)	87	2,167
Domestic – (‘000)	555	5,315
International – (‘000)	8	530
Total – (‘000)	563	5,845
Number of nights stayed (2011)		
Intrastate – (‘000)	1,490	9,473
Interstate – (‘000)	265	8,669
Domestic – (‘000)	1,755	18,142
International – (‘000)	53	8,454
Total – (‘000)	1,808	26,596
Expenditure by overnight tourists		
Total domestic overnight expenditure (2011) - $m	179	2,922
Average expenditure by domestic overnight visitor (2011) - $	323	602
Characteristics of tourist establishments[6] (2011)		
Establishments (no.)	11	266
Rooms (no.)	252	12,652
Bed spaces (no.)	734	34,583
Persons employed (no.)	139	7,138
Occupancy rate (per cent)	59.5	62.4
Environmental		
Greenhouse gas emissions (2005/06) - tonnes per person	23.8	20.0
Airports		
Passengers per annum (2010/11)	NA	7,756,574
CAGR of passenger numbers (2000/01 – 2010/11)	NA	5.1
Gambling		
No. of electronic gaming machines (2009/10)	957	12,684
NGR (2009/10) - $/adult	518	571
Taxes (2009/10) - $/adult	141	222
No. of EGM's per 1,000 adults (2009/10)	16.1	9.9

Note:
1 The value of exports and imports at the regional level includes intrastate, interstate and international trade.
2 NAPLAN scores for Yorke and Mid North are based on a selection of DECS primary schools in Port Pirie, Kadina, Peterborough and Wallaroo. NAPLAN results are reported using a common scale ranging from 0 to 1000 for years 3, 5, 7 and 9, the scale is divided into ten bands ranging from band one (lowest achievement) to band 10 (highest achievement) as students progress to higher year levels the national minimum standard band level increases reflecting the greater complexity of skills assessed. For more information on interpreting NAPLAN results see www.naplan.edu.au
3 Chronic disease and risk factor estimates not shown for Orroroo/Carrieton as it contains a population less than 1,000, estimates of obese and overweight persons for other LGAs are based on synthetic predictions using 2001 NHS data.
4 Investment income includes: interest from financial institutions, net rent and dividends or distributions (including imputation credits) from an Australian company, corporate unit trust or public trading trust and distributions from trusts.
5 Tourism data on day visits, overnight visits, number of nights stayed, expenditure and characteristics of establishments is based on regional boundaries according to the South Australian Tourism Commission (SATC) and these differ slightly from Regional Development Australia boundaries (see regional and state profiles at http://www.tourism.sa.gov.au for maps of regions according to the SATC).
6 Accommodation includes hotels, motels and guest houses and serviced apartments with 5 or more rooms or units; holiday flats, units and houses of letting entities with 15 or more rooms or units; caravan parks with 40 or more powered sites and visitor hostels with 25 or more bed spaces. The breakdown of tourist establishments by type of accommodation e.g. hotels, motels, guest houses, bed and breakfast etc. is not available.

Summary graphs – businesses and employment by occupation

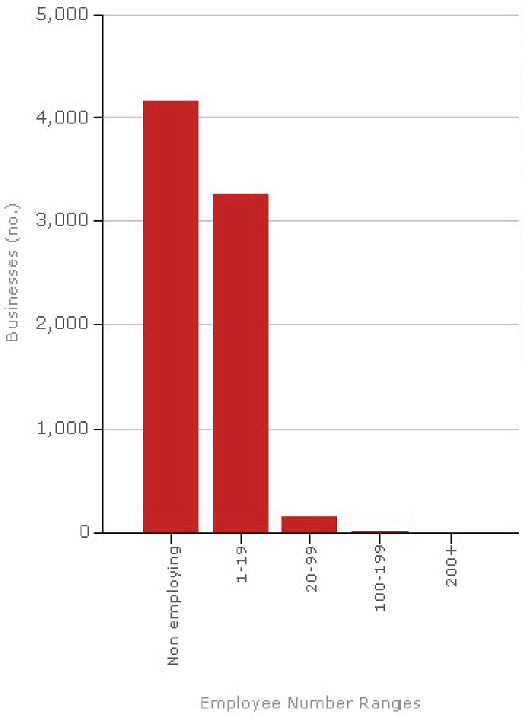
Figures 1 through 4 show data on the number of businesses by industry sector, number of businesses by employee ranges, number of businesses by turnover range and top five occupations by persons employed relative to South Australia.

Figure 1: Number of businesses by industry – RDA Yorke and Mid North, 2006/07



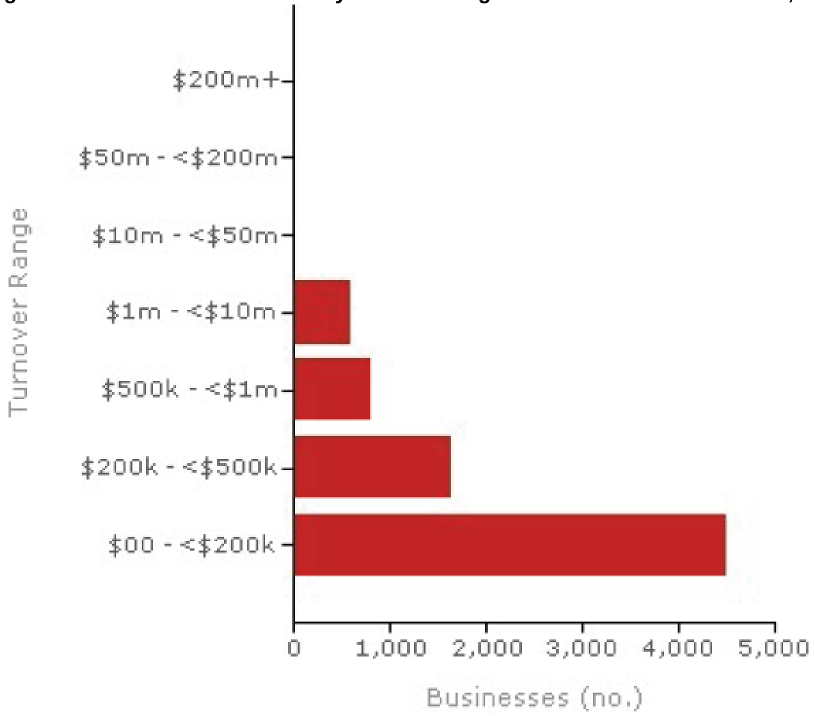
Note: Adheres to the Australia New Zealand Standard Industry Classification (ANZSIC) 2006, ABS Cat. No. 1292.0. Businesses can operate in more than one state/territory. This data uses the main location determined for the business. For more information on the data source, please refer to the explanatory notes accompanying the Yorke and Mid North EasyData profile, at the Department of Manufacturing, Innovation, Trade, Resources and Energy regarding number of businesses by industry (boundaries for the Yorke and Mid North State government region correspond with Regional Development Australia Yorke and Mid North boundaries).
Source: EasyData (ABS, Cat No. 8165.0, Counts of Australian businesses, including entries and exits, Jun 2003 to Jun 2007).

Figure 2: Number of businesses by employee ranges – RDA Yorke and Mid North, 2006/07



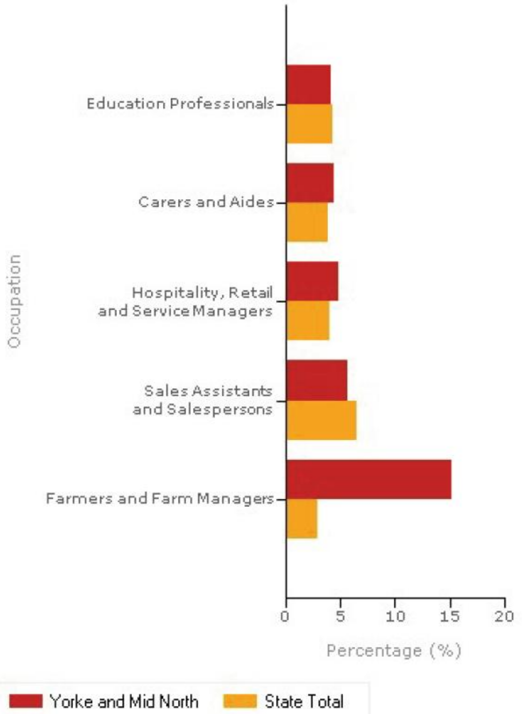
Note: Businesses can operate in more than one state/territory. This data uses the main location determined for the business. For more information on the data source, please refer to the explanatory notes accompanying the York and Mid North EasyData profile, at the Department of Manufacturing, Innovation, Trade, Resources and Energy regarding number of businesses by employee ranges (boundaries for the Yorke and Mid North State government region correspond with Regional Development Australia Yorke and Mid North boundaries).
Source: EasyData (ABS, Cat. No. 8165.0, Counts of Australian Businesses, including entries and exits, Jun 2003 to Jun 2007).

Figure 3: Number of businesses by turnover range – RDA Yorke and Mid North, 2006/07



Note: Businesses can operate in more than one state/territory. This data uses the main location determined for the business. For more information on the data source, please refer to the explanatory notes accompanying the Yorke and Mid North EasyData profile, at the Department of Manufacturing, Innovation, Trade, Resources and Energy regarding the number of businesses by turnover range (boundaries for the Yorke and Mid North State government region correspond with Regional Development Australia Yorke and Mid North boundaries).
Source: EasyData (ABS, Cat No. 8165.0, Counts of Australian Businesses, including entries and exits, Jun 2003 to Jun 2007).

Figure 4: Persons employed by Occupation (top 5) – RDA Yorke and Mid North, 2006/07



Note: Adheres to the Australia New Zealand Standard Classification of Occupation (ANZSCO) 2006, ABS Cat. No. 1220.0 Presented at the Sub-Major Group (or 2-digit) level. Applicable to employed persons only.
Source: EasyData (ABS, Census of Population and Housing, 2006).

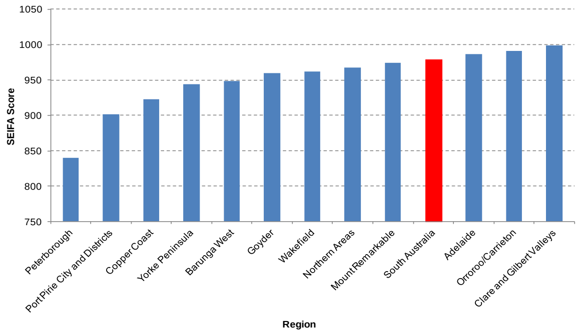
Indicators for local government areas

Figures 5 through 16 show selected indicators for Regional Development Australia Yorke and Mid North (RDAYMN) local government areas taken from the Public Health Information Development Unit (PHIDU) InstantAtlas. For comparison South Australia and metropolitan Adelaide are included in each graph. Brief commentary is provided of key trends or stand out characteristics in the data.

Clare and Gilbert Valleys and Orroroo/Carrieton are ranked highest in terms of the Socio-Economic Index for Areas (SEIFA) scoring 999 and 991 respectively, all other LGAs are ranked below the South Australian average (979) and metropolitan Adelaide (987), (refer to Figure 5).

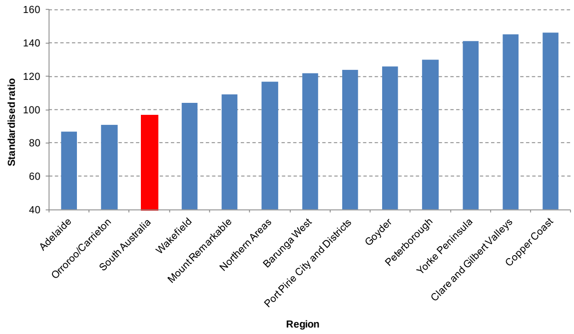
Based on a standardised ratio VET participation is highest in Copper Coast (146) followed by Clare and Gilbert Valleys (145), compared to 97 in South Australia and 87 in metropolitan Adelaide, (refer to Figure 6).

Figure 5: Index of relative socio-economic disadvantage, 2006



Source: PHIDU InstantAtlas.

Figure 6: Participation in VET Standardised ratio, 2009



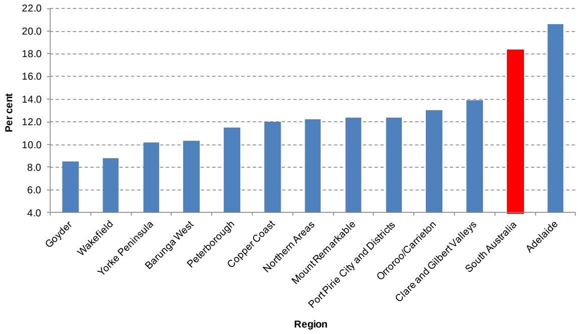
Source: PHIDU InstantAtlas.

Professionals comprise a smaller proportion of the workforce in LGAs of RDAYMN compared with South Australia and metropolitan Adelaide where they comprise 18.4 per cent and 20.6 per cent respectively, conversely workers identifying themselves as labourers (in agriculture and manufacturing) are more common in the LGAs relative to South Australia and metropolitan Adelaide; (refer to Figures 7 and 8).

Orroroo/Carrieton has the highest proportion of the workforce employed in agriculture, forestry and fishing (38.8 per cent) followed by Barunga West (35.3 per cent) and Goyder (33.7 per cent). In Port Pirie agriculture, forestry and fishing employs 5.2 per cent of the workforce with other sectors such as manufacturing and services employing significant numbers, (refer to Figure 9).

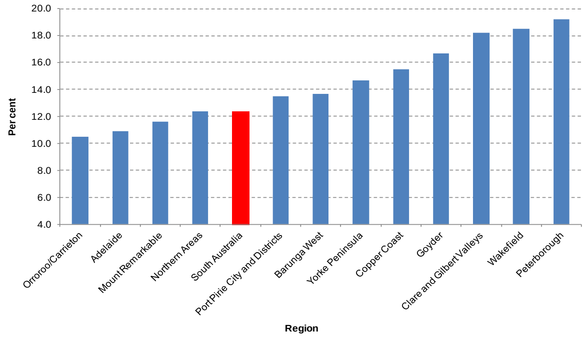
Peterborough has the highest proportion of low income families with children receiving income support (21.2 per cent) compared with 9.5 per cent across South Australia and 9.3 per cent in metropolitan Adelaide, (refer to Figure 10).

Figure 7: Occupation – Professionals
Per cent of workforce employed as professionals by local government area, 2006



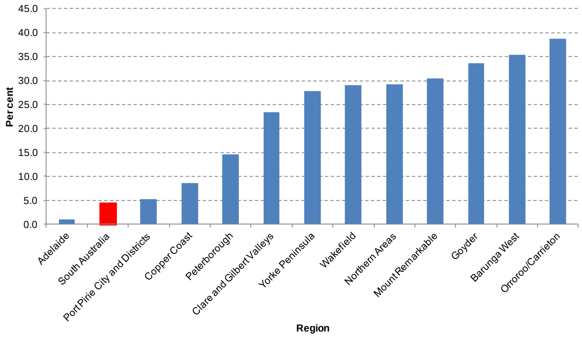
Source: PHIDU InstantAtlas.

Figure 8: Occupation – Labourers
Per cent of workforce employed as labourers by local government area, 2006



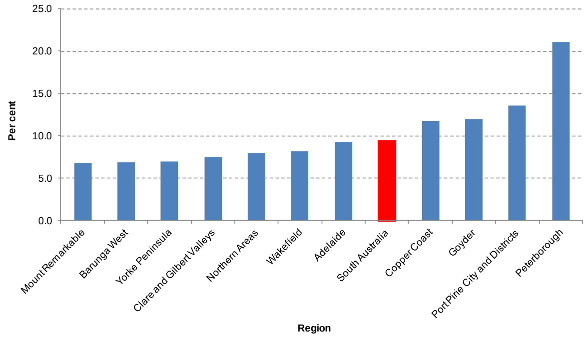
Source: PHIDU InstantAtlas.

Figure 9: Industry – Agriculture, forestry and fishing
Per cent of workforce employed in agriculture, forestry and fishing, 2006



Source: PHIDU InstantAtlas.

Figure 10: Income support recipients
Per cent of welfare dependent and other low income families with children, 2009



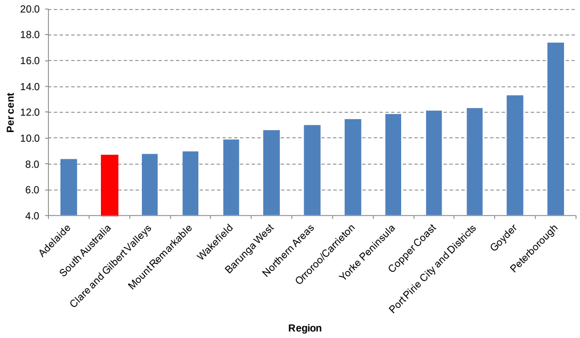
Source: PHIDU InstantAtlas.

Residents claiming Centrelink benefits such as, *inter alia,* the aged pension and allowances are automatically entitled to a health care card. The proportion of people holding a health care card is above the South Australian average (8.7 per cent) and metropolitan Adelaide (8.4 per cent) for all LGAs in RDAYMN, (refer to Figure 11).

Unskilled and semi-skilled workers comprise a larger proportion of the population in all LGAs relative to South Australia (18.2 per cent) except in Mount Remarkable (17.1 per cent) and Orroroo/Carrieton (14.2 per cent), (see Figure 12).

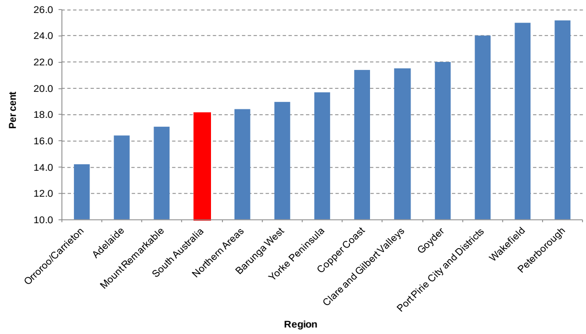
Participation in full-time secondary school education at age 16 is highest in Barunga West (96.2 per cent) compared with the South Australian average (78.3 per cent) and metropolitan Adelaide (79.6 per cent), (refer to Figure 14).

Figure 11: Health care card holders
Per cent, 2009



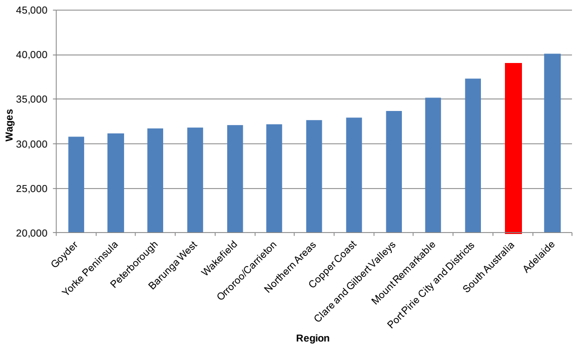
Source: PHIDU InstantAtlas.

Figure 12: Unskilled and semi-skilled workers
Per cent, 2006



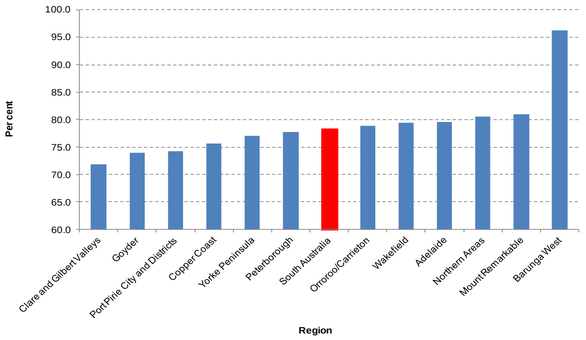
Source: PHIDU InstantAtlas.

Figure 13: Wages per capita
Dollars, 2005/06



Source: PHIDU InstantAtlas.

Figure 14: Education
Full-time participation in secondary school education at age 16, Per cent, 2006

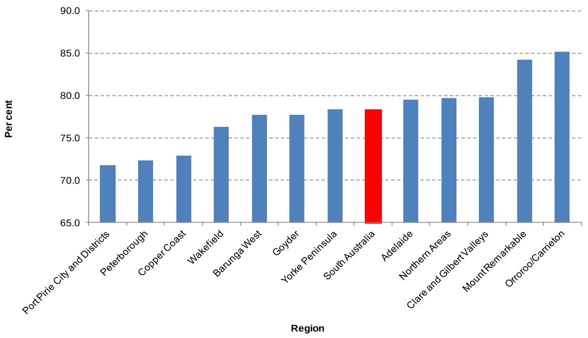


Source: PHIDU InstantAtlas.

The proportion of persons learning or earning at ages 15 to 19 is above the South Australian average (78.4 per cent) and metropolitan Adelaide (79.5 per cent) in Orroroo/Carrieton (85.2 per cent) followed by Mount Remarkable (84.2 per cent), Clare and Gilbert Valleys (79.8 per cent) and Northern Areas (79.7 per cent), (refer to Figure 15).

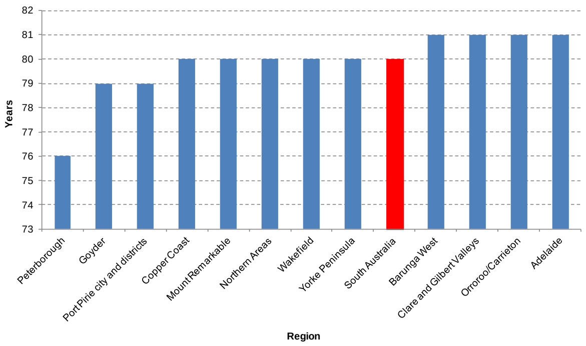
Median age at death in all LGAs in RDAYMN is similar to the South Australian average (80 years) and metropolitan Adelaide (81 years).

Figure 15: Learning or earning
Per cent of 15 to 19 year olds either working or studying, 2006



Source: PHIDU InstantAtlas.

Figure 16: Median age at death, 2003 to 2007



Source: PHIDU InstantAtlas.

About the Yorke Peninsula and Mid North regional plan

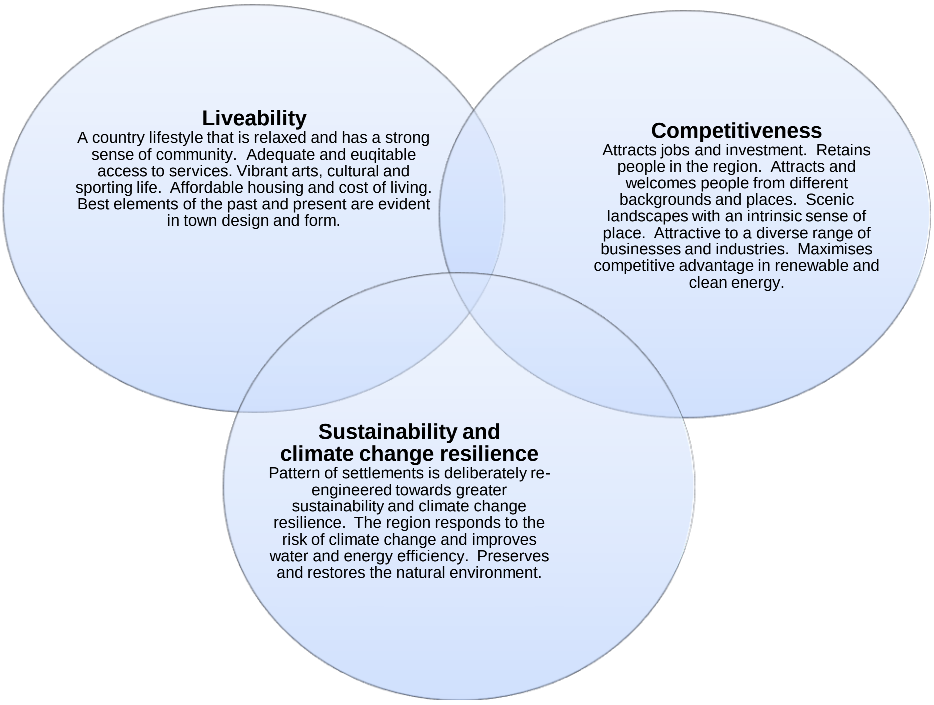
The Yorke Peninsula regional plan and the Mid North regional plan sets out the objectives of both regions, helping state and local governments to plan for the provision of essential services and infrastructure and guide sustainable economic development and land use.

The plan supports the achievement of a range of economic, social and environmental goals and is closely aligned to South Australia's State Strategic Plan, such that achieving regional goals and targets supports the achievement of state-wide objectives. In addition, regional plans tie into state-wide plans for infrastructure, housing, water, natural resources management, waste management and South Australia's economic statement.

The plan has three overlapping objectives representing sustainable community development; these objectives are classified as; social, economic or environmental,

- Social - to maintain and improve liveability
- Economic - to increase competitiveness
- Environmental - to drive sustainability and resilience to climate change

Figure 5: Objectives of the regional volumes of the South Australian planning strategy



Source**:** Mid North Regional Plan, May 2011, Volume of the South Australian Planning Strategy.

Region at a glance[1]

The RDAYMN region covers an area of 34,883 square kilometres comprising eleven local government areas and one unincorporated area.

Local government areas:

- Barunga West;
- Clare and Gilbert Valleys;
- Copper Coast;

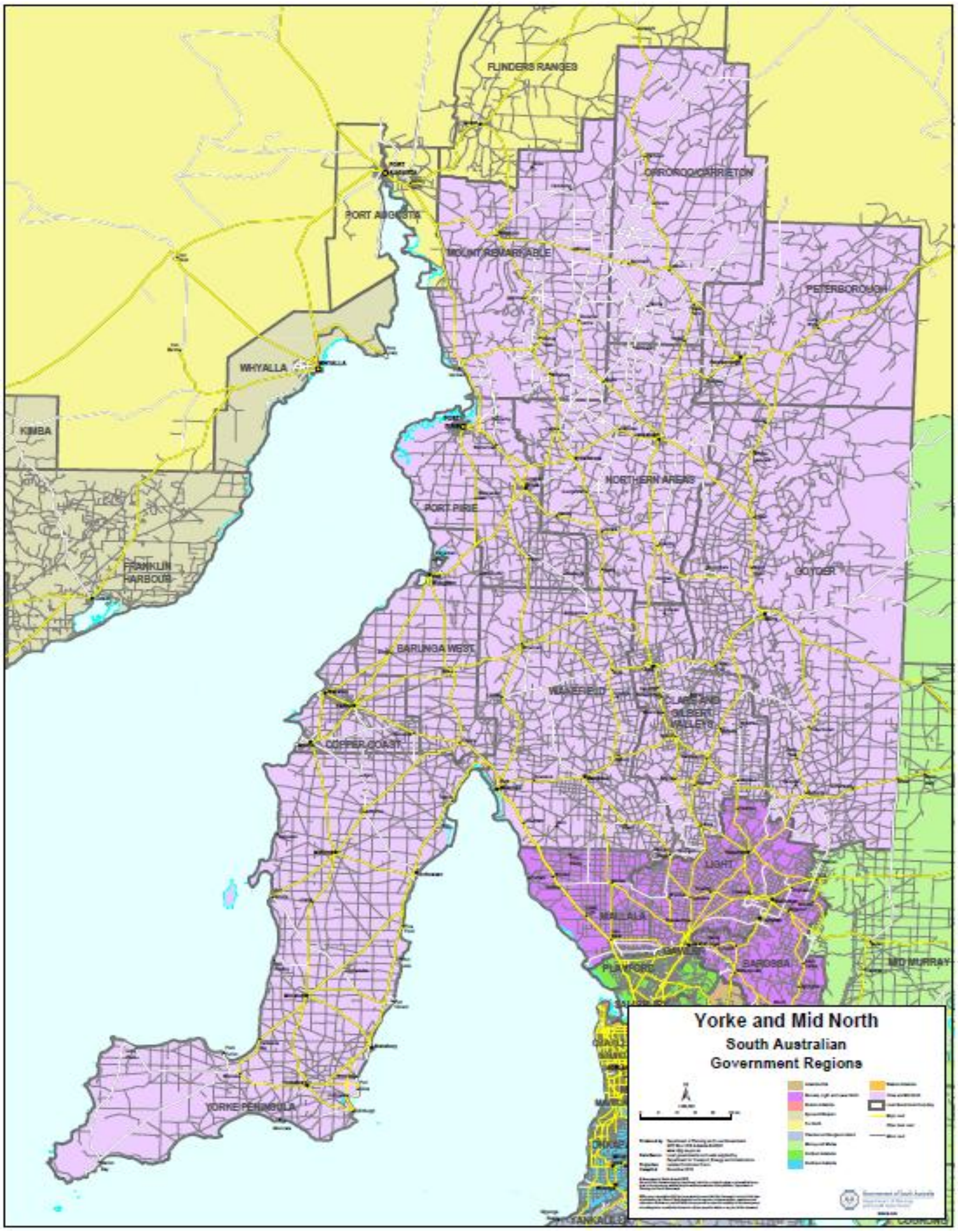
[1] Descriptions, facts and key issues relating to the RDA Yorke and Mid North region are sourced from the Regional Roadmap 2011-2013, the Mid North Region Plan (May 2011) and Yorke Peninsula Regional Land Use Framework (December 2007).

- Goyder;
- Mount Remarkable;
- Northern Areas;
- Orroroo Carrieton;
- Peterborough;
- Port Pirie;
- Wakefield; and
- Yorke Peninsula.

Unincorporated area:

- Unincorporated Yorke.

Figure 6: Map of Regional Development Australia Yorke and Mid North



Source: Department of Planning and Local Government of South Australia.

Facts about the Yorke and Mid North region

- Has an estimated resident population of 76,549 persons (ABS, 2010, preliminary estimate).
- Has an agricultural based economy focused on viticulture, primary production of field crops and emerging agricultural activities such as hay and livestock processing, intensive farming, animal husbandry and horticulture.
- Contains the Provincial City of Port Pirie with an estimated resident population of 12,300 (ABS, 2012, preliminary estimate), economic activity in the city depends on production from its silver, lead and zinc smelters.
- Is a popular tourist destination for South Australians attracting one million visitors annually.
- Contains several important sea ports at Wallaroo, Ardrossan, Port Giles and Klein Point used to export local produce such as grain.

Box 1: Additional information about Yorke and Mid North

- Contains extensive grape vineyards around the Clare Valley which is recognised as a premium wine growing region.
- Has a large seasonal workforce because of the predominance of industries such as agriculture, viticulture and hospitality.
- Has approximately half of the State’s wind energy capacity with potential for further development of geothermal and wave energy.
- Has a growing mining industry with a number of companies exploring the Yorke Peninsula for gold and copper.

Source: Skills for Jobs, The Training and Skills Commission’s Five Year Plan for Skills and Workforce Development, 2011.

Key Issues for the region

Workshops held with representatives of councils the Natural Resource Management Board, Regional Development Board and various State Government departments identified strengths, weaknesses, opportunities and threats with regards to future land use and development. Together these issues can be grouped under four themes, (A) environment and culture, (B) economic development, (C) population and settlements and (D) infrastructure and services.

Underlying each theme are principles and policies (e.g, as in A: Climate Change) to help realise the region’s vision and full potential. Issues, challenges, opportunities and barriers highlighted in the RDAYMN Regional Roadmap are grouped under each of the four themes and commentary is drawn from the RDA Roadmap (as in A.1, A.2, B.1 etc).

A. Environment and culture – Principles and policies

- *Recognise and protect the region’s environmental assets;*
- *Ensure efficient use of water and energy;*
- *Protect people, property and the environment from exposure to hazards;*
- *Ensure management of waste, wastewater and stormwater;*
- *Identify and protect places of heritage and cultural significance and desired town character; and*
- *Create the conditions for the region to adapt and become resilient to climate change.*

A.1 Climate change – Issues identified in RDA Roadmap

- Reduced future availability of potable water caused by declining rainfall and higher evaporation rates putting urban water security at risk.
- Adverse impacts on the region's wine industry due to shrinking fertile areas suitable for growing grapes around the Clare Valley caused by declining rainfall.
- Adverse impacts on the local seafood industries, especially the local prawn industry, caused by rising sea temperatures and ocean acidity levels.
- Significant costs to agriculture in the form of increased pest plants, animals and diseases and costs to tourism in the form of lost eco-tourism amenity value.
- Need for agricultural and fishing industries to adopt new management practices to mitigate against the effects of changing climatic conditions.

A.2 Water – Issues identified in RDA Roadmap

- Current water resources have already reached or are reaching their sustainable limits as outlined in the Northern and Yorke Natural Resources Management Plan (2009).
- Major water users (as identified in the Tonkin report) include viticulture, agriculture, mineral processing, general industry, municipal watering, tourist facilities and domestic users.
- Planned population expansion combined with additional commercial and industrial development will require alternative sources of water including: reuse of wastewater and urban storm water, small scale desalination and domestic rainwater capture; to supplement the current use of surface and groundwater systems.
- Fourteen projects are now currently being planned or implemented to reuse stormwater.
- River and creek systems are in poor condition and overuse of water resources is resulting in falling groundwater levels and rising salinity.
- Better use of water resources requires a change in human behaviour requiring education on the value of water saving.

B. Economic development – Principles and policies

- *Provide serviced and well-sited industrial land to meet projected demand;*
- *Retain and support ongoing defence industries operations;*
- *Retain and strengthen the economic potential of high quality agricultural land;*
- *Expand intensive livestock production and processing between Snowtown and Hamley Bridge;*
- *Strengthen local aquaculture and fishing industries;*
- *Safeguard mineral resources and encourage further exploration and mining;*
- *Reinforce the region as a preferred coastal and nature-based tourist destination*
- *Focus commercial development in key towns and ensure it is well-sited and designed;*
- *Realise efficiencies in waste management and foster the resource recovery industry; and*
- *Foster alternative energy and water supply industries.*

B.1 Renewable energy – Issues identified in the RDA Roadmap

- The region has four operational wind farms possessing half the state's wind power generation capacity, a fifth wind farm is under construction and two are proposed.
- Licenses for geothermal 'hot rocks' energy exploration extend from the regions of Wakefield, Barunga West and Port Pirie districts to Mintaro and Hallet, seven geothermal wells are located in the region.
- Coastal areas of Yorke Peninsula are suited to wave energy power generation.

B.2 Mining – Issues identified in RDA Roadmap

- Principal mining activities include extraction of limestone, dolomite, gypsum and sand.
- Although mining remains small in terms of contribution to gross regional product and employment, extensive minerals exploration and a number of new start up mines will increase the contribution and importance of mining over the next several years.
- Growth of the resources sector in the adjacent Flinders Ranges and Far North will have flow on effects for the Yorke and Mid North requiring skilled labour in the construction and operation of mines.
- The Yorke Peninsula is strategically located with potential to become a mineral processing centre and port of export for ore and concentrate extracted in surrounding regions.

B.3 Tourism – Issues identified in RDA Roadmap

- Visitors are drawn to coastal towns on the Yorke Peninsula, the Clare Valley and Flinders Ranges by natural tourist experiences and close proximity to Adelaide (2 to 3 hours by car).
- Most visitors are intrastate tourists travelling from other parts of South Australia; only a small share of tourists comes from interstate and overseas.
- Improving tourist experiences to encourage greater tourist traffic relies on further development of tours, accommodation, restaurants, events and raising consumer awareness of the regions attractions both domestically and internationally.

B.4 Agriculture – Issues identified in RDA Roadmap

- Agricultural land is suited to broad acre farming and supports large scale food processing and food value-adding of seafood, poultry, organic food, legumes, pulses, grains and oil seeds.
- Although rainfall and climatic conditions are suited to agriculture there is scarcity of fresh water resources, inhibiting diversification into water intensive crops and leaving current producers vulnerable in times of drought.
- Over the last ten years agriculture has shifted from broad acre farming into new sectors such as animal husbandry, feed lots, horticulture and wine production, reducing reliance on traditional grain crops as the main source of economic activity.
- Viticulture is confined to 260 grape growers in the Clare Valley; some grape production occurs in the Southern Flinders Ranges although the industry in this region is still in its infancy.
- The recent drought has forced some farmers to exit the industry and encouraged the consolidation of ownership of farms and vineyards reducing the number of smaller farms.

- Skilled agricultural workers are in short supply because of changing technology, high training delivery costs, a shortage of experienced trainers and lack of an established training culture.

B.5 Aquaculture – Issues identified in RDA Roadmap

- Oysters have been commercially grown in the region for a number of years, although the industry remains small comprising approximately thirty operations.
- Potential exists for further expansion of aquaculture across a broader range of seafoods.

B.6 Forestry – Issues identified in the RDA Roadmap

- The region accounts for approximately one per cent of Forestry SA's timber production and supports 50 local jobs, timber is harvested from two primary reserves at Wirrabara and Bundaleer and four smaller reserves at Yarcowie, Leighton, Crystal Brook and Redhill.
- Viability of forestry plantations is reduced by the small scale, isolation from major markets, adverse growing conditions and competition from the building industry timber sector.

C. Population and settlements – Issues identified in RDA Roadmap

- *Reinforce the role, functionality and vibrancy of towns and settlements;*
- *Strategically plan and manage township growth, with coastal areas a priority;*
- *Design towns to provide safe, healthy, accessible and appealing environments; and*
- *Provide residential land to enable a supply of diverse, affordable and sustainable housing to meet the needs of current and future residents and visitors.*

C.1 Population – Issues identified in RDA Roadmap

- The majority of residents live in large regional centres including Port Pirie, Kadina, Moonta, Clare and Wallaroo or smaller town centres with one to two thousand people.
- Approximately 30,000 residents are dispersed across remote settlements and rural centres containing less than 1,000 people.
- The South Australian State Strategic Plan (2007) and Yorke and Mid North Regional Planning Strategy (August 2010) notionally commits to a population growth target of 25,000 additional people or 925 additional people per year up to 2036.
- Key target groups include, 'Tree and Sea changers' (retirees), 'Returning Locals' (former residents moving back to the region), 'Opportunity Seekers' (those looking for a different lifestyle or change in employment) and 'Following Partners' (joining family members already in the region).
- Between 2001 and 2006 all local government areas recorded positive net movement of people to the region except for Peterborough (losing 52 residents) and Orroroo/Carrieton (no change).
- The Indigenous population is concentrated around Port Pirie, the Copper Coast and Port Pearce settlement comprising two per cent of the total population. The Indigenous demographic profile is characterised by a high birth rate and a skewed age profile towards younger people aged under 30 years which provides a key labour force asset if Indigenous youth are assisted into employment.

C.2 Education, skills and unemployment – Issues identified in RDA Roadmap

- High school completion rates and people holding university qualifications are below state averages.
- There are no universities operating in the region.
- TAFESA is the main Registered Training Organisation operating three campuses on the Yorke Peninsula and three campuses in the mid-north acting as a primary provider of education and skills training and development within the region.
- An upgrade and expansion to Clare's TAFE campus is needed to offer better quality and greater variety of courses.
- Skills shortages are most acute in retail and hospitality and trades, high wages in the mining industry has made it increasingly difficult for local employers to compete and find skilled workers.
- Improved coordination between training programs offered at the regional level and federal level is needed to allocate educational facilities and resources more efficiently.
- Skills development is driven by South Australian Works Networks linking disadvantaged people to training and jobs providing them with foundation skills and basic numeracy and literacy training.
- Five Trade Training Centres (TTC) established by the Education Revolution Program help students achieve year 12 or an equivalent qualification, providing education that is relevant and training opportunities that encourage completion of their education.
- Establishment of Trade Schools for the future (TSF) allows year 12 students greater flexibility to combine SACE studies with VET through school based apprenticeships and traineeships.
- The rate of regional unemployment is consistently lower than the state unemployment rate although the gap has narrowed in recent years, between June 2010 and June 2011 unemployment grew faster than the state average because of the effects of drought and slower overall growth in the region.
- Retail and hospitality, health and community services and manufacturing will provide the bulk of new employment opportunities.

D. Infrastructure and services provision – Principles and policies

- *Protect and build on the region's strategic freight transport, storage and processing infrastructure*

D.1 Infrastructure – Issues identified in RDA Roadmap

- Growth in residential housing construction has been led by retirees looking for a lifestyle change and improved quality of life, resulting in the construction of new homes especially in coastal areas such as Port Vincent, Black Point, Wallaroo, Moonta and Marion Bay.
- Demand for housing will increase with the expansion of Primo Smallgoods by 200 employees and the establishment of new poultry facilities at Port Wakefield encouraging new residents to the region.
- Public transport in and out of the region is insufficient to service the large geographical spread of small townships.
- Private bus services are not financially viable leaving private coachlines as the main means of public transport in and out of the region.

- Community bus and car services are prioritised, inadequate and operate at inconvenient times during the day excluding many residents from using the service for travel to and from work.
- New wind farm developments are under consideration or being constructed to support base load power generation capacity currently supplied by gas and coal.
- Current natural gas pipeline infrastructure is insufficient to meet the demands of new developments in Port Pirie and Whyalla, duplication of the existing pipe from Whyte Yarcowie is required costing $45 to $50 million.
- Large businesses are discouraged from investing in the region because costs associated with joining the national electricity transmission network in regional towns are prohibitive.
- Fourteen water reuse infrastructure projects are planned or underway to capture and reuse storm and wastewater.
- Broadband internet infrastructure is limited, lack of coverage requires most residents to rely on slower dial-up connections and approximately 50 per cent of residents have no internet connection.

Major projects

The following section contains a list of major projects in the RDAYMN region which have been approved, are in progress or are under consideration as outlined in the South Australian government's Major Developments Directory 2011/12.

Yorke Peninsula

Project title:	Hillside Copper Project
Organisation:	Rex Minerals Limited
Project details:	Located 12 km south of Ardrossan on the Yorke Peninsula the Hillside Copper Project resource is estimated at 1.5 million tonnes of copper and 1.4 million ounces of gold. Prefeasibility studies are scheduled for completion in mid 2012 with a Bankable Feasibility Study completed by 2013. Production is scheduled for 2015 providing feasibility studies are favourable and required permits can be obtained.
Project cost:	$650 million to $800 million
Estimated completion date:	June 2015
Status:	Prefeasibility study in progress

Project title:	Ardrossan West 132kV Substation Rebuild and 2 x 25 MVA Transformer Capacity increase.
Organisation:	ElectraNet Pty Ltd
Project details:	Current capacity of existing transformers is inadequate to meet forecast peak demand and the requirements of the South Australian Electricity Code. ElectraNet will augment connection point transformer capacity by replacing the two existing 10 MVA 132/33 kV transformers with two 25 MVA units along with other secondary systems and selected plant.
Project cost:	$19.0 million
Estimated completion date:	June 2012
Status:	In progress

Project title:	Ceres Project
Organisation:	Suzlon Energy Australia Pty Ltd
Project details:	Construction of up to 180 wind turbines producing 600MW. Power will be supplied to Adelaide via a submarine connection across the Gulf of St Vincent supplying enough electricity to power 225,000 homes every year saving 2,600 million litres of water had power been produced from a coal fired source. The project also involves the construction of a biomass pilot plant converting biomass into electricity and feeding into the national grid.
Project cost:	$1.3 billion
Estimated completion date:	Late 2015
Status:	In approval process

Project title:	The Dunes, Port Hughes
Organisation:	Quickview Pty Ltd
Project details:	A residential and resort development surrounding a Greg Norman designed golf course. Stage 1 will be completed by 2014 at an estimated cost of $100 million.
Project cost:	$750 million
Estimated completion date:	December 2020
Status:	In progress

Mid North

Project title:	Hummocks Transformer Upgrade
Organisation:	ElectraNet Pty Ltd
Project details:	Replacement of two existing 10 MVA 132/33 kV transformers with two 25 MVA units and upgrade of aging equipment in switchyard.
Project cost:	$11.0 million
Estimated completion date:	November 2013
Status:	Pending

Project title:	Clinton Coal to liquid (CTL) Project
Organisation:	Syngas Limited
Project details:	The Clinton Project is located 120km northwest of Adelaide and would produce 14,600 barrels of ultra clean diesel over the 30 year life of the project. Syngas has signed a Memorandum of Understanding with the China National Electric Equipment Corporation (CNEEC) establishing the basis for CNEEC's provision of engineering, procurement and construction services. CNEEC will also provide access to 85 per cent of funding for the project with the remaining 15 per cent funded by Syngas.
Project cost:	$3 billion
Estimated completion date:	Under review
Status:	Under consideration

Project title:	Barn Hill Wind Farm
Organisation:	AGL Energy Limited
Project details:	Proposed construction of 62 wind turbines, on-site-infrastructure, overhead export power line and new connection facility at Barn Hill Wind Farm in the Barunga Ranges.

Project cost:	$350 million
Estimated completion date:	2014
Status:	Under consideration

Project title:	Hornsdale Wind Farm
Organisation:	Investec Bank Australian Ltd
Project details:	Development of a 300MW capacity wind farm North of Jamestown is underway. Project managers are in discussion with potential purchasers of power and renewable energy certificates.
Project cost:	$950 million
Estimated completion date:	Mid 2014
Status:	Under development

Project title:	Mt Bryan Wind Farm (Hallet 3)
Organisation:	AGL Energy Limited
Project details:	Proposed construction of up to 33 wind turbines near Mt Bryan, on-site substation, overhead export power line and connection works at Mokota substation.
Project cost:	$180 million
Estimated completion date:	2013
Status:	Under consideration

Project title:	Waterloo Substation Replacement
Organisation:	ElectraNet Pty Ltd
Project details:	Replace aging equipment at the Waterloo Substation site and install two new transformers to increase capacity.
Project cost:	$41.0 million
Estimated completion date:	November 2013
Status:	Under consideration

Project title:	Robertstown Wind Farm
Organisation:	TRUenergy
Project details:	Proposed development of an 80-MW wind farm, number of turbines yet to be determined.
Project cost:	$250 million (estimated)
Estimated completion date:	Not available
Status:	Under consideration

Project title:	Snowtown Wind Farm Stage 2
Organisation:	TrustPower Australia Holdings Pty Ltd
Project details:	Proposed development of a 220MW wind farm with approximately 100 wind turbines and a 28km 275 kV electrical connection into the national power grid near Snowtown 140km north of Adelaide.
Project cost:	$550 million
Estimated completion date:	2014
Status:	Under consideration

Project title:	Stony Gap Wind Farm
Organisation:	TRUenergy
Project details:	Proposed development of a 100MW wind farm at Stony Gap near Burra, with number of turbines yet to be determined.
Project cost:	$350 million (estimated)
Estimated completion date:	Not available
Status:	Under consideration

Project title:	The Bluff Wind Farm (Hallet 5)
Organisation:	AGL Energy Limited
Project details:	Construction of 25 turbines overhead export power line and connection works at ElectraNet's Belalie substation
Project cost:	$118 million
Estimated completion date:	End 2011
Status:	In progress

Project title:	Wakefield Water Pipeline
Organisation:	SA Water & Wakefield Regional Council
Project details:	Construction of a 47km mains water pipeline from the Upper Wakefield Storage, located west of Auburn through Balaklava and Bowmans to Port Wakefield.
Project cost:	$30.1m
Estimated completion date:	June 2014
Status:	Funding confirmed from Commonwealth, awaiting State contribution

Port Pirie

Project title:	Bungama Second 275/132 kV Transformer.
Organisation:	ElectraNet Pty Ltd
Project details:	Proposed installation of a second transformer at Bungama substation to ensure service standards in the Bungama, Baroota and Port Pirie areas continue to meet the requirements of the Electricity Transmission Code.
Project cost:	$10.0 million
Estimated completion date:	November 2015
Status:	Under consideration

Project title:	Port Pirie GP Plus Health Care Centre
Organisation:	SA Health
Project details:	Construction of GP Plus Health Care Centre in Port Pirie
Project cost:	$12.5 million
Estimated completion date:	June 2013
Status:	2011-12 Capital Investment Statement

Table 4: South Australian local government capital expenditure for 2011/12

Council	Local government expenditure 2011/12 ($)
District Council of Barunga	1,365,000
Clare & Gilbert Valleys Council	4,785,000
District Council of Copper Coast	361,000
Goyder Regional Council	8,350,000
District Council of Mount Remarkable	5,170,000
Northern Area Council	7,500,000
District Council of Orroroo/Carrieton	1,194,000
District Council of Peterborough	1,751,000
Port Pirie Regional Council	7,500,000
Wakefield Regional Council	4,607,000
District Council of Yorke Peninsula	Not Available

Source: South Australian Major Developments Directory 2011/12.

Appendix A

Selected Statistics: Labour market outcomes

Regional Development Australia Yorke and Mid North

Population	**RDA Yorke and Mid North**	**% of State Total**	**South Australia**
Estimated Resident Population (ERP): June 2010	76,549	4.7%	1,644,582
Net Change in ERP 2009 to 2010	693	-	20,992
Rate of Population Change (%)	0.9%	-	1.3%
			% of Total Population
Youth (15-24)	8,061	10.5%	13.6%
Mature (45-64)	22,509	29.4%	26.3%
Aboriginal – Census 2006	1,308	1.8%	1.7%
People with a disability (15-64) – Census 2006	1,811	4.2%	2.7%
Labour Force (Dept of Education & Workplace Relations: March 2011)			
Total Employed	32,053	-	812,100
Total Unemployed	1,394	-	47,200
Unemployment Rate	4.2%	-	5.5%
Participation Rate (June 2010)	54.9%	-	62.7%
Industry Employment (Census 2006)			**% of Total Employment**
Agriculture, Forestry and Fishing	5,708	20.4%	4.7%
Retail Trade	3,903	14.0%	14.7%
Health and Community Services	3,380	12.1%	12.7%
Manufacturing	2,736	9.8%	13.2%
Qualifications (Census 2006)			**% of Total Population (15 years and older)**
Degree or higher	3,573	6.2%	13.0%
Diploma	2,526	4.4%	6.5%
Certificate Level III or IV	8,261	14.4%	14.3%
Training (NCVER 2009)		**% of State Total**	
VET Students	6,199	5.1%	121,851
Students reporting Disability	7.6%	-	6.2%
Aboriginal Students	3.9%	-	3.6%
Commencing Apprentices and Trainees (2008)	907	4.1%	21,960

Source: data extracted from Workforce Wizard, DFEEST, November 2011.