City of Mount Gambier

MOUNT GAMBIER REGIONAL SPORT AND RECREATION CENTRE

ATTACHMENT A - SUPPORTING DOCUMENTS

RDA Limestone Coast Region

2011 Census results

Limestone Coast region

Comparison year: 2011

Benchmark area: Regional SA

Community profile reports Limestone Coast region

community profile

Table of contents

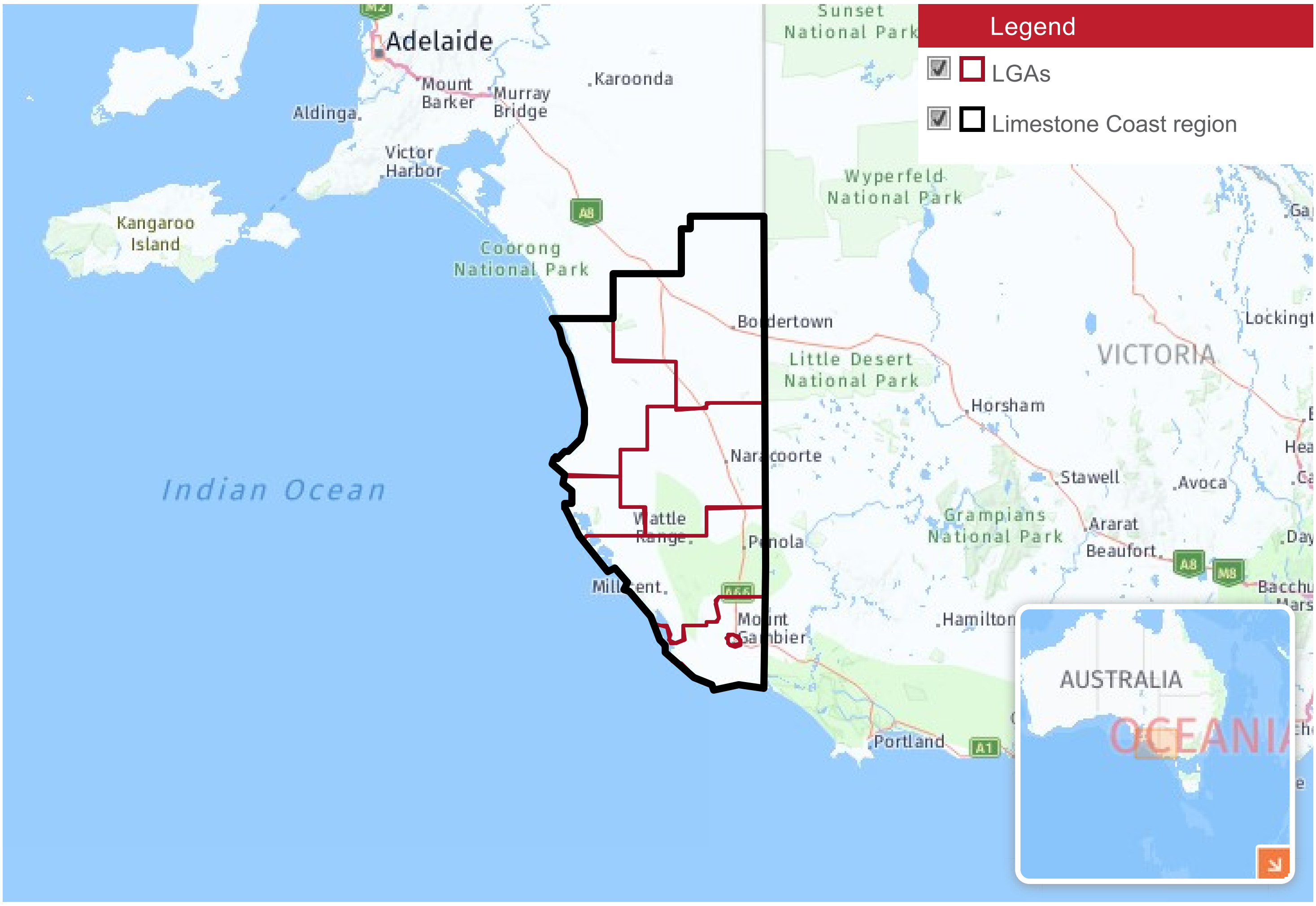
Welcome to the Limestone Coast region Community Profile

The Limestone Coast Region is located in the far south-east of South Australia, between 200 and 450 kilometres south-east of the Adelaide CBD, and between 400 and 500 kilometres west of the Melbourne CBD.
The Limestone Coast region Community Profile provides demographic analysis for the Region and its suburbs based on results from the 2016, 2011, 2006, 2001, 1996 and 1991 Censuses of Population and Housing. The profile is updated with population estimates when the Australian Bureau of Statistics (ABS) releases new figures.

Important Statistics	Population	Land area	Population density
	66,683	2,132,934	0.03
	ABS ERP 2016	ha (21,329 Km^2)	persons per hectare

Profile areas

Limestone Coast region



Compiled and presented in profile.id by .id, the population experts.

Limestone Coast region
Population highlights

Population
66,683
ERP, 2016
▲Grown by 211 from the previous year.

Estimated Resident Population Limestone Coast region

Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

◆ No significant change since previous Census (less than ±0.5%) ▲ Increased since previous Census
▼ Decreased since previous Census

Median age
42 ▲(2)

Regional SA	45 ▲
South Australia	40 ▲
Australia	38 ▲

Aboriginal and Torres Strait Islander Population
1.9% ◆(0.1%)

Regional SA	4.1% ◆
South Australia	2.0% ◆
Australia	2.8% ◆

Couples with children
26% ▼(-1.8%)

Regional SA	23% ▼
South Australia	27% ◆
Australia	30% ◆

Older couples without children
12% ▲(2.1%)

Regional SA	14% ▲
South Australia	11% ▲
Australia	10% ▲

Lone person households
28% ▲(0.7%)

Regional SA	28% ▲
South Australia	27% ◆
Australia	23% ◆

Medium and high density Housing
12% ▲(1.5%)

Regional SA	11% ▲
South Australia	22% ▲
Australia	27% ▲

Median weekly household income
$1,108 ▲($169)

Regional SA	$1,029 ▲
South Australia	$1,203 ▲
Australia	$1,431 ▲

Median weekly mortgage repayment
$255

Regional SA	$266
South Australia	$334
Australia	$409

Median weekly rent
$181

Regional SA	$192
South Australia	$268
Australia	$339

Households renting
27% ◆(-0.3%)

Regional SA	26% ▼
South Australia	28% ◆
Australia	29% ▲

Households with a mortgage
32% ▼(-1.4%)

Regional SA	29% ▼
South Australia	34% ◆
Australia	32% ▼

Overseas born
10% ◆(0.3%)

Regional SA	11% ◆
South Australia	23% ▲
Australia	26% ▲

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Language at home other than English

5% ▲(0.9%)

Regional SA	5% ◂▸
South Australia	16% ▲
Australia	21% ▲

University attendance

1% ◂▸(0.1%)

Regional SA	1% ◂▸
South Australia	5% ▲
Australia	5% ▲

University qualification

9% ▲(0.9%)

Regional SA	9% ▲
South Australia	19% ▲
Australia	22% ▲

Trade qualification (certificate)

24% ▲(2.2%)

Regional SA	23% ▲
South Australia	20% ▲
Australia	19% ▲

Unemployment rate

5.2% ◂▸(-0.1%)

Regional SA	6.6% ▲
South Australia	7.5% ▲
Australia	6.9% ▲

Participation rate (population in labour force)

60% ▼(-3.3%)

Regional SA	54% ▼
South Australia	58% ▼
Australia	60% ▼

Public transport (to work)

0% ◂▸(-0.1%)

Regional SA	1% ◂▸
South Australia	7% ◂▸
Australia	11% ▲

Limestone Coast region

About the profile areas

Location and boundaries

The Limestone Coast Region is located in the far south-east of South Australia, between 200 and 450 kilometres south-east of the Adelaide CBD, and between 400 and 500 kilometres west of the Melbourne CBD. The Limestone Coast Region is bounded by the Coorong District Council area and the Southern Mallee District Council area in the north, the Victorian border, West Wimmera Shire and Glenelg Shire in the east, and the Southern Ocean in the south and west.

Important
Statistics

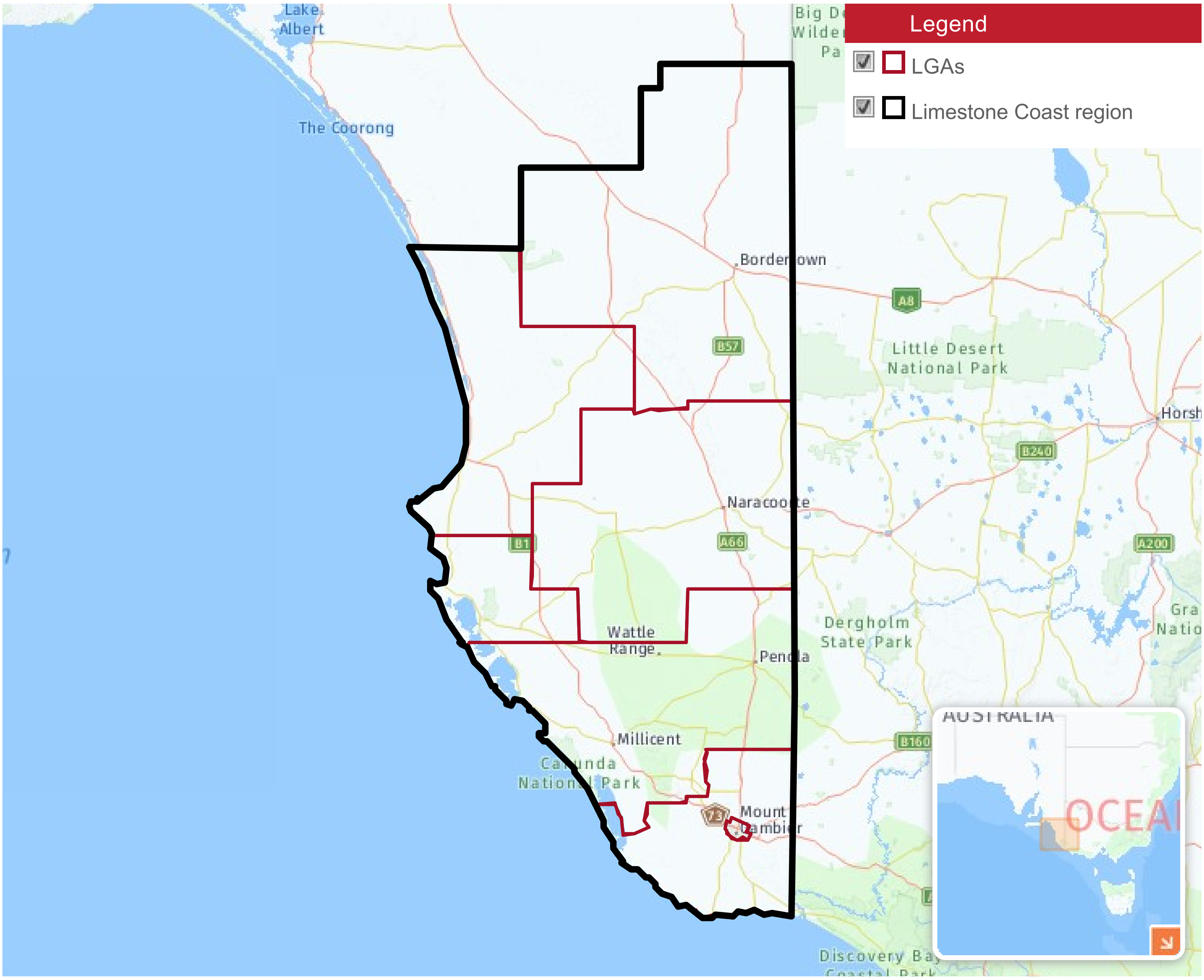
Population
66,683
2016 ABS ERP

Land area
2,132,934
ha (21,329 Km^2)

Population density
0.03
persons per hectare

Profile areas

Limestone Coast region



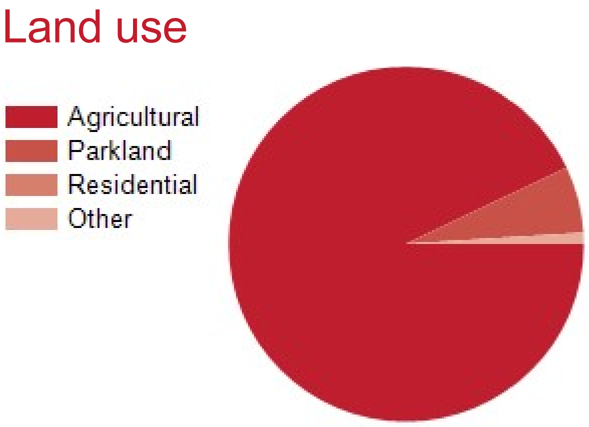
Compiled and presented in profile.id by .id, the population experts.

Settlement history

European settlement dates from the 1840s, with land used mainly for sheep and cattle grazing, with some timber milling. Several townships were established in the 1850s, including Bordertown, Kingston SE, Mount Gambier and Penola. Growth took place from the 1850s into the 1870s, following the establishment of ports at Kingston SE, Port MacDonell and Robe. Growth continued in most areas during the late 1800s, aided by the opening of the railway line. Significant development occurred from the post-war years, aided by the soldier settlement scheme and tourism. The population of the Region was relatively stable during the 1990s at about 60,000 people, and then increased gradually to nearly 62,000 in 2011. Most of the recent growth has been in the south, in the City of Mount Gambier.

Land use

The Limestone Coast Region is predominantly rural, with the main city being Mount Gambier, and regional centres at Beachport, Bordertown, Keith, Kingston SE, Millicent, Naracoorte, Penola and Robe. More than one third of the population live in the City of Mount Gambier. Smaller townships include Coonawarra, Furner, Glencoe, Hatherleigh, Kalangadoo, Lucindale, Mount Burr, Nangwarry, Port MacDonnell, Rendelsham, Southend, Tantanoola and Tarpeena, with numerous small villages and coastal communities. The Limestone Coast Region encompasses a total land area of more than 21,000 square kilometres. Rural land is used largely for agriculture (particularly sheep and cattle grazing and grain growing), with some horticulture, viticulture, timber production and aquaculture (fishing and lobsters). Tourism is also an important industry.



Transport

The Limestone Coast Region is served by the Dukes Highway, the Jubilee Highway, the Ngarkat Highway, the Princes Highway, the Riddoch Highway and the Southern Ports Highway.

Major features

Major features of the Region include Canunda National Park, Coorong National Park, Naracoorte Caves National Park, Lower South East Marine Park, Picaninnie Ponds Karst Wetlands, numerous Conservation Parks (Aberdour, Bangham, Beachport, Belt Hill, Bernouilli, Big Heath, Butcher Gap, Calectasia, Carpenter Rocks, Desert Camp, Dingley Dell, Douglas Point, Ewens Ponds, Fairview, Finger Point, Glen Roy, Gower, Guichen Bay, Gum Lagoon, Hacks Lagoon, Hardings Springs, Jip, Lake Frome, Little Dip, Lower Glenelg River, Mount Munster, Mount Scott, Mount Shaugh, Mullinger Swamp, Nene Valley, Ngarkat, Padthaway, Penambol, Penguin Island, Penola, Picaninnie Ponds, Pine Hill, Reedy Creek, Talapar, Tantanoola Caves, Telford Scrub, Tilley Swamp, Woakwine and Wolseley Common), various lakes (including Blue, Bonney, Brownes, Butler, Charm, Edward, Eliza, Fellmongery, George, Leake, McIntyre, Robe, St Clair and Valley), Englebrecht Cave, Tantanoola Cave, several Game Reserves (Bool Lagoon, Bucks Lake, Lake Robe and Poocher Swamp), Cave Gardens (State Heritage Area), Umpherston Sinkhole, Penguin Viewing Platform, The Lady Nelson Visitor & Discovery Centre, Woolwash Interpretive Centre, Robe Sealife Centre, Teatrick Lavender Estate, various golf clubs (Beachport, Blue Lake Public, Bordertown, Hatherleigh, Keith, Kingston SE, Lucindale Country Club, Millicent, Mount Gambier, Naracoorte, Padthaway, Port MacDonnell and Robe), Mount Gambier Aquatic Centre, Bordertown Wildlife Park, Valley Lake Wildlife Park, Cape Northumberland Heritage and Nature Park, Lake Bonney Wind Farms, Woakwine Wind Farm, numerous museums (Beachport Old Wool and Grain Store, Bourne's Bird, Clayton Farm Heritage, Kingston National Trust, Lucindale, Millicent Living History, Mount Gambier Courthouse, Nangwarry Forest, Port MacDonnell & District Maritime and The Sheep's Back), Mary McKillop Penola Centre, Glencoe Woolshed, various art galleries, numerous wineries, TAFE SA (Bordertown, Mount Gambier and Naracoorte Campuses), University of South Australia (Mount Gambier Campus), various hospitals (Bordertown Memorial, Keith & District, Kingston Soldiers Memorial, Millicent and District, Mount Gambier & Districts Health Service, Naracoorte Health Service and Penola War Memorial), numerous beaches and several small airports (Kingston, Mount Gambier, Naracoorte and Robe).

Indigenous background

The original inhabitants of the Limestone Coast Region were the Booandik, Cannawigra, Meintangk, Ngarrindjeri, Tatiara and Wirrega Aboriginal people.

Included areas

The Limestone Coast Region encompasses seven local government areas: the District Council of Grant, the Kingston District Council area, the City of Mount Gambier, the Naracoorte-Lucindale Council area, the District Council of Robe, the Tatiara District Council area, and the Wattle Range Council area.

Limestone Coast region

Population and dwellings

There are a number of different ways of measuring the population of an area, all of which give an insight into the size of the place and its rate of growth over different time periods. The Census counts people where they are on the night of the Census (enumerated population) and also by where they usually live (usual residence). Both these populations are useful and form the basis for a range of characteristics collected in the Census.

However, the most accurate count of the total population is Estimated Resident Population, which factors in an estimate of those missed in the Census and those who were overseas on Census night. It is usually higher than either Census count, and is also updated annually after the Census, providing preliminary estimates for up to 5 years.

This page provides the three population counts for the Limestone Coast region at the last Census, with comparisons to previous Census years for the Census counts only. The current estimate for the Limestone Coast region at the most recent year available is shown at the top of the page. This figure is a preliminary estimate only and is subject to review after the next Census data are released. Please use with caution.

Also included are a range of sub-population groups and key statistics from the Census (usual resident) population, such as citizens, employed persons and Indigenous population.

These figures all provide the context for the size of the population and growth rate within the Limestone Coast region and should be looked at in conjunction with other basic demographic information, such as Age Structure, Dwelling Type and Household Size.

The data on this page are sourced from a variety of different tables and designed to give a range of population and dwelling numbers for the area.

Population

Limestone Coast region - Total persons	NEW 2016			2011			Change
Population	Number	%	Regional SA%	Number	%	Regional SA%	2011 to 2016
Estimated Resident Population	66,683	--	--	64,375	--	--	+2,308
Enumerated Population	63,243	--	--	61,732	--	--	+1,511
Usual Resident Population	64,794	--	--	63,078	--	--	+1,716

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented in profile.id by .id , the population experts.

Please refer to specific data notes for more information

Selected subpopulation categories

Limestone Coast region - Total people (Usual residence)	NEW 2016			2011			Change
Population group	**Number**	**%**	**Regional SA%**	**Number**	**%**	**Regional SA%**	**2011 to 2016**
Males	32,845	50.7	50.4	31,642	50.2	50.4	+1,203
Females	31,942	49.3	49.6	31,436	49.8	49.6	+506
Aboriginal and Torres Strait Islander population	1,210	1.9	4.1	1,085	1.7	4.0	+125
Australian citizens	57,656	89.0	88.9	57,851	91.7	90.7	-195
Eligible voters (citizens aged 18+)	44,053	68.0	69.2	43,588	69.1	69.5	+465
Population over 15	52,495	81.0	82.3	50,269	79.7	81.0	+2,226
Employed Population	29,911	94.8	93.4	30,191	94.7	94.6	-280
Overseas visitors (enumerated)	355	--	--	253	--	--	+102

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016 (Usual residence). Compiled and presented in profile.id by .id , the population experts.

Please refer to specific data notes for more information

Dwellings

Limestone Coast region - Households (Enumerated)	NEW 2016			2011			Change
Dwellings	**Number**	**%**	**Regional SA%**	**Number**	**%**	**Regional SA%**	**2011 to 2016**
Total dwellings	31,908	100.0	100.0	31,074	100.0	100.0	+834
Occupied private dwellings	26,156	82.0	77.7	25,444	81.9	78.1	+712
Population in non-private dwellings	2,150	--	--	1,779	--	--	+371
Average household size (persons per dwelling)	*2.34*	--	*2.28*	*2.36*	--	*2.32*	*-0.03*

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016 (Enumerated). Compiled and presented in profile.id by .id , the population experts.

Please refer to specific data notes for more information

*Note that this is an estimate based on ERP at the SA1 level. It is subject to review after the next Census data release and may not match .id's population forecasts.

Limestone Coast region

Estimated Resident Population (ERP)

The Estimated Resident Population is the OFFICIAL RDA Limestone Coast Region population for 2016. For areas within the Limestone Coast region, the ERP is not an official count but an experimental estimate which is subject to review after the next Census.

Populations are counted and estimated in various ways. The most comprehensive population count available in Australia is derived from the Census of Population and Housing conducted by the Australian Bureau of Statistics every five years. However the Census count is generally an under-estimate of the actual population, due to people missed in the Census and people overseas on Census night. To provide a more accurate population figure which is updated more frequently than every five years, the Australian Bureau of Statistics also produces "Estimated Resident Population" (ERP) numbers for the Limestone Coast region. Estimates for areas within the Limestone Coast region are based on aggregates of SA1s derived from population distributions applicable at the 2011 Census. Actual populations may vary slightly where population growth has not been uniform since the previous Census.

See data notes for a detailed explanation of different population types, how they are calculated and when to use each one.

Estimated Resident Population (ERP)

Limestone Coast region			
Year (ending June 30)	**Number**	**Change in number**	**Change in percent**
2006	63,630	--	--
2007	63,886	+256	+0.40
2008	64,069	+183	+0.29
2009	64,224	+155	+0.24
2010	64,542	+318	+0.50
2011	64,375	-167	-0.26
2012	64,975	+600	+0.93
2013	65,475	+500	+0.77
2014	66,067	+592	+0.90
2015	66,472	+405	+0.61
2016	66,683	+211	+0.32

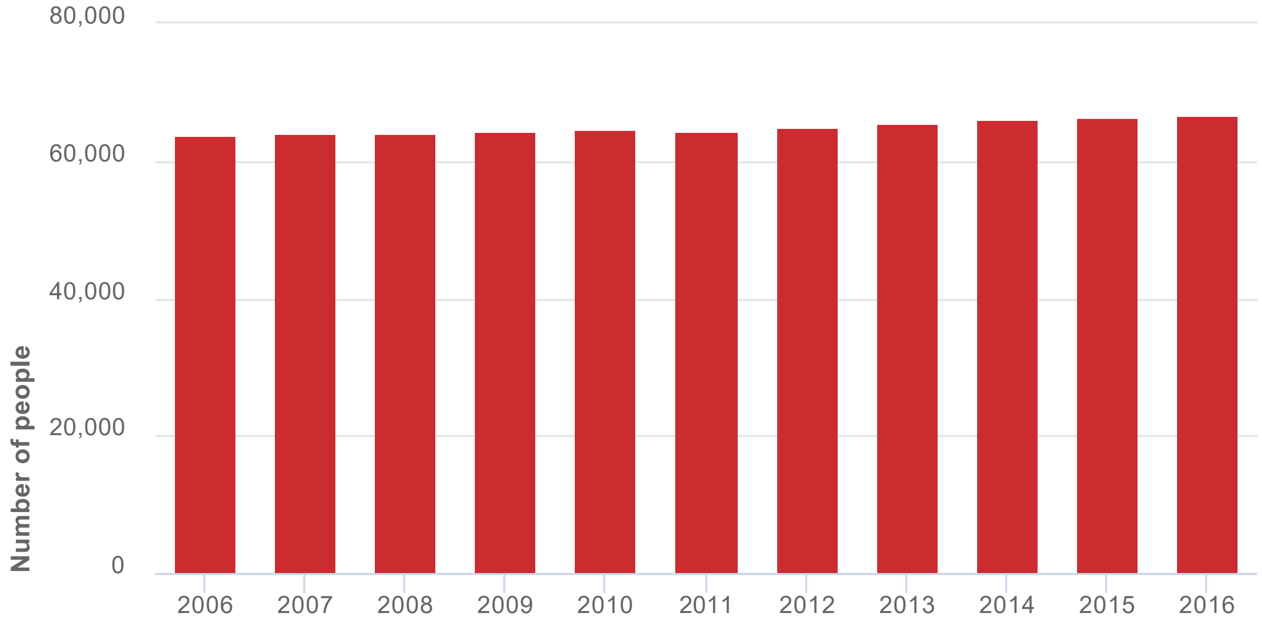
Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented in profile.id by .id , the population experts.

Please refer to specific data notes for more information

e ERP benchmarked to South Australia and Australia

Estimated Resident Population (ERP)

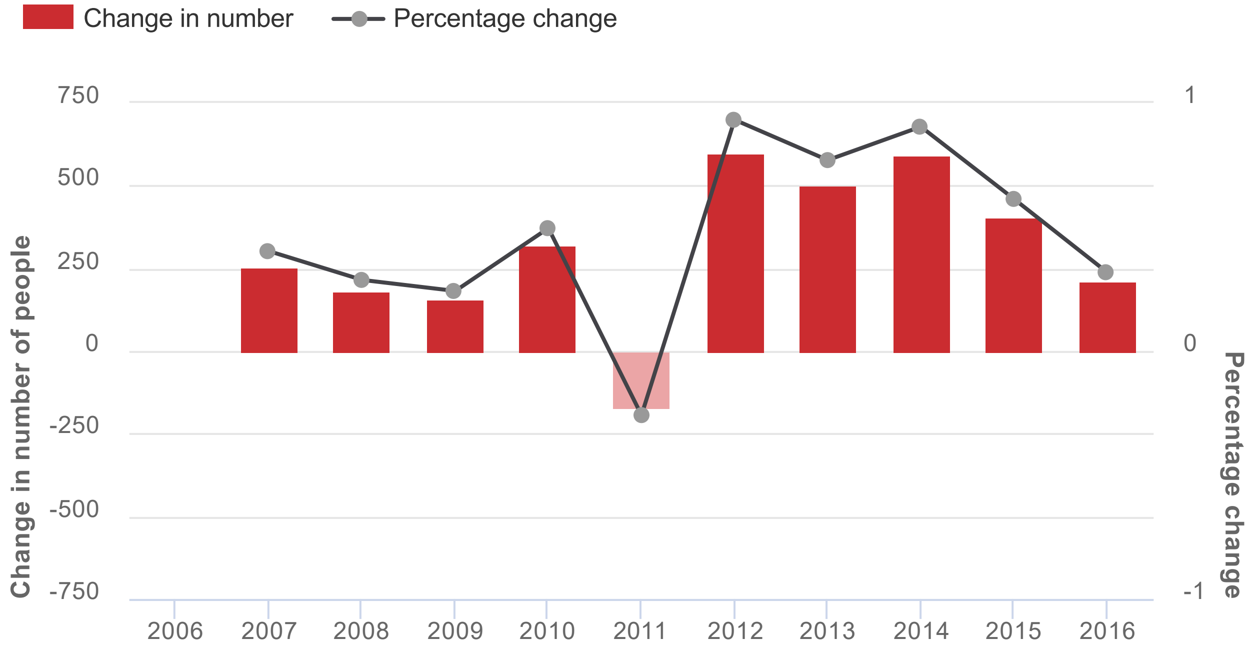
Limestone Coast region



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

Annual change in Estimated Resident Population (ERP)

Limestone Coast region



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

.id the population experts

Limestone Coast region

Service age groups

The Age Structure of the Limestone Coast region provides key insights into the level of demand for age based services and facilities such as child care. It is an indicator of the Limestone Coast region's residential role and function and how it is likely to change in the future.

Service age groups divide the population into age categories that reflect typical life-stages. They indicate the level of demand for services that target people at different stages in life and how that demand is changing.

To get a more complete picture the Limestone Coast region's Age Structure should be viewed in conjunction with Household Types and Dwelling Types.

Age structure - Service age groups

Limestone Coast region - Total persons (Usual residence)	NEW 2016			2011			Change
Service age group (years)	Number	%	Regional SA %	Number	%	Regional SA %	2011 to 2016
Babies and pre-schoolers (0 to 4)	3,778	5.8	5.5	4,191	6.6	6.1	-413
Primary schoolers (5 to 11)	6,015	9.3	8.6	5,987	9.5	8.9	+28
Secondary schoolers (12 to 17)	4,894	7.6	7.2	5,272	8.4	8.1	-378
Tertiary education and independence (18 to 24)	4,756	7.3	6.8	4,656	7.4	7.1	+100
Young workforce (25 to 34)	7,037	10.9	10.4	7,179	11.4	10.3	-142
Parents and homebuilders (35 to 49)	12,353	19.1	17.8	13,014	20.6	19.9	-661
Older workers and pre-retirees (50 to 59)	9,172	14.2	14.6	8,834	14.0	14.4	+338
Empty nesters and retirees (60 to 69)	8,434	13.0	14.4	6,992	11.1	12.8	+1,442
Seniors (70 to 84)	6,674	10.3	12.1	5,660	9.0	10.3	+1,014
Elderly aged (85 and over)	1,663	2.6	2.7	1,293	2.0	2.3	+370
Total	64,776	100.0	100.0	63,078	100.0	100.0	+1,698

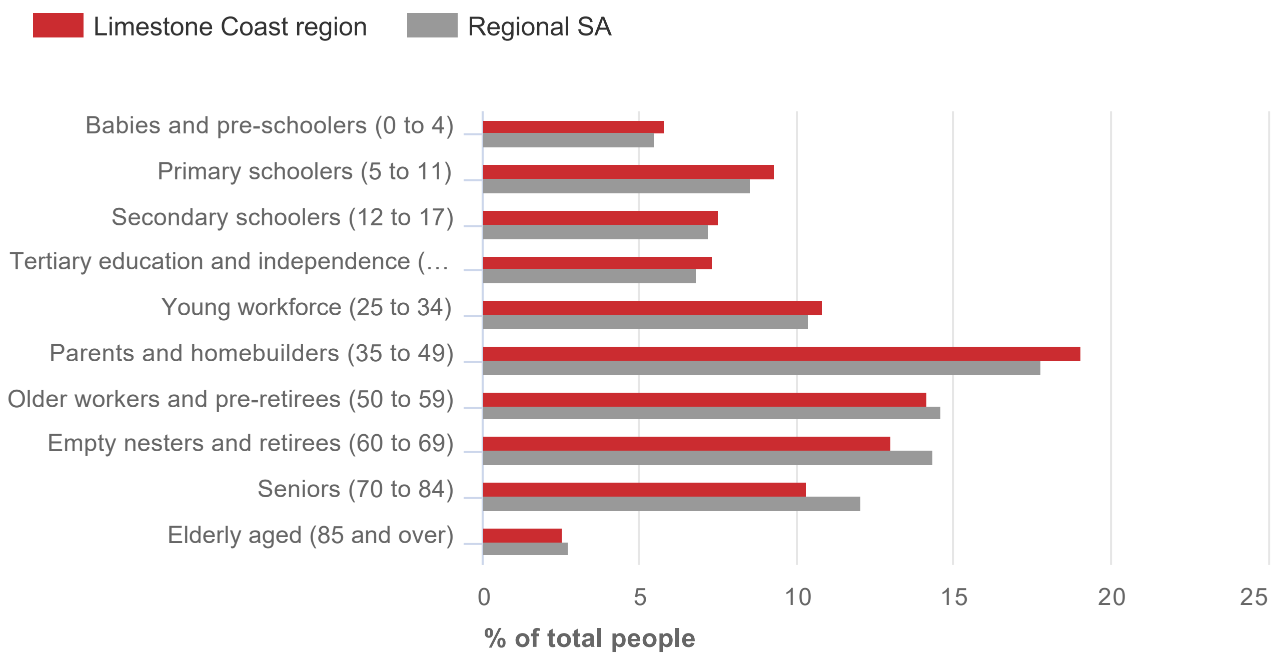
Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

.id the population experts

Age structure - service age groups, 2016

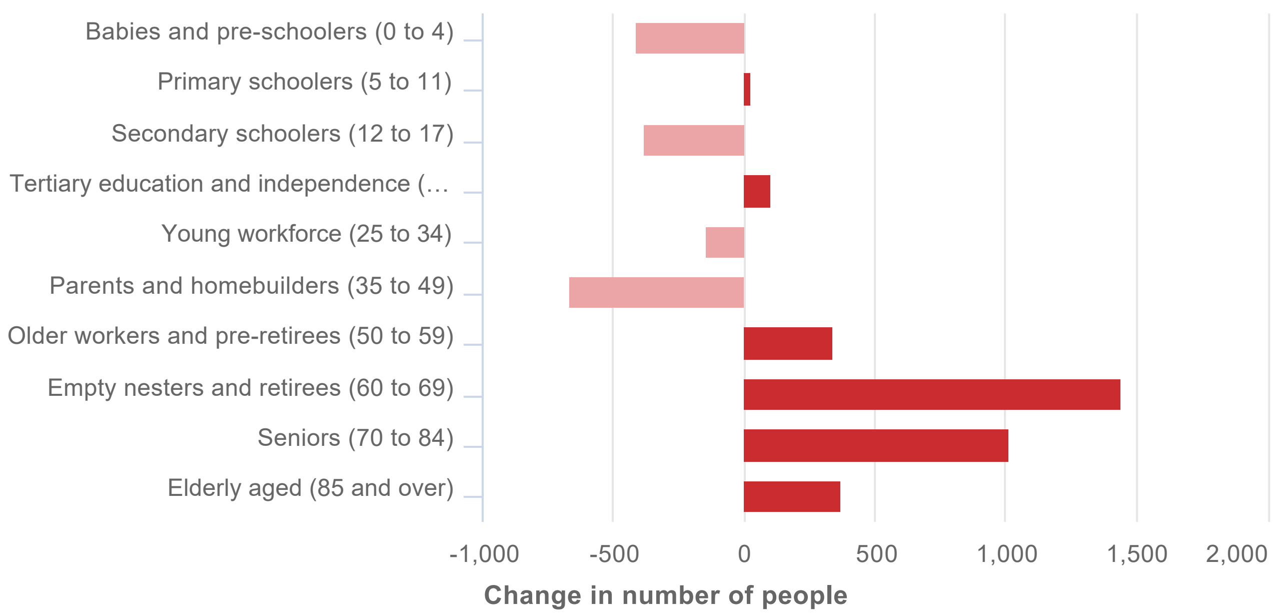
Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in age structure - service age groups, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the service age groups of the Limestone Coast region in 2016 compared to Regional SA shows that there was a higher proportion of people in the younger age groups (0 to 17 years) and a lower proportion of people in the older age groups (60+ years).

Overall, 22.7% of the population was aged between 0 and 17, and 25.9% were aged 60 years and over, compared with 21.3% and 29.2% respectively for Regional SA.

The major differences between the age structure of the Limestone Coast region and Regional SA were:

- A *larger* percentage of 'Parents and homebuilders (35 to 49)' (19.1% compared to 17.8%)
- A *smaller* percentage of 'Seniors (70 to 84)' (10.3% compared to 12.1%)
- A *smaller* percentage of 'Empty nesters and retirees (60 to 69)' (13.0% compared to 14.4%)

Emerging groups

From 2011 to 2016, Limestone Coast region's population increased by 1,698 people (2.7%). This represents an average annual population change of 0.53% per year over the period.

The largest changes in the age structure in this area between 2011 and 2016 were in the age groups:

- Empty nesters and retirees (60 to 69) (+1,442 people)
- Seniors (70 to 84) (+1,014 people)
- Parents and homebuilders (35 to 49) (-661 people)
- Babies and pre-schoolers (0 to 4) (-413 people)

Limestone Coast region

Five year age groups

The Age Structure of the Limestone Coast region provides key insights into the level of demand for age based services and facilities such as child care. It is also an indicator of the Limestone Coast region's residential role and function and how it is likely to change in the future.

Five year age groups present a classic age profile of the population. Each age group covers exactly five years, which enables direct comparison between each group.

To get a more complete picture the Limestone Coast region's Age Structure should be viewed in conjunction with Household Types and Dwelling Types.

Age structure - Five year age groups

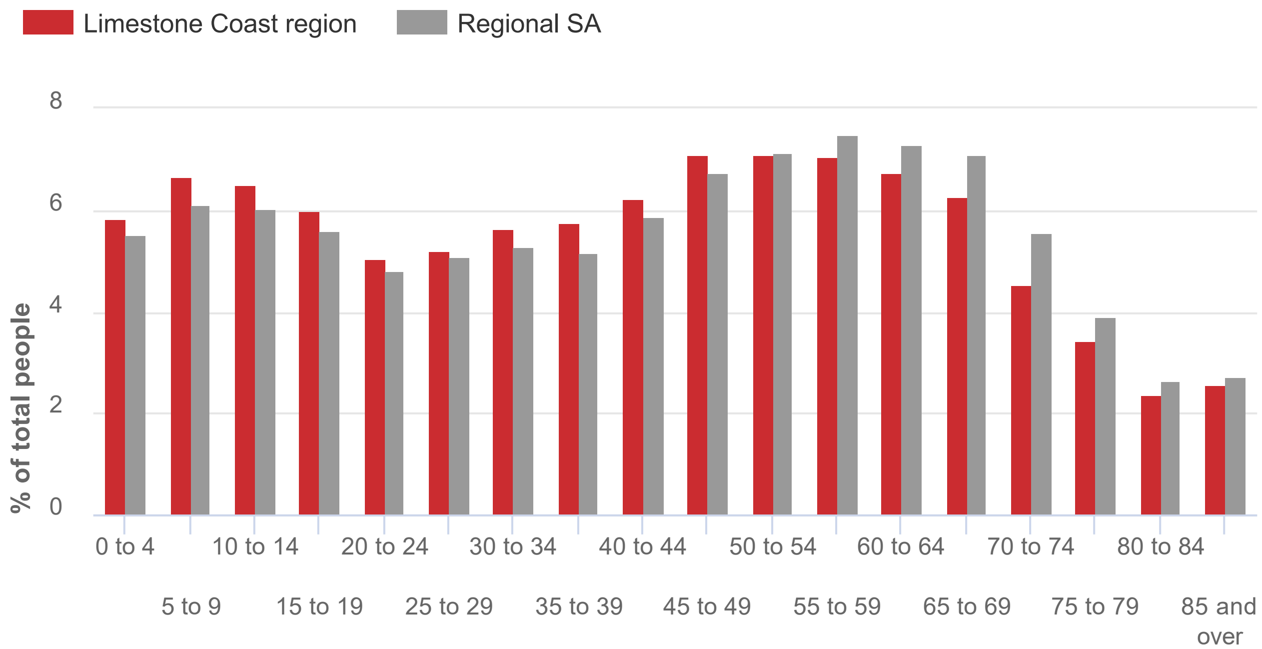
Limestone Coast region - Total persons (Usual residence)	NEW 2016			2011			Change
Five year age groups (years)	Number	%	Regional SA%	Number	%	Regional SA%	2011 to 2016
0 to 4	3,778	5.8	5.5	4,191	6.6	6.1	-413
5 to 9	4,323	6.7	6.1	4,252	6.7	6.2	+71
10 to 14	4,206	6.5	6.0	4,411	7.0	6.7	-205
15 to 19	3,873	6.0	5.6	4,098	6.5	6.2	-225
20 to 24	3,277	5.1	4.8	3,154	5.0	4.9	+123
25 to 29	3,381	5.2	5.1	3,530	5.6	5.1	-149
30 to 34	3,662	5.7	5.3	3,649	5.8	5.1	+13
35 to 39	3,720	5.7	5.2	3,848	6.1	5.9	-128
40 to 44	4,031	6.2	5.9	4,624	7.3	6.9	-593
45 to 49	4,597	7.1	6.7	4,542	7.2	7.1	+55
50 to 54	4,606	7.1	7.1	4,560	7.2	7.4	+46
55 to 59	4,568	7.1	7.5	4,274	6.8	7.0	+294
60 to 64	4,378	6.8	7.3	4,015	6.4	7.0	+363
65 to 69	4,053	6.3	7.1	2,977	4.7	5.7	+1,076
70 to 74	2,928	4.5	5.5	2,380	3.8	4.4	+548
75 to 79	2,217	3.4	3.9	1,797	2.8	3.3	+420
80 to 84	1,529	2.4	2.6	1,483	2.4	2.6	+46
85 and over	1,663	2.6	2.7	1,293	2.0	2.3	+370
Total population	64,790	100.0	100.0	63,078	100.0	100.0	+1,712

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

Age structure - five year age groups, 2016

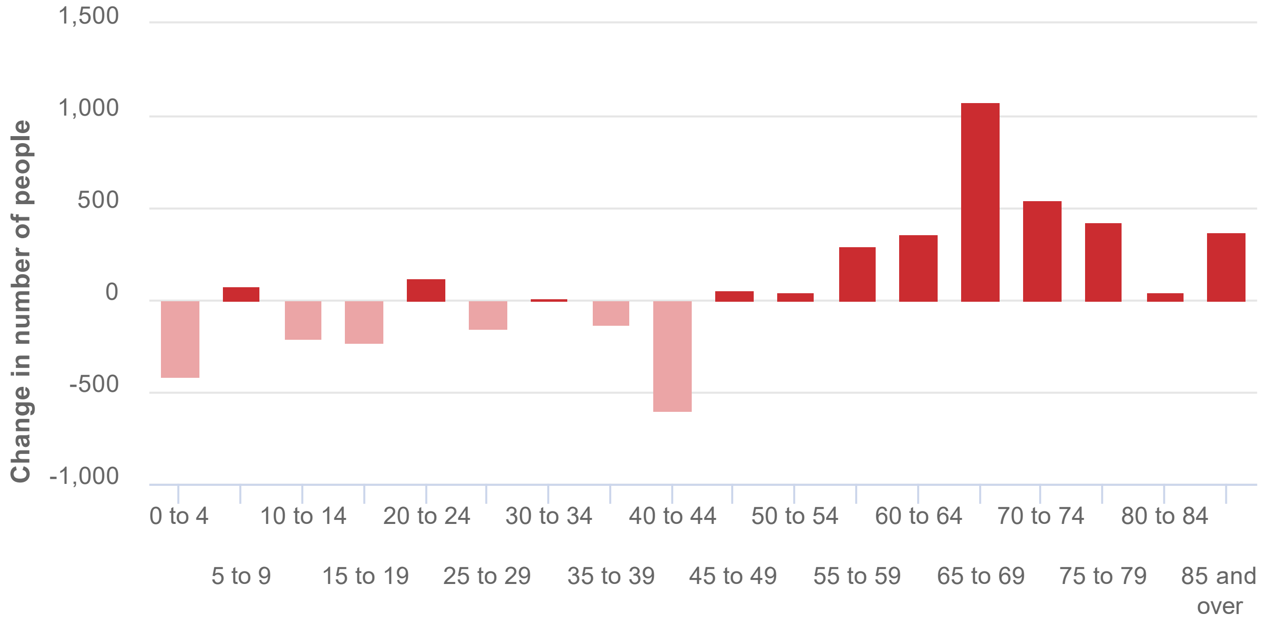
Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in age structure - five year age groups, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the five year age groups of the Limestone Coast region in 2016 compared to Regional SA shows that there was a higher proportion of people in the younger age groups (under 15) and a lower proportion of people in the older age groups (65+).

Overall, 19.0% of the population was aged between 0 and 15, and 19.1% were aged 65 years and over, compared with 17.7% and 21.9% respectively for Regional SA.

The major differences between the age structure of the Limestone Coast region and Regional SA were:

- A *larger* percentage of persons aged 35 to 39 (5.7% compared to 5.2%)
- A *larger* percentage of persons aged 5 to 9 (6.7% compared to 6.1%)
- A *smaller* percentage of persons aged 70 to 74 (4.5% compared to 5.5%)
- A *smaller* percentage of persons aged 65 to 69 (6.3% compared to 7.1%)

Emerging groups

From 2011 to 2016, Limestone Coast region's population increased by 1,712 people (2.7%). This represents an average annual population change of 0.54% per year over the period.

The largest changes in age structure in this area between 2011 and 2016 were in the age groups:

- 65 to 69 (+1,076 persons)
- 40 to 44 (-593 persons)
- 70 to 74 (+548 persons)
- 75 to 79 (+420 persons)

Limestone Coast region

Overseas arrivals

The Year of Arrival data records when the overseas born population arrived in Australia. The data shows the degree to which areas are 'ports' for new overseas arrivals and reveals the role of the Limestone Coast region in housing the overseas-born.Â The number of recent overseas arrivals in an area is often determined by housing affordability, employment opportunities and pre-existing communities located in the area.

the Limestone Coast region's Year of Arrival data, when used with Birthplace, Religion and Language Spoken at Home data, is a good indicator of the likely need for services in migrant communities.

Overseas arrivals

Limestone Coast region - Overseas born (Usual residence)	NEW 2016		
Year of arrival in Australia	Number	%	Regional SA %
2011 to 9 Aug 2016	1,327	20.6	12.4
2006 to 2010	878	13.6	9.9
2001 to 2005	324	5.0	4.2
1991 to 2000 (10 year period)	389	6.0	5.1
1981 to 1990 (10 year period)	416	6.4	7.1
1971 to 1980 (10 year period)	545	8.4	12.6
1961 to 1970 (10 year period)	1,070	16.6	26.5
Arrived in 1960 or earlier	1,119	17.3	17.3
Not stated	382	5.9	5.0
Total	6,450	100.0	100.0

Source: Australian Bureau of Statistics, Census of Population and Housing 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

Overseas arrivals, 2016

Total persons

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the year of arrival for the overseas born population of the Limestone Coast region in 2016 compared to Regional SA shows that there was a smaller proportion of people who arrived before 2001, and a larger proportion of recent overseas arrivals (those who arrived between 2011 to 9 Aug 2016).

Overall, 54.9% of the overseas born population arrived before 2001, and 21% arrived during or after 2011, compared with 68.5% and 12.4% respectively for Regional SA.

The major differences in year of arrival data in the population between the Limestone Coast region and Regional SA are:

- A *larger* percentage of arrivals between 2011 to 9 Aug 2016 (20.6% compared to 12.4%)
- A *larger* percentage of arrivals between 2006 to 2010 (13.6% compared to 9.9%)
- A *smaller* percentage of arrivals between 1961 to 1970 (10 year period) (16.6% compared to 26.5%)
- A *smaller* percentage of arrivals between 1971 to 1980 (10 year period) (8.4% compared to 12.6%)

Limestone Coast region

Qualifications

Educational Qualifications relate to education outside of primary and secondary school and are one of the most important indicators of socio-economic status. With other data sources, such as Employment Status, Income and Occupation, the Limestone Coast region's Educational Qualifications help to evaluate the economic opportunities and socio-economic status of the area and identify skill gaps in the labour market.

Highest qualification achieved

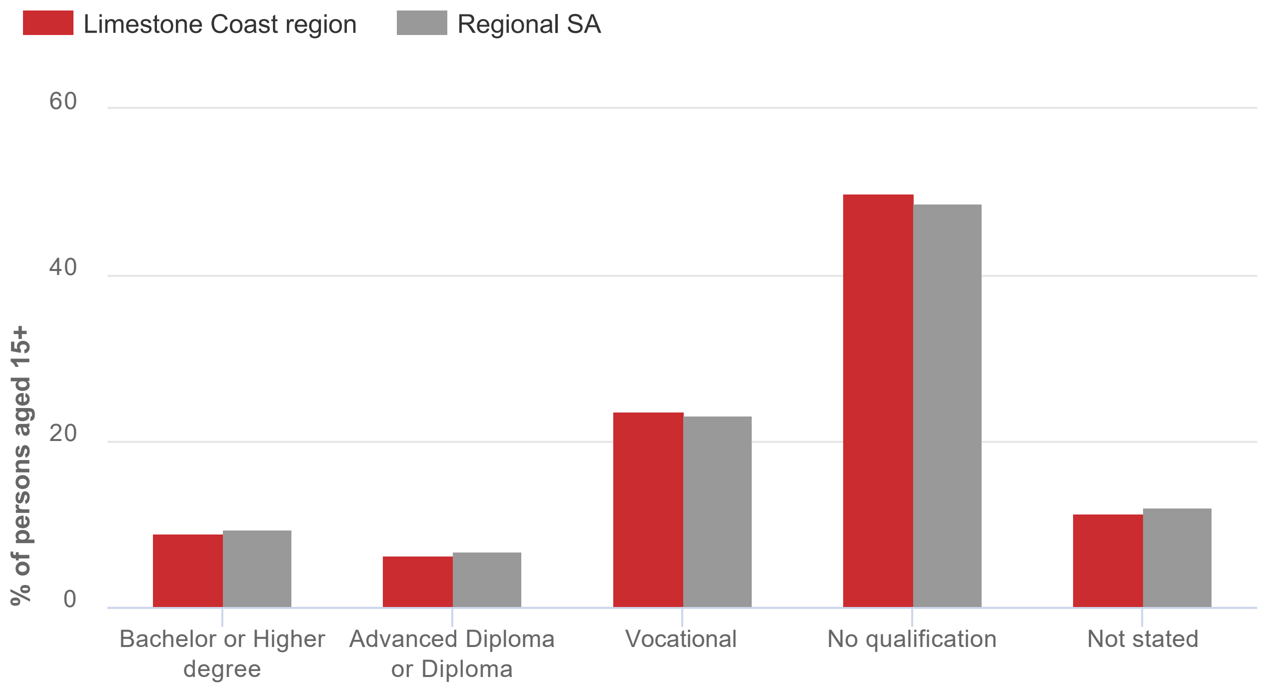
Limestone Coast region - Persons aged 15+ (Usual residence)	NEW 2016			2011			Change
Qualification level	**Number**	**%**	**Regional SA %**	**Number**	**%**	**Regional SA %**	**2011 to 2016**
Bachelor or Higher degree	4,729	9.0	9.3	4,073	8.1	8.2	+656
Advanced Diploma or Diploma	3,311	6.3	6.8	2,665	5.3	5.7	+646
Vocational	12,378	23.6	23.0	10,759	21.4	20.9	+1,619
No qualification	26,127	49.8	48.7	27,957	55.6	54.1	-1,830
Not stated	5,935	11.3	12.1	4,809	9.6	11.0	+1,126
Total persons aged 15+	52,480	100.0	100.0	50,263	100.0	100.0	+2,217

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

- e Workforce qualifications by industry
- e Workforce field of qualifications by industry
- e Local labour force qualifications by industry
- e Local labour force field of qualifications by industry

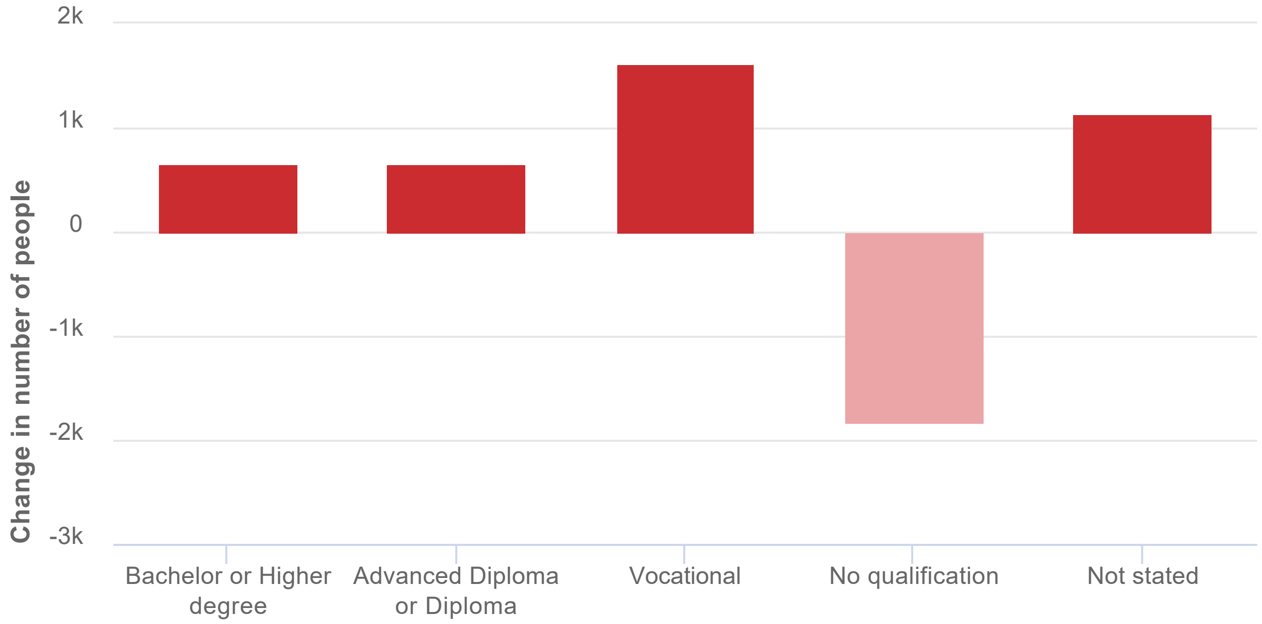
Highest qualification achieved, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in highest qualification achieved, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the qualifications of the population in the Limestone Coast region in 2016 compared to Regional SA shows that there was a similar proportion of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or Vocational qualifications), and a higher proportion of people with no formal qualifications.

Overall, 38.9% of the population aged 15 and over held educational qualifications, and 49.8% had no qualifications, compared with 39.2% and 48.7341% respectively for Regional SA.

The major difference between the qualifications held by the population of the Limestone Coast region and Regional SA is:

- A *larger* percentage of persons with No qualifications (49.8% compared to 48.7%)

Emerging groups

The largest changes in the qualifications of the population in the Limestone Coast region between 2011 and 2016 were in those with:

- No qualifications (-1,830 persons)
- Vocationals (+1,619 persons)
- Bachelor or Higher degrees (+656 persons)
- Advanced Diploma or Diplomas (+646 persons)

Limestone Coast region

Highest level of schooling

the Limestone Coast region's school completion data is a useful indicator of socio-economic status. With other indicators, such as Proficiency in English, the data informs planners and decision-makers about people's ability to access services. Combined with Educational Qualifications it also allows assessment of the skill base of the population.

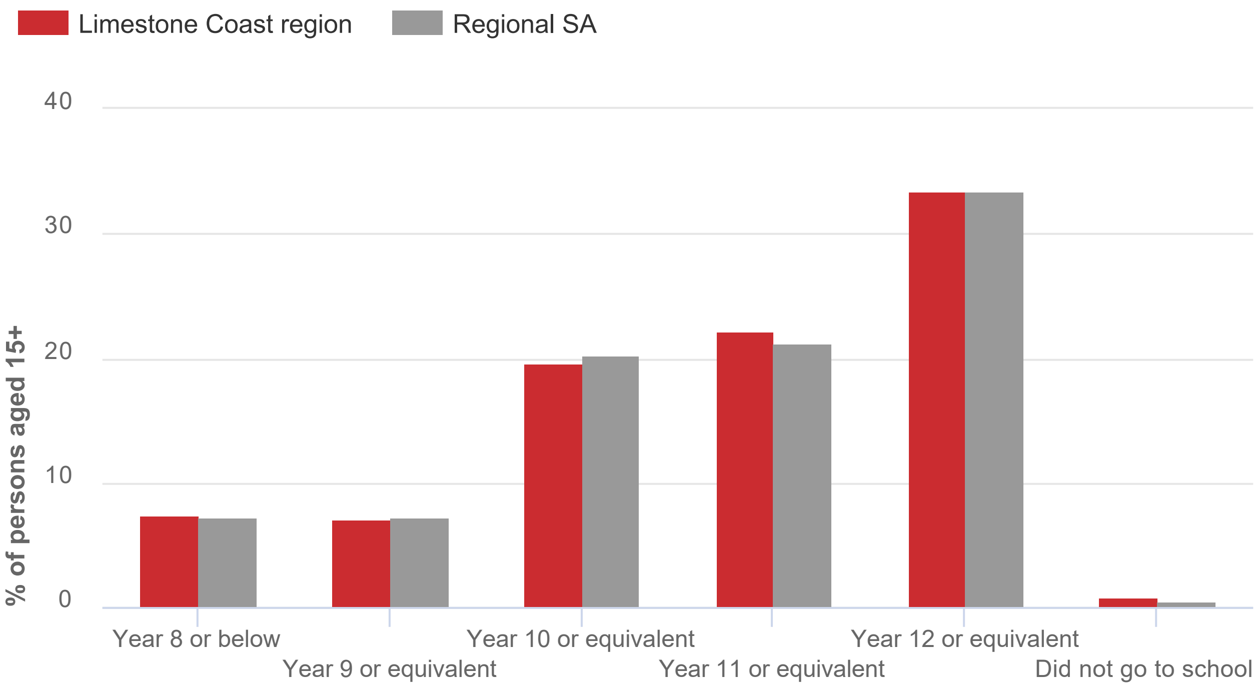
Highest level of secondary schooling completed

Limestone Coast region - Total persons (Usual residence)	NEW 2016			2011			Change
Level of schooling	**Number**	**%**	**Regional SA %**	**Number**	**%**	**Regional SA %**	**2011 to 2016**
Year 8 or below	3,842	7.3	7.2	4,379	8.7	9.1	-537
Year 9 or equivalent	3,743	7.1	7.2	4,010	8.0	8.2	-267
Year 10 or equivalent	10,320	19.7	20.2	10,671	21.2	21.6	-351
Year 11 or equivalent	11,610	22.1	21.3	11,689	23.3	21.8	-79
Year 12 or equivalent	17,576	33.5	33.4	15,602	31.0	30.3	+1,974
Did not go to school	386	0.7	0.4	268	0.5	0.5	+118
Not stated	5,024	9.6	10.2	3,644	7.2	8.5	+1,380
Total persons aged 15+	52,501	100.0	100.0	50,263	100.0	100.0	+2,238

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

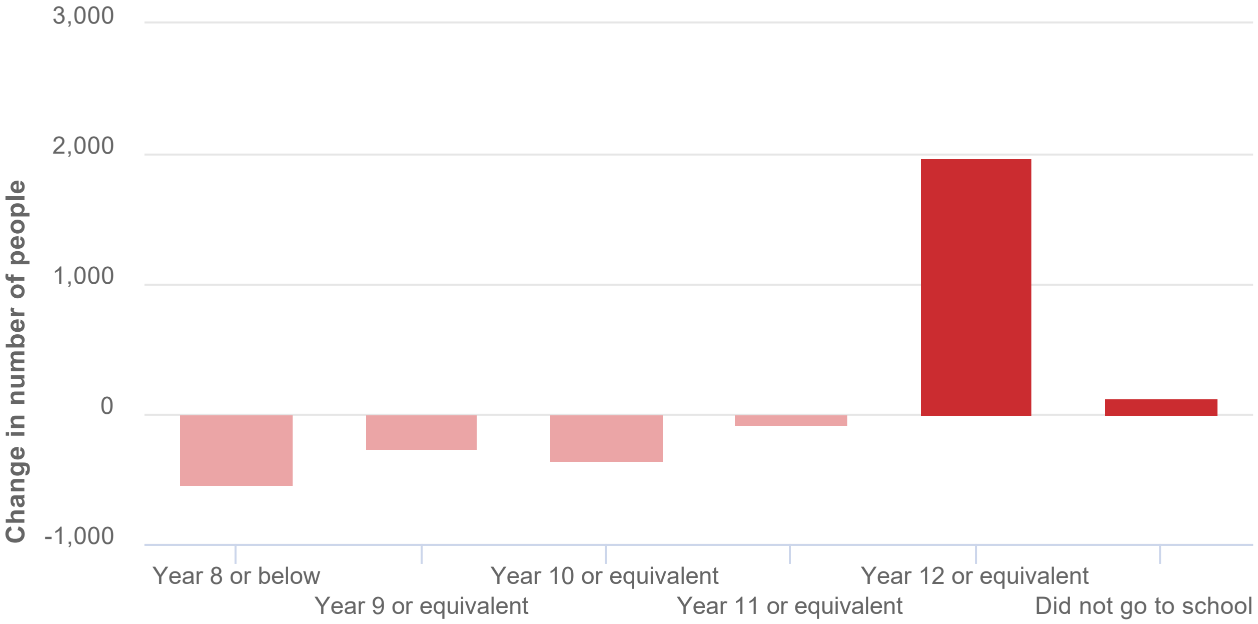
Highest level of schooling completed, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in highest level of schooling completed, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the highest level of schooling attained by the population in the Limestone Coast region in 2016 compared to Regional SA shows that there was a similar proportion of people who had left school at an early level (Year 10 or less) as well as a similar proportion of people who completed Year 12 or equivalent.

Overall, 34.8% of the population left school at Year 10 or below, and 33.5% went on to complete Year 12 or equivalent, compared with 35.1% and 33.4% respectively for Regional SA.

There were no major differences between Limestone Coast region and Regional SA in 2016.

Emerging groups

The largest changes in the level of schooling attained by the population in the Limestone Coast region, between 2011 and 2016 were:

- Year 12 or equivalent (+1,974 persons)
- Year 8 or below (-537 persons)
- Year 10 or equivalent (-351 persons)
- Year 9 or equivalent (-267 persons)

Limestone Coast region

Education institution attending

The share of the Limestone Coast region's population attending educational institutions reflects the age structure of the population, as it is influenced by the number of children attending school; proximity to tertiary education, which can mean young adults leaving home to be nearer to educational facilities and; the degree to which people are seeking out educational opportunities in adulthood, especially in their late teens and early twenties.

This data is often combined with Age Structure to identify areas with significant university student populations.

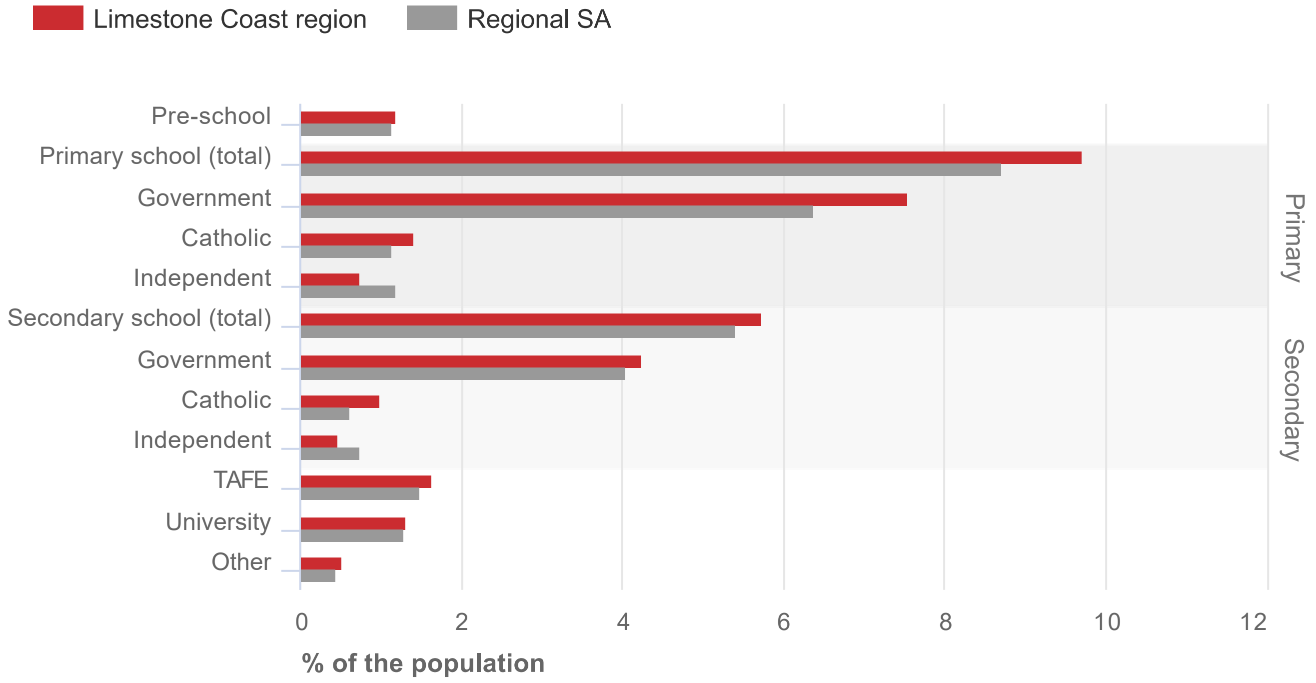
Education institution attending

Limestone Coast region - Total persons (Usual residence)	NEW 2016			2011			Change
Type of institution	**Number**	**%**	**Regional SA%**	**Number**	**%**	**Regional SA%**	**2011 to 2016**
Pre-school	778	1.2	1.1	942	1.5	1.3	-164
Primary school	6,297	9.7	8.7	6,332	10.0	9.2	-35
Primary - Government	4,895	7.6	6.4	5,018	8.0	6.7	-123
Primary - Catholic	915	1.4	1.1	821	1.3	1.2	+94
Primary - Independent	487	0.8	1.2	493	0.8	1.2	-6
Secondary school	3,714	5.7	5.4	3,831	6.1	5.7	-117
Secondary - Government	2,761	4.3	4.0	2,958	4.7	4.3	-197
Secondary - Catholic	642	1.0	0.6	601	1.0	0.7	+41
Secondary - Independent	311	0.5	0.7	272	0.4	0.8	+39
TAFE	1,065	1.6	1.5	1,397	2.2	1.9	-332
University	858	1.3	1.3	784	1.2	1.1	+74
Other	337	0.5	0.5	284	0.5	0.5	+53
Not attending	46,606	71.9	73.1	45,874	72.7	73.4	+732
Not stated	5,154	8.0	8.4	3,633	5.8	6.9	+1,521
Total	64,809	100.0	100.0	63,077	100.0	100.0	+1,732

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

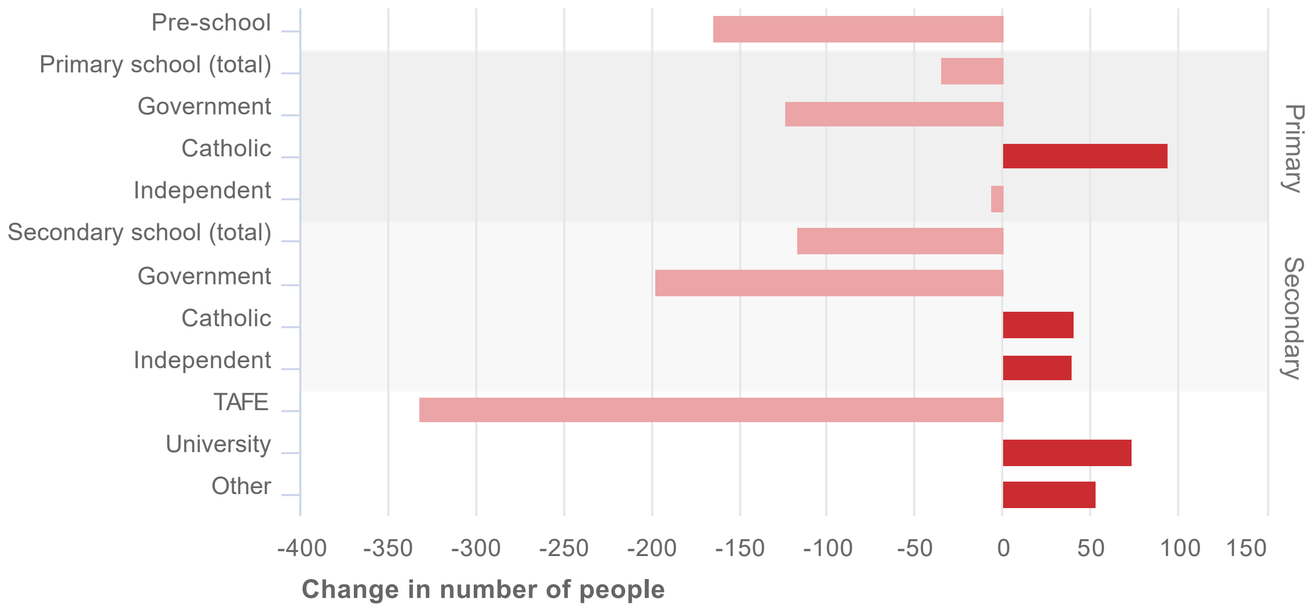
Education institution attending, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in education institution attending, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the share of the population attending educational institutions in the Limestone Coast region in 2016 compared to Regional SA shows that there was a higher proportion attending primary school, a similar proportion attending secondary school, and a similar proportion engaged in tertiary level education.

Overall, 9.7% of the population were attending primary school, 5.7% of the population were attending secondary institutions, and 3.0% were learning at a tertiary level, compared with 8.7%, 5.4% and 2.8% respectively for Regional SA.

The major differences between the share of the population attending learning institutions in the Limestone Coast region and Regional SA were:

- A *larger* percentage of persons Primary - Government (7.6% compared to 6.4%)
- A *larger* percentage of persons Primary school (9.7% compared to 8.7%)
- A *smaller* percentage of persons Not attending (71.9% compared to 73.1%)

Emerging groups

From 2011 to 2016, Limestone Coast region's population increased by 1,732 people (+2.7%). This represents an average annual change of 0.54% per year over the period.

The largest changes in the number of persons attending education institutions in the Limestone Coast region, between 2011 and 2016 were in those who nominated:

- TAFE (-332 persons)
- Secondary - Government (-197 persons)
- Pre-school (-164 persons)
- Primary - Government (-123 persons)

Limestone Coast region

Need for assistance

the Limestone Coast region's disability statistics relate directly to need for assistance due to a severe or profound disability. The information may be used in the planning of local facilities, services such as day-care and occasional care and in the provision of information and support to carers. the Limestone Coast region's disability statistics help in understanding the prevalence of people who need support in the community, and along with information on Unpaid Care to a person with a disability, how that support is provided.

Please note: A person's reported need for assistance is based on a subjective assessment and should therefore be treated with caution. See the specific data notes *for further detail.*

Due to changes in ABS rules concerning perturbation and additivity of data to protect the confidentiality of individuals in 2016, counts of individual age groups with a need for assistance in 2016 may not add up to the table total. The table total is independently calculated and will be closer to the true population requiring assistance. Due to ABS adjustments of small numbers, no reliability can be placed on small data cells in 2016. For more information please see the data notes on Data Confidentiality.

Need for assistance with core activities

Limestone Coast region - Persons (Usual residence)	NEW 2016			2011			Change
Assistance needed by age group (years)	**Number**	**% of total age group**	**Regional SA%**	**Number**	**% of total age group**	**Regional SA%**	**2011 to 2016**
0 to 4	53	1.4	1.3	55	1.3	1.1	-2
5 to 9	160	3.7	3.9	119	2.8	3.0	+41
10 to 19	242	3.0	3.6	213	2.5	2.7	+29
20 to 59	1,015	3.2	3.7	892	2.8	3.3	+123
60 to 64	238	5.4	6.5	234	5.8	7.3	+4
65 to 69	292	7.2	8.0	189	6.4	7.4	+103
70 to 74	237	8.1	9.2	177	7.4	8.9	+60
75 to 79	259	11.8	13.0	223	12.4	13.8	+36
80 to 84	314	20.3	21.4	337	22.5	23.9	-23
85 and over	617	37.8	41.7	630	48.4	47.5	-13
Total persons needing assistance	3,440	5.3	6.2	3,069	4.9	5.7	+371

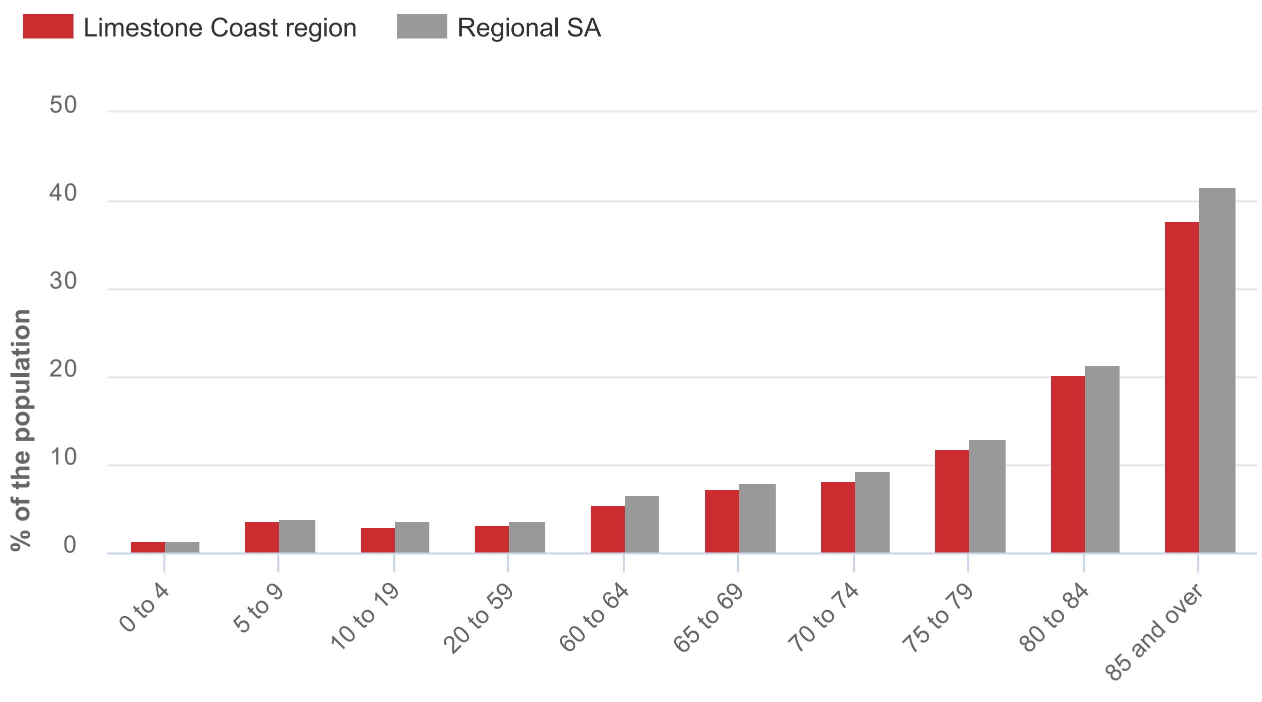
Need for assistance with core activities

Limestone Coast region - Total persons (Usual residence)	NEW 2016			2011			Change
Assistance needed by age group (years)	**Number**	**%**	**Regional SA%**	**Number**	**%**	**Regional SA%**	**2011 to 2016**
Total persons needing assistance	3,440	5.3	6.2	3,069	4.9	5.7	+371
Total persons not needing assistance	56,484	87.2	85.8	57,696	91.5	89.1	-1,212
Not stated	4,857	7.5	7.9	2,311	3.7	5.1	+2,546
Total Population	64,781	100.0	100.0	63,076	100.0	100.0	+1,705

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled and presented by .id , the population experts.

Please refer to specific data notes for more information

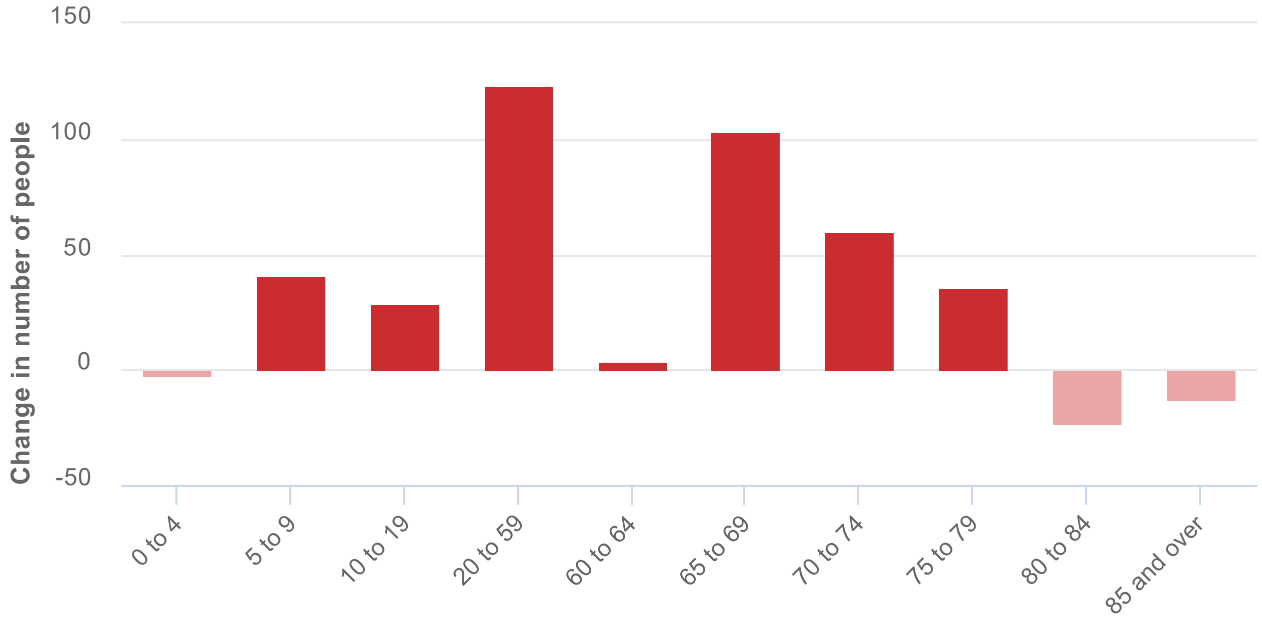
Need for assistance with core activities, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in need for assistance with core activities, 2011 to 2016

Limestone Coast region - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Dominant groups

Analysis of the need for assistance of people in the Limestone Coast region compared to Regional SA shows that there was a lower proportion of people who reported needing assistance with core activities.

Overall, 5.3102% of the population reported needing assistance with core activities, compared with 6.2296% for Regional SA.

The major differences in the age groups reporting a need for assistance in the Limestone Coast region and Regional SA were:

- A *smaller* percentage of persons aged 85 and over (37.8% compared to 41.7%)
- A *smaller* percentage of persons aged 75 to 79 (11.8% compared to 13.0%)
- A *smaller* percentage of persons aged 70 to 74 (8.1% compared to 9.2%)
- A *smaller* percentage of persons aged 60 to 64 (5.4% compared to 6.5%)

Emerging groups

The major differences in the age groups reporting a need for assistance between 2011 and 2016 in the Limestone Coast region were in the age groups:

- 20 to 59 (+123 persons)
- 65 to 69 (+103 persons)
- 70 to 74 (+60 persons)

Limestone Coast region
Migration summary

In the Limestone Coast region, a higher rate of people did not change address (59.4%), while a lower rate (30.4%) moved from elsewhere in Australia, and a lower rate (2.1%) moved from overseas. A total of 12,438 people, or 66.9% of those who moved within Australia, moved within the Limestone Coast region.

Migration, or residential mobility, together with births and deaths are significant components of population change in Australia. Migration is the most volatile component of population change and can be affected by changing housing and economic opportunities such as housing affordability issues or the mining boom. The three main types of migration are overseas migration, interstate migration and within-state migration, of which within-state is the most common and largely involves moves between neighbouring areas within an urban or regional setting.

Looking at the level and type of migration in the Limestone Coast region can indicate whether the population is sedentary and likely to be in the area for a long time (and perhaps have significant ties to the community), or transient, and likely to move on. Related topics which can be viewed to get a clearer picture of population mobility include Age Structure (young adults are likely to move more often) and Housing Tenure (generally renters move more often while home ownership indicates a more stable population).

This table shows the broad trends of movement between the Limestone Coast region and the states/territories of Australia, and from overseas over the 5 years from 2011-2016. For more detail on local movements within the state, please refer to the Migration by age by location page.

Migration between the area and other States/Territories

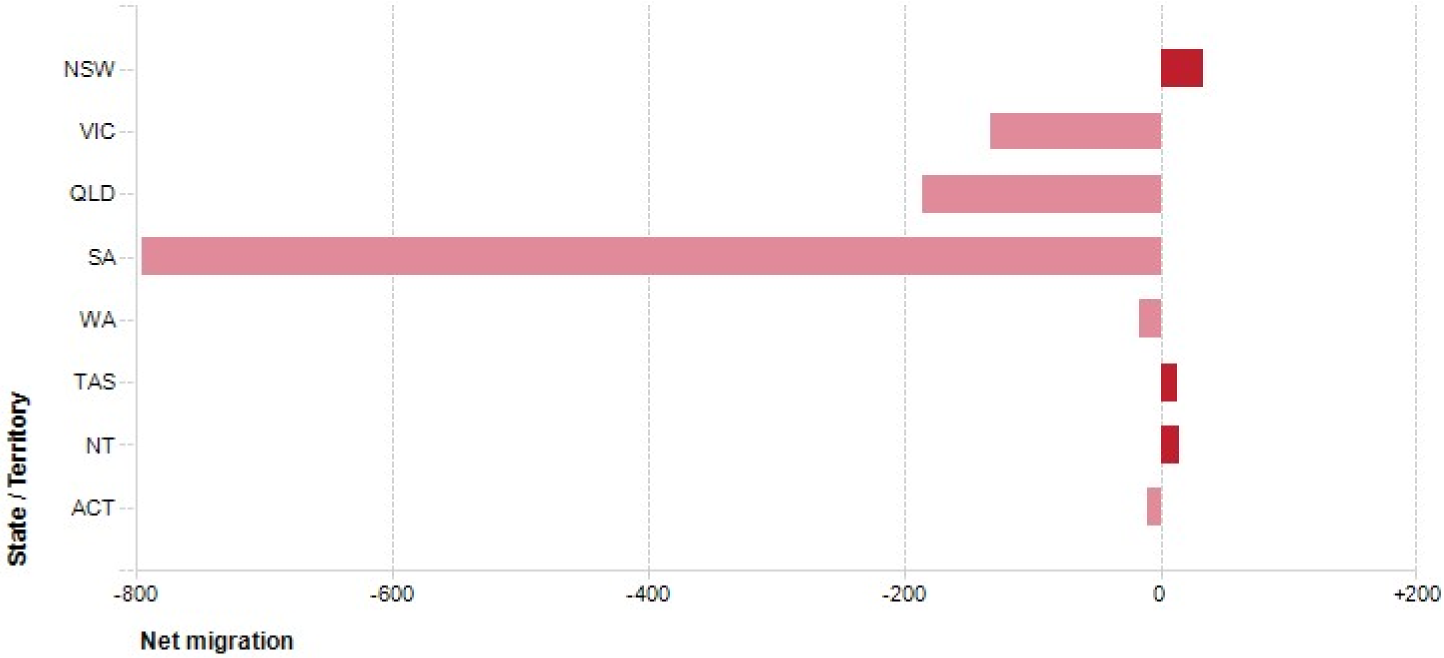
Limestone Coast region

State / Territory	In migration	Out migration	Net migration
New South Wales	341	308	33
Victoria	1,381	1,513	-132
Queensland	428	613	-185
South Australia	2,850	3,645	-795
Western Australia	263	279	-16
Tasmania	78	65	13
Northern Territory	147	132	15
Australian Capital Territory	14	25	-11
From Overseas	1,257	--	--

Source: Australian Bureau of Statistics, Census of Population and Housing , 2016 (Usual Residence Data). Compiled and presented in profile.id by .id , the population experts.

Population movement by State/Territory

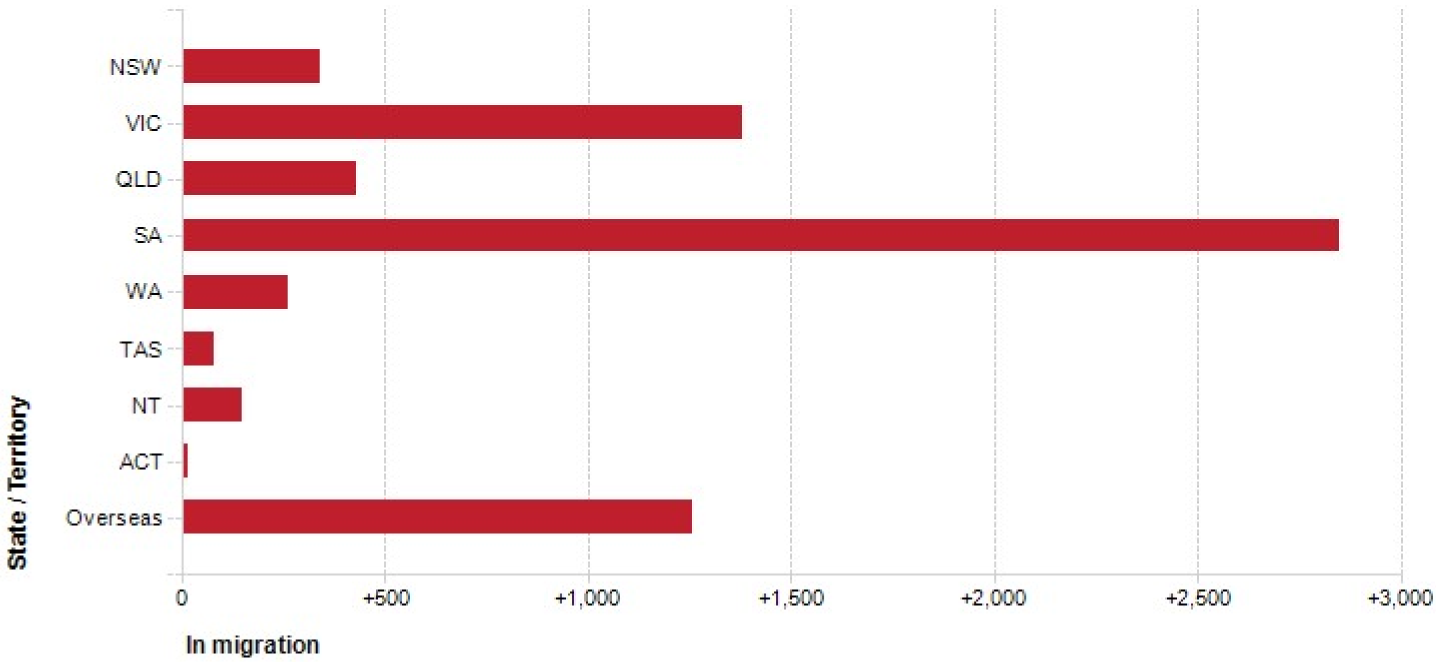
Limestone Coast region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data)
Compiled and presented in profile.id by .id, the population experts.

In migration by State/Territory

Limestone Coast region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data)
Compiled and presented in profile.id by .id, the population experts.

Limestone Coast region
Migration by age

The age structure of people who move into and out of the Limestone Coast region is strongly influenced by the residential role and function of the area and can influence demand for particular services. For instance, inner city areas near employment, education and entertainment tend to attract many young people in their late teens and early twenties, who move out in their late twenties and thirties to start families in suburban areas. Rural areas tend to lose young people and gain older families and retirees.
Understanding the Limestone Coast region's attraction to different age groups helps to plan services for the community as well as advocating with other levels of government and private enterprise to provide infrastructure, employment opportunities and facilities which may help to retain age groups which are otherwise leaving the area.

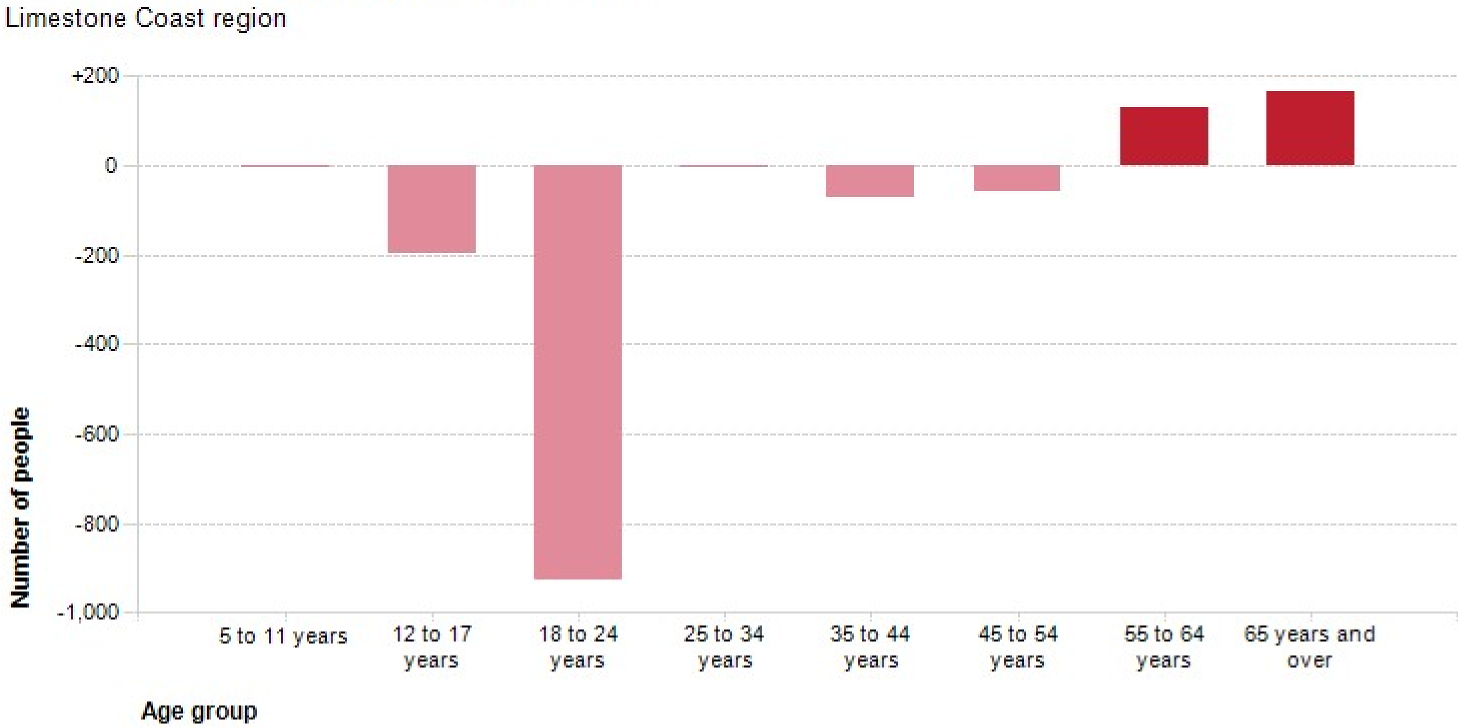
Migration by age group 2016

Limestone Coast region

Age group	In migration	Out migration	Net migration
5 to 11 years	+577	-581	-4
12 to 17 years	+301	-497	-196
18 to 24 years	+446	-1,373	-927
25 to 34 years	+953	-954	-1
35 to 44 years	+631	-705	-74
45 to 54 years	+457	-516	-59
55 to 64 years	+491	-362	+129
65 years and over	+538	-373	+165
Total population	+5,502	-6,586	-1,084

Source: Australian Bureau of Statistics, Census of Population and Housing , 2016 (Usual Residence Data). Compiled and presented in profile.id by .id , the population experts.

Net migration by age group 2016



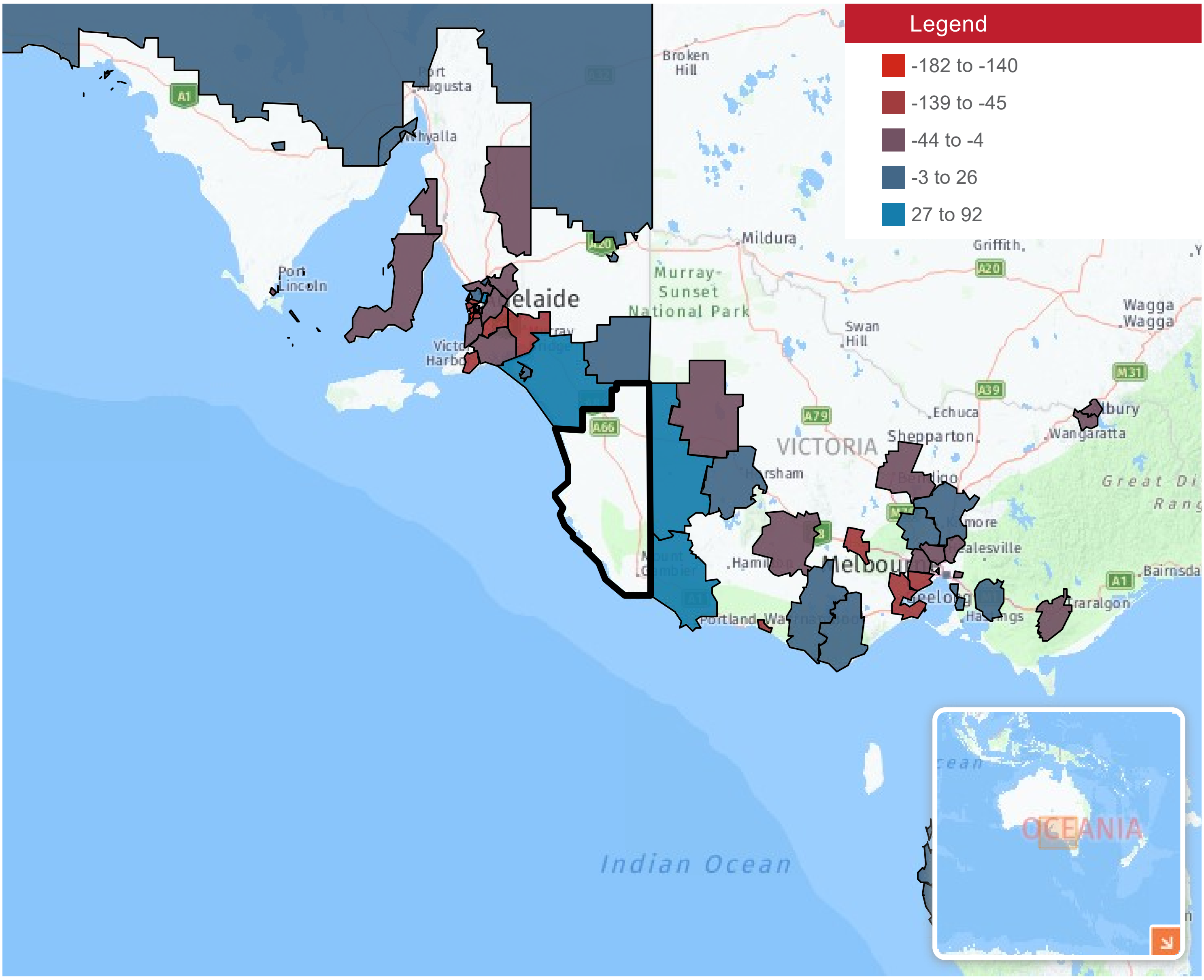
Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residents data)
Compiled and presented in profile.id by .id, the population experts.

Limestone Coast region
Migration by age and location

The age structure of people who move into and out of the Limestone Coast region is strongly influenced by the residential role and function of the area and can influence demand for particular services. For instance, inner city areas near employment, education and entertainment tend to attract many young people in their late teens and early twenties, who move out in their late twenties and thirties to start families in suburban areas. Rural areas tend to lose young people and gain older families and retirees.
Understanding the Limestone Coast region's attraction to different age groups helps to plan services for the community as well as advocating with other levels of government and private enterprise to provide infrastructure, employment opportunities and facilities which may help to retain age groups which are otherwise leaving the area.

Map of net gains and losses by LGA

Limestone Coast region - between 2011 and 2016



Source: Australian Bureau of Statistics, Census of Population and Housing 2016.
Compiled and presented in profile.id by .id, the population experts.

Net gains and losses by LGA

Limestone Coast region - between 2011 and 2016

LGA	In migration	Out migration	Net migration
Glenelg (S)	234	142	+92
West Wimmera (S)	114	60	+54
Tea Tree Gully (C)	134	90	+44
The Coorong (DC)	104	68	+36
Alice Springs (T)	43	16	+27
Colac-Otway (S)	29	8	+21
Horsham (RC)	59	40	+19
Salisbury (C)	168	151	+17
Mid-Coast (A)	20	3	+17
Barkly (R)	17	0	+17

Source: Australian Bureau of Statistics, Census of Population and Housing , 2016 (Usual Residence Data). Compiled and presented in profile.id by .id , the population experts.

.id the population experts

ACIL ALLEN CONSULTING

REPORT TO
CITY OF MOUNT GAMBIER

AUGUST 2017

MOUNT GAMBIER CITY GROWTH STRATEGY

2017-2027

EXECUTIVE SUMMARY

Mount Gambier has a strong, diverse and vibrant economy but, like South Australia, is at the cusp of major economic transition. Changing comparative advantage is impacting on traditional industry sectors that have underpinned the economy. This provides both exciting opportunities and threats, and requires new skills, different business models, innovation and resilience to respond.

Mount Gambier is fortunate to have many competitive strengths and advantages from which to build, including:

— an abundance of natural and economic resources: fertile land, forestry and agricultural resources, renewable energy and water

— a relatively young population: with population growth in all cohorts, including in the 15-64 year old group; the ability to retain its workforce is a relative strength for the City

— good community infrastructure: including health and education facilities

— outstanding tourism potential: including natural assets such as the iconic Blue Lake and surrounding regions as well as world class food, wine and adventure tourism offerings.

— a strong heritage and vibrant arts and cultural sector

— an enviable lifestyle and quality of life, with affordable housing and excellent services to support a growing community.

An analysis of the comparative strengths of the City as well as global and national; trends highlights **three industry sectors which are likely to offer the greatest potential for future growth**, these are:

— **Tourism, events and the arts:** increase in domestic and international tourism with a focus on food and wine tourism, arts, culture, events and natural assets.

— **Agribusiness and clean green economy:** capitalise on region's natural resources, renewable energy, forestry, agriculture, cattle and seafood to add value, attract investment and build new businesses.

— **Health and community services:** growth in heath, aged care and community services and leverage opportunities from population ageing.

Fundamentally, the City's economy will be underpinned by the growth of existing and new small to medium sized businesses, including in retail and professional services.

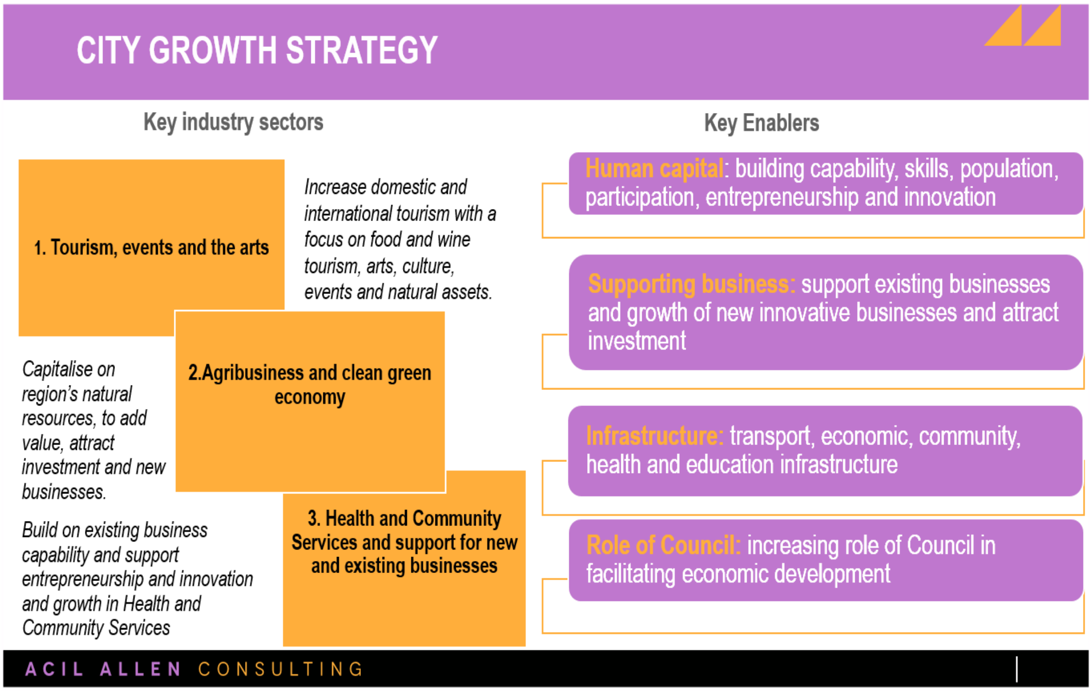
To facilitate growth in these sectors **the City will need to focus on a number of key enablers including**:

— **Building human capital:** building capability, skills, population, participation, entrepreneurship and innovation

— **Supporting business**: providing the right environment to support existing businesses, facilitate the growth of new innovative businesses and attract investment

- **Investment in economic infrastructure:** is one of the key enablers for unlocking the economic development potential of Mount Gambier; this includes transport infrastructure, utilities as well as tourism and community infrastructure.
- **Role of Council**: to implement the *City Growth Strategy* the Council will need to play an increasingly important role in economic development in the future, however, the City of Mount Gambier by itself will not be able to fully implement the *City Growth Strategy*. Full implementation will require strong cooperation between key stakeholders to deliver on a shared economic development vision.

FIGURE ES 1 KEY INDUSTRY SECTORS AND ENABLERS



SOURCE: ACIL ALLEN

The *City Growth Strategy* sets a number of headline targets in key areas, and while a number of actions can be facilitated within existing resources, others will require the commitment of specific resources by Council over the next ten years.

1 BACKGROUND AND STRATEGY SUMMARY

1.1 Introduction

The City of Mount Gambier has taken a pro-active role in facilitating economic development, working with business and the local community to help stimulate growth and opportunity. This includes building a smart digitally connected City, increasing investment in infrastructure, helping to grow tourism and events, improving planning and business support, and accelerating innovation and opportunities for business.

The *City Growth Strategy 2017-2027* synthesises much of this activity and builds on (and complements) existing plans and strategies developed by Council and industry, which have involved extensive community consultation. These include:

— *A Futures Paper for City Development-City of Mount Gambier*
— *City of Mount Gambier Community Plan 2016-2020*
— *Building a Connected Regional City: A Digital Strategy and Action Plan for the City of Mount Gambier*
— *Changing the Tourism Culture: An Industry Plan to Grow Mount Gambier's Tourism Economy*

The *City Growth Strategy 2017-2027*, while an economic strategy, is fundamentally about people and the community. It is about providing opportunities now and in the future, creating rewarding and well paid jobs for both young and old. It is also about building capability and the resilience of the City, so it can grow, adapt and harvest the benefits of change.

The strategy was developed following a review of Mount Gambier's comparative strengths and data on major trends at both the national and international level, as well as an analysis of local data (including the *Economic Scorecard for City of Mount Gambier and Comparative Regions*), which together have provided a rich evidence base to support future directions.

1.2 Global and national trends and their impacts

Mount Gambier's economy will be influenced by local, national and global trends. These trends will have varying influences, some having a significant impact and providing an opportunity for the City, while others will be very much driven by exogenous factors for which the City has little capacity to control or capitalise on.

ACIL Allen has overlaid national and global trends with our understanding of local factors to try to determine the likely impact of these trends on the City and identify opportunities and strategic options.

Smart cities digital disruption

Rapid changes in technology, along with the digitisation of the economy and increased access to data, are providing exciting opportunities for local governments and economies. Cities around the world are moving to harness the increased access to data, enhance connectivity, improve content and build the capability of the community to develop Smart Cities.

Mount Gambier has developed *A Digital Strategy and Action Plan* designed to use new digital technologies, improve content and capability to better provide services, engage with the community, increase productivity and support innovation, creativity and the growth of new businesses.

Changing nature of work

The Australian economy is changing rapidly, bringing with it significant changes to the nature of work and the types of jobs and skills required for the future. Increasing digitisation of the economy, automation, use of robotics and augmented intelligence will all change the nature of work.

Combined with this we are seeing an increasing casualization of the workforce, a rapid increase in co-working spaces and a world in which young people will increasingly have multiple jobs and numerous careers throughout their working life. These changes are already impacting on the nature of employment in Mount Gambier and will intensify over the next ten years. Governments at all levels have an important role in supporting communities in adjusting and responding to these changes.

Ageing of the population

The ageing of the population is a global and national trend and for Mount Gambier the proportion of population over 65 years will increase by 31.5 per cent over the next ten years to around 22 per cent of the population in 2026. This will have implications for labour force participation and the future workforce in Mount Gambier, but will also create opportunities in terms of attracting mature age tourists, investment and people, based on the region's lifestyle and affordability as a retirement destination.

Sustainability, clean and green

The global focus on increasing sustainability, reducing carbon emissions and clean and green produce provides possibly the biggest opportunity for Mount Gambier and surrounding regions. The real value of food consumption in both China and India is projected to double between 2009 and 2050 as a result of population growth and rising incomes.

Farmers in Australia are already seeing the benefits of strong demand combined with a good season, with net farm cash income estimated at $25.7 billion in 2015-16 well above the 20 year average of $15.6 billion. The opportunity for Mount Gambier and the region is not to be the food bowl of Asia, but to provide high value food and fibre based on the regions clean and green credentials and local innovation and value adding.

Energy disruption

Australia and South Australia, in particular, will continue over the next ten years to transition away from a carbon based economy with increasing use and investment in renewables. Most renewable technologies, have until recently, supplied peaking or intermediate capacity but advances in battery storage will see the next wave of investment to support renewable generation with battery back-up, as well as an increase in localised distributed generation and a shift by industry and communities to "off grid" solutions.

Mount Gambier is well placed in terms of renewable energy options to capitalise on this growth and attract increased investment in this sector.

Globalisation, emergence of China

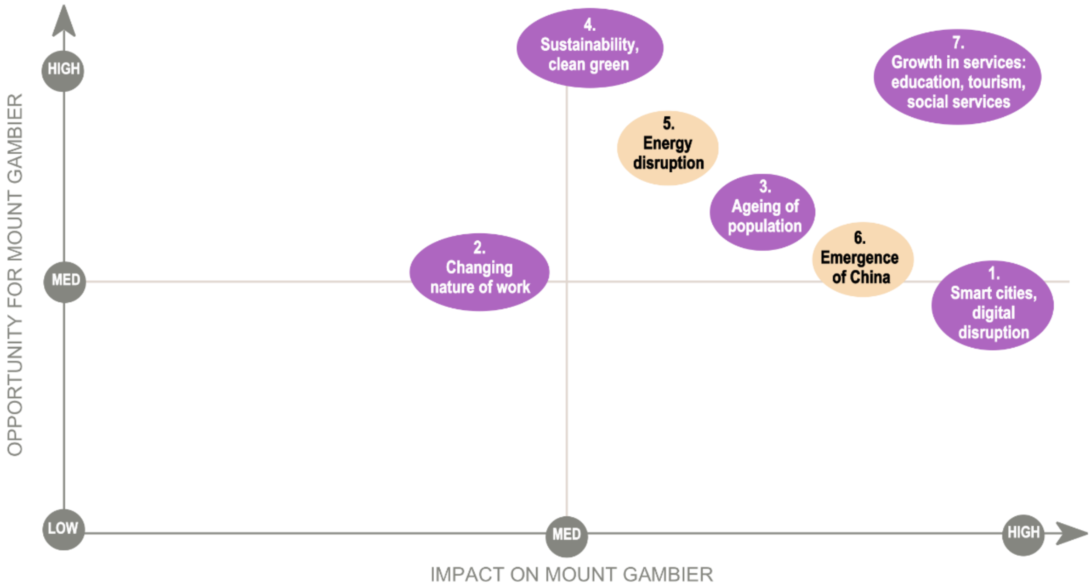
The increasing growth of Asia (in particular, China and India) will see an ongoing shift in economic gravity to the east over the next ten years, with Asia becoming both the largest producer and consumer of goods and services. From Mount Gambier's viewpoint, this growth in Asia will increasingly determine future exports, migration, tourism and foreign direct investment and will have a significant impact on the City in the years ahead.

Growth in services, education, tourism and social services

The comparative advantage of Mount Gambier will continue to shift dramatically over the next ten years, with an ongoing shift away from manufacturing to a service and knowledge based economy with a greater focus on tourism, business services, education and health services. An ageing population and increasing incomes in Asia will underlie the growth in tourism and health expenditure. This shift presents itself as both a potential threat to traditional industries, but also one of the biggest opportunities for the City.

The impact on, and opportunity afforded to, Mount Gambier by the trends discussed above are shown in and summarised in Table 1.1.

FIGURE 1.1 THE IMPACT AND OPPORTUNITY OF TRENDS ON MOUNT GAMBIER



SOURCE: ACIL ALLEN

TABLE 1.1 MOST SIGNIFICANT TRENDS FOR MOUNT GAMBIER

	Trend	Impact on City	Opportunity for City
1	Smart cities, digital disruption	High	Med
2	Changing nature of work	Med	Med
3	Ageing of population	High	Med
4	Sustainability, clean green	Med	High
5	Energy disruption	Med/high	High
6	Globalisation, emergence of China	High	Med/high
7	Growth in services: education, tourism, social services	High	High

SOURCE: ACIL ALLEN

1.3 Competitive advantages

As a regional centre servicing a regional population of 65,000 and the second largest City in South Australia, Mount Gambier plays an important role in the economic and social development of the Limestone Coast and the State.

The Futures Paper for City Development: Strategies for a prosperous and resilient Mount Gambier identified four key areas of focus for developing a resilient City:

i) a highly trained and well educated population
ii) location
iii) a diversified economy
iv) an excellent climate with abundant natural resources and rich heritage

Based on these aspirations Mount Gambier has many competitive strengths and advantages from which to build, including:

— **an abundance of natural and economic resources**, including fertile land, forestry and agricultural resources, renewable energy and water means that the City is well positioned to cater for significant growth and attract investment
— **a relatively young population**; contrary to some other regional cities, Mount Gambier has seen population growth in all cohorts, including in the 15-64 year old group; the ability to retain its workforce is a relative strength for the City
— **good community infrastructure** including education facilities, with nine schools and a local TAFE and University of South Australia campus as well as higher education delivery by Flinders University.
— **outstanding tourism potential**, including natural assets such as the iconic Blue Lake and surrounding regions as well as world class food, wine and adventure tourism offerings.
— **a strong heritage and vibrant arts and cultural sector**
— **an outstanding lifestyle and quality of life**, with affordable housing and excellent services to support a growing community.

An analysis of the comparative strengths of the City as well as global and national; trends highlights a number of industry sectors which are likely to offer the greatest potential for future growth, these are: tourism, events and the arts, agribusiness and clean green economy, health and community services. Fundamentally, the City's economy will be underpinned by the growth of existing and new small to medium sized businesses, including in **retail and professional services** see Figure 1.2.

FIGURE 1.2 KEY INDUSTRY SECTORS

Tourism, events and the arts: increase in domestic and international tourism with a focus on food and wine tourism, arts, culture, events and natural assets.

Agribusiness and clean green economy: capitalise on region's natural resources, renewable energy, forestry, agriculture, red meat and seafood to add value, attract investment and build new businesses.

Health and community services: growth in heath, aged care and community services and leverage opportunities from population ageing.

SOURCE: ACIL ALLEN

To facilitate growth in these sectors the City will need to focus on key enablers (Figure 1.3) including:

— building human capital
— supporting business
— investment in infrastructure
— increasing the role of Council in economic development

FIGURE 1.3 KEY ENABLERS

Building human capital: building capability, skills, population, participation, entrepreneurship and innovation

Supporting business: providing the right environment to support existing businesses, facilitate the growth of new innovative businesses and attract investment

Investment in infrastructure: investment in key economic infrastructure including, transport, community and health and education infrastructure

Role of Council: increasing the role of Council in facilitating economic development

SOURCE: ACIL ALLEN

The City of Mount Gambier has a diversified economy, employed an estimate 10,700 Full-Time Equivalents (FTEs) in 2014-15 and had a Gross Regional Product (GRP) of $1.3 billion. (Econsearch, 2017). The key contributors to employment and growth are:

- *Health care and social assistance* (16.4 per cent of FTE employment and 10.1 per cent of GRP)
- *Manufacturing* (14.7 per cent of FTE employment and 10.4 per cent of GRP)
- *Retail trade* (12.3 per cent of FTE employment and 6.8 per cent of GRP)
- *Education and training* (11.3 per cent of FTE employment and 6.5 per cent of GRP)
- *Agriculture, forestry and fishing* (9.3 per cent of FTE employment and 17.3 per cent of GRP)
- *Construction* (7.5 per cent of FTE employment and 7.2 per cent of GRP)

The City's economy is export orientated ($1.6 billion of exports in 2014-15), with agriculture, forestry and fishing accounting for 28.8 per cent, manufacturing 19.6 per cent, tourism 11 per cent and health care 9 per cent. (Econsearch, 2017).

Mount Gambier, like many regional towns, also faces a number of challenges. The City faces a number of human capital weaknesses in particular, including:

- slow population growth, with the working age population projected to increase by 1.3 per cent between 2016 and 2026 for Mount Gambier and decline by 4.7 per cent for Limestone Coast (compared with a 4.1 per cent increase for SA); in total the region will lose 1,913 potential workers by 2026
- lower levels of school and post school attainment compared with South Australia as a whole
  - in terms of post-secondary attainment, the region has a significantly lower proportion of the adult population with Bachelor degrees or higher (10.9 per cent, compared with 22.4 per cent for South Australia as a whole)
  - based on the 2011 Census, 32.2 per cent of the population aged 15-64 in the Limestone Coast had attained Year 12 compared to 54.2 per cent for South Australia as a whole
- the City rates poorly in terms of innovation and start-up businesses, with a lower level of businesses start-ups than many other regional cities
- Mount Gambier is centrally located between Adelaide and Melbourne; while this can be an advantage in attracting tourists, the City is poorly served by public transport infrastructure, with relatively expensive regional flights, little competition and no rail services.

1.4 The City Growth Strategy 2017-2027

The Mount Gambier *City Growth Strategy 2017-2027* presents an action plan with a focus on:

- Building human capital
- Supporting businesses to grow.

The emphasis is on supporting both existing businesses and attracting and helping to grow new businesses, especially in areas of competitive advantage such as tourism, agribusiness and clean technologies and the health and community services sectors.

Investment and reforms will be required in a number of areas if the City is to reach its full economic potential. Implementing the *City Growth Strategy* will require strengthening key enablers, including:

- investment in critical economic infrastructure, and
- the Role of Council in economic development

The *City Growth Strategy* outlines specific actions which in many areas will require Council to play an increasingly important role in facilitating economic development if Mount Gambier is to fully realise its potential and pro-actively respond to a rapidly changing economy.

1.4.1 Building human capital

The three planks of the Human Capital stream of the strategy are to grow the City's population, use the ageing of the population to the City's advantage and enhance the skills and education outcomes of the community.

Population strategy

— Aim to increase the population of the City of Mount Gambier to 32,000 over the next ten years through an ambitious migration strategy that attracts skilled, business, humanitarian and inter and intrastate migrants, linked to emerging job and business opportunities.

Leveraging opportunities from the ageing of the population

— Position Mount Gambier as a leading City in terms of supporting mature workers and providing facilities and services for the aged, with the aim of creating an extra 1,200 jobs in the Health and Aged Care Sector by 2027.

Education

— Work with State Government, industry, education sector and the community to enhance skills and education outcomes and increase the attainment of higher education qualifications by local students from 10.9 per cent of population to 16 per cent by 2027.

1.4.2 Supporting business

The Council has an important role in not only providing the right environment and infrastructure to support existing businesses but to also facilitate the growth of new innovative businesses and attract investment to the City. The Supporting Business stream of the strategy includes five elements:

1. **Supporting local business**

— Engage and work closely with existing businesses to better understand their challenges and opportunities and help them grow and increase employment.

2. **Increasing support for start-up businesses**

— In partnership with State and Commonwealth Government and Universities develop a sustainable entrepreneurship ecosystem in Mount Gambier through the establishment of the *Mount Gambier Business Hub* to support the growth of start-up businesses in the City.

3. **Visitor economy**

— Support the tourism sector and stakeholders through marketing, promotion, international engagement and provision of infrastructure to position Mount Gambier as a significant tourism destination in South Australia, with the aim of doubling the number of tourists within a decade.

4. **Agribusiness and clean green economy**

— Promote the City as a prime location for regional headquarters to exploit the region's abundant renewable resources and spearhead innovation in advanced biofuels production based on timber products. Aim to increase local income by $1 billion over the next decade from investment and expenditure in new renewable projects.

5. **Promotion and investment attraction**

— To undertake a series of targeted campaigns over the next three years to better promote the City's and the region's competitive strengths, clean and green credentials, liveability and investment opportunities.

1.4.3 Investment in infrastructure

— Investment in economic infrastructure is one of the key enablers for unlocking the economic development potential of Mount Gambier; this includes transport infrastructure, utilities as well as tourism and community infrastructure.

1.4.4 Role of the Council in economic development

— The Council will need to play an increasingly important role in economic development in the future, which will require a redesign of existing governance arrangements, functions and responsibilities.

— Develop a comprehensive and targeted China, India and ASEAN engagement strategy with the community, business, tourism and education sectors aimed at increasing trade, migration, investment and bilateral relations in culture, education and the arts.

The key elements of the *City Growth Strategy 2017-27* are discussed in turn in the chapters that follow.

2

HUMAN CAPITAL

Investment and growth in the City's human capital is a key plank of the *City Growth Strategy*. It is fundamental to ensuring long term economic growth, increasing productivity, growing and creating new jobs and transitioning the economy.

In essence it is about building resilience and ensuring the City is able to retain and grow its population, build capability to innovate and adapt, enhance skills and education outcomes to prepare for the jobs of the future and increase opportunities to participate in the workforce.

The three pillars of this strategy are to grow the City's population, use the ageing of the population to the City's advantage, and enhance the skills and education outcomes of the community.

2.1 Population strategy

Action

Aim to increase the population of the City of Mount Gambier to 32,000 over the next ten years through an ambitious migration strategy that attracts skilled, business, humanitarian and inter and intrastate migrants, linked to emerging job and business opportunities.

Background

Based on current projections and trends the population of the City of Mount Gambier is projected to increase from 26,317 in 2016 to 27,498 in 2027. This is an increase of just 1,181 people.

Under this business-as-usual scenario, the City of Mount Gambier would face growing skills and labour shortages due to a decline in its working age population. The projected slow growth in the City's population would also impact on the viability and growth of existing businesses and the ability of the City to attract new businesses, especially in the services and retail sectors.

To maintain its position as a strong and vibrant regional centre, the City of Mount Gambier should aim for an aspirational target to increase its population to 32,000 people by 2027. This is an ambitious target which will require a step change in the City's focus on economic development and promotional activities. Fundamental to achieving this target will be the capacity to attract new investment, grow local businesses and create job opportunities and better promotion of the City's attractions as a place to live, work and invest.

The City, as a major regional centre, is fortunate to have access to an abundance of natural resources and facilities to service and support a substantial increase in population.

The City of Mount Gambier currently represents around 1.6 per cent of the State's population. Under the *South Australia's Strategic Plan* the State has a target to reach 2 million people by 2027 and if

Mount Gambier were to retain its share of South Australia's population, then this would require the City to grow to 32,000 by 2027.

ACIL Allen has modelled three population growth scenarios for the City of Mount Gambier. The baseline is a continuation of historic trends resulting in a Compound Annual Growth Rate (CAGR) of around 0.40 per cent. A mid case scenario (Scenario 1) sees the population increase to 32,000 by 2027 requiring a compound growth rate of 1.70 per cent per annum. Under a high growth scenario (Scenario 2) the population would increase to 40,000 by 2027 with an increase in total population of 3.88 per cent per annum compound.

TABLE 2.1 POPULATION GROWTH SCENARIOS AND CONTRIBUTORS TO GROWTH

Scenario	Population 2027	Growth rate per annum	Natural increase p.a. 2017 - 2027	Interstate migration p.a. 2017 - 2027	Intrastate migration p.a. 2017 - 2027	Overseas migration p.a. 2017 - 2027	Total migration p.a. 2017 - 2027
Baseline	27,498	0.40%	83 - 135	45 – 47	99 – 103	52 – 57	89 - 133
Scenario 1	32,000	1.79%	170 - 203	111 – 132	92 – 110	100 – 119	303 – 362
Scenario 2	40,000	3.88%	275 - 402	268 - 393	220 - 322	258 - 377	746 - 1092

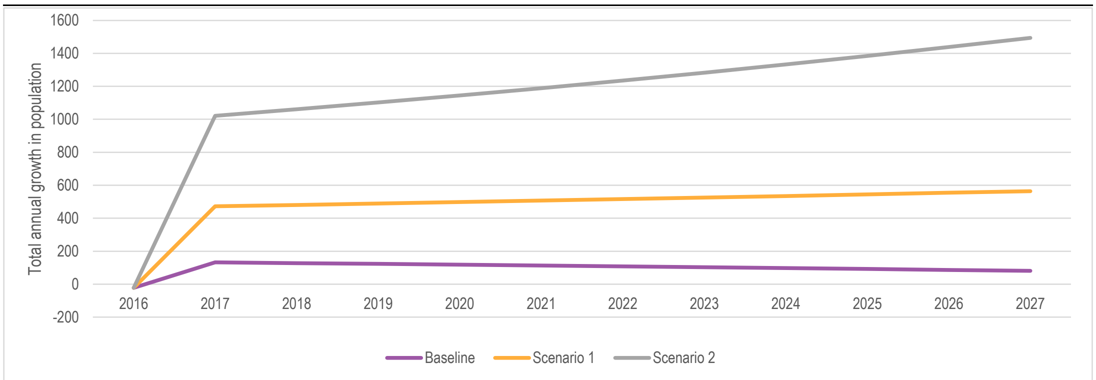
SOURCE: ACIL ALLEN

Under the baseline or business-as-usual scenario the population would grow between 89 to 133 people a year which, given the ageing of the population, would not be sufficient to meet ongoing workforce demands.

The mid-growth Scenario 1 would see population growth in line with the growth plans for South Australia as a whole under the *South Australia Strategic Plan* and would require an increase in migration of around 300 - 360 per annum equally shared equally between interstate, intrastate and overseas migration (see Table 2.1and Figure 2.1).

The high-growth Scenario 2 is premised on the City of Mount Gambier becoming a major growth centre in the State with a strong and renewed focus on economic growth, attracting investment and supporting the growth of local businesses to sustain a growth in migration of between 750 and 1,090 people a year from interstate, intrastate and overseas migration.

FIGURE 2.1 INCREASE IN ANNUAL MIGRATION UNDER EACH SCENARIO



SOURCE: ACIL ALLEN

Inter and intrastate migration

A key focus of attracting increased inter and intrastate migration should be a focus on job opportunities as well as liveability for both young families and retirees.

The median house price in Mount Gambier is $249,500[1] compared with $452,000 in Adelaide[2] and $575,000 in Melbourne[3]. Given growing concerns regarding housing affordability, there is potential to both attract younger families as well as retires who can benefit not just from increased affordability but the many benefits offered by the City that suit their lifestyle.

Overseas migration

Overseas migration in Mount Gambier increased by more than 25 per cent between 2011 and 2016, compared with a 0.4 per cent increase in Australian born residents.

The increased overseas migration has included refugee and humanitarian settlement, with increased migrants from Afghanistan, Burma, India, and Africa.

There is significant research to support that migration, rather than taking local job opportunities, can be a catalyst for future job creation through business start-ups and by filling skilled vacancies in areas of labour shortage. A high proportion of new businesses are established by migrants and many of our exporters are migrants, as can be seen with recent waves of Chinese and Indian migrants.

In South Australia business migration, especially from China, has doubled in recent years and South Australia has attracted more applicants than any other State under the 132 Business Talent Visa.

Regional Development Australia Limestone Coast has been active in working with agents in connecting investors to opportunities in the region as well as supporting the growth in humanitarian migrants linked to regional employment opportunities.

Action and implementation

To be successful in attracting migrants, it will be important to have a targeted migration strategy that links new migration to employment and business opportunities. It will also be essential to have broad community support in pursuing an ambitious growth plan for the City.

While the growth in the City's population will generate increased demand, it will be essential that the growth in population is supported by new business growth and increased investment opportunities.

In this regard the City, in partnership with industry, should undertake an audit of business opportunities as well as a skills assessment of key growth sectors in Mount Gambier and the region to identify opportunities for both workforce development and skilled and business migration.

While overseas migration including business, skilled and humanitarian migrants will be an important part of future population growth the Council should focus its efforts on increasing interstate and intrastate migration, targeting both younger families and seniors promoting liveability, services and affordability

Resources and partners

- A dedicated resource would be acquired to work with industry, the community and key stakeholders at the local, state and Commonwealth level to design and implement the migration strategy (including any marketing strategy)
- Key partners would include:
  - Immigration SA (Department of State Development)
  - Regional Development Australia Limestone Coast
  - Mount Gambier Chamber of Commerce

[1] Based on annual sales data to 24 July 2017, data supplied by RP Data Pty Ltd, Corelogic
[2] March 2017 quarterly data for Adelaide metropolitan area, SA Department of Planning, Transport and Infrastructure
[3] March 2017 quarterly data for Melbourne metropolitan area, Vic Department of Environment, Land, Water and Planning

2.2 Public sector employment

Another key element of a population strategy should be to increase public sector employment in the City of Mount Gambier with the aim to increase State and Commonwealth Public Sector employment in Mount Gambier by 500 people over the next ten years.

Only 2.1 per cent of Mount Gambier's workforce is engaged in the public administration. This ranks the City in the bottom quintile of regional cities at 446 out of 563 cities nationally.

The Federal Government has recently announced a new decentralisation push, requiring all Federal Ministers to justify whether agencies within their portfolios should remain in capital cities. Ministers will be required to report to Cabinet by August 2017 regarding which agencies or functions are suitable for relocation to regional areas.

— The Victorian Government has likewise recently announced that 750 public service jobs will be relocated to regional areas. The Government will develop three 'GovHubs' to be located at Ballarat, the Latrobe Valley and Bendigo which will co-locate public agencies and may include private firms. The 2017-18 Victorian Budget committed $47.8 million for the Ballarat hub.
— In considering relocation of public sector roles to the regions governments have traditionally looked at relocation of whole agencies or parts of agencies, which has had limited uptake as the costs have often outweighed the benefits for agencies and there has been staff and union resistance to forced relocation. An alternative approach is to target those roles within agencies that need not be located within capital cities and provide the opportunity to staff to relocate to a regional city.

Public sector employment action and implementation

— In partnership with the South Australian Office of Public Sector and the Department of Primary Industries and Regions SA (PIRSA) undertake a 90 Day Project to develop a business case for the relocation of public servants to Mount Gambier.
— The focus will be on identifying public sector roles across agencies that could be located outside of capital cities and establishing a "GovHub" in Mount Gambier for a number of agencies to accommodate staff. Staff will be offered the opportunity to relocate on a voluntary basis and could be offered some relocation assistance to support the move.
— The business case should cover:
  - costs and benefits, including public and private benefits and costs
  - administration and accommodation issues
  - relocation costs and departmental savings
  - industrial relation issues
  - identification and selection of appropriate roles, functions and personnel eligible for relocation
  - broader regional economic development benefits.

The Commonwealth could also be invited to participate in the business case or through a separate exercise undertaken with the Commonwealth.

Partners

— South Australian Minister for the Public Sector
— South Australian Minister for Regional Development
— South Australian Office of Public Sector
— Department of Primary Industries and Regions SA

2.3 Leveraging opportunities from the ageing of the population

Action

Position Mount Gambier as a leading City in terms of supporting mature workers and providing facilities and services for the aged, with the aim of creating an extra 1,200 jobs in the sector by 2027.

Background

Currently around 17 per cent of Mount Gambier's population is over the age of 65, similar to SA as a whole.

The proportion of the population over 65 years in Mount Gambier will increase by 31.5 per cent over the next ten years to around 22 per cent of the population in 2026.

The working age population will only increase by 1.3 per cent between 2016 and 2026 for Mount Gambier, and decline by 4.7 per cent for Limestone Coast (compared with a 4.1 per cent increase for SA). In total the region will lose 1,913 potential workers by 2026.

The Health Care and Social Assistance sector is already the largest employer in Mount Gambier, accounting for 18.6 per cent of total employment (2,079 people in 2014-15), and this will increase significantly over the next decade with the ageing of the population.

The Health Care and Social Assistance sector has made the largest contribution to employment growth across Australia over the last 15 years, and much of this is due to the changing demographics and ageing of the population.

Over the 5 years to 2020, the Department of Employment estimates that there will be a 22.5 per cent growth in the employment nationally for Health and Community Support Workers, Carers and Aides and Personal Service Workers, and that 35 per cent of this employment is in regional areas.

Training for many of the workers in the sector is through vocational education and training (42 per cent), with 19 per cent of the jobs requiring a bachelor degree or higher. Around 68 per cent of the workers in the sector are female.

The South Australian Training and Skills Commission estimates that, over the period 2015 to 2020, the health and community services sector will account for 22 per cent of the training activity in South Australia, with the need for 33,000 VET qualifications and 18,000 higher education qualifications.

Ageing is also creating significant economic opportunities arising from the spending patterns of so called "baby boomers". In Australia, 50 to 69 year olds hold more than 40 per cent of the nation's wealth and people aged between 55 and 74 had the fastest growing household wealth of any age group between 1994 and 2012[4]

The Economic Development Board has highlighted through its *Ageing Well Strategy* that the ageing demographic presents an opportunity, and that communities and regions that respond to this trend can benefit by providing services, supports, increasing participation and developing industries around medical technologies.

There are six public hospital and regional community health services in the Limestone Coast Region and Mount Gambier, providing a strong foundation for service delivery now and to build on for future growth.

Implementation

The City of Mount Gambier should focus on three areas in leveraging economic opportunities from the ageing of the population: increasing the participation of mature age workers, providing infrastructure and building a pipeline of skilled labour for the future growth of the health and aged care sector, see Figure 2.2.

[4] Per Capita 2014, *Blueprint for an Ageing Australia*, Surrey Hills

FIGURE 2.2 LEVERAGING OPPORTUNITIES FROM AGEING OF THE POPULATION

Participation: *maintain and increase the participation of mature aged workers in the workforce*

Infrastructure: work with the private sector to ensure the supply of approporiately zoned land provision or other infrastructrure and services to maximise the growth potential of the health and aged care sector

Skills: build the pipeline of skilled labour to create an extra 1,200 jobs in the health and aged care sector by 2027

SOURCE: ACIL ALLEN

Participation

Given the projected decline in working age population, it will be important to maintain and increase the opportunities for mature workers to participate in the workforce.

— A key objective should be to provide increased opportunities through Adult and Community Education, TAFE SA and the University of SA for the upskilling of mature age workers to meet the changing skill needs in the region, including provision of short courses in relation to new technologies and health related services.

— Older people will continue to be major contributors to Mount Gambier's economy and future prosperity, both through participation in the workforce and business and as a potential wave of new entrepreneurs as they embark on post retirement career changes. The *Mount Gambier Business Hub* should have a particular focus on supporting these "*Seniorpreneurs*".

Infrastructure

— The City of Mount Gambier should convene a roundtable with the health and aged care sector to determine future needs and identify potential barriers and facilitators of growth and work, including ensuring the supply of appropriately zoned land and other infrastructure and services to maximise growth potential of the health and aged care sector and investment in the sector in Mount Gambier.

— The City should take the lead in exploring with the private sector new models of urban design which allow older people to live independently at home longer through the provision of services and smart infrastructure and assistive technology.

Skills

— A *Health and Aged Care Workforce Blueprint* should be developed for Mount Gambier, and information on future job opportunities in the sector and training requirements shared with career advisors and counsellors in schools and Jobactive providers in the region, to build the pipeline of future workers for the growth of the health and aged care sector in Mount Gambier.

Partners

- Boandik Lodge Inc
- Resthaven
- Private sector over 55 years retirement villages
- SA Health, Mount Gambier and District Health Service
- TAFE SA
- University of South Australia
- Property Council SA

2.4 Education

Objective

Work with State Government, industry, education sector and the community to enhance skills and education outcomes and increase the attainment of school, VET and higher education qualifications by local students.

Background

In the this rapidly changing world it will be important that current and future generations in Mount Gambier have the skills required to fully participate in an increasingly knowledge based economy. This includes an overall quality education with a growing emphasis on science, technology and maths, as well as strong foundation and digital literacy skills for the community and increasingly higher levels of post school qualifications.

The Limestone Coast region has lower levels of school and post school attainment compared to South Australia as a whole. Based on the 2011 Census, 32.2 per cent of the population aged 15-64 in the Limestone Coast had attained Year 12 compared to 54.2 per cent for South Australia as a whole.

In terms of post-secondary attainment the region has a significantly lower proportion of the adult population with Bachelor degrees or higher at 10.9 per cent compared to 22.4 per cent for South Australia as a whole.

The region has a higher proportion of the population with Certificate III and IV level qualifications at 26 per cent compared with 24.1 per cent for South Australia.

The South Australian Training and Skills Commission estimate that by 2025 61 per cent of workers will be expected to hold a Certificate IV qualification or higher, and around half of all workers will be required to hold a Diploma or above.

Mount Gambier is serviced by nine schools, including public, independent and catholic colleges. While there are areas of excellence, an analysis of the National Assessment Program – Literacy and Numeracy (NAPLAN) results for years 3, 5, 7 and 9 indicates that significant improvement is required for the majority of students to reach the national average.

Considerable efforts have been made to improve education outcomes in Mount Gambier, yet little progress has been made in terms of higher education attainment. Many factors impact on this, including the limited course offerings available in Mount Gambier from universities, the additional costs of undertaking university studies for regional students and the aspirations of students and nature of local employment opportunities.

To make a long term change to education outcomes and *Turn the Curve* will require a strong commitment from all stakeholders and the community to implement change.

The Commonwealth Government has announced a new *Skilling Australians Fund* which will be supported by employers that sponsor skilled migrants. It is estimated that $1.5 billion will be available over four years in partnership with State and Territory Governments to support up to 300,000 apprentices, trainees, pre-apprentices and higher level skilled Australians.

Action and implementation

While education is predominantly the responsibility of the State Government, Universities, TAFE SA and the Independent and Catholic schools the Council can play an important role in terms of providing strong leadership with key stakeholders to build a genuine culture of learning within the community which over time will help avoid an education divide and better equip the community to realise the opportunities that come with change.

Success will only be achieved through a commitment by the community and key stakeholders, and this lends itself to an *Outcomes Based Accountability* (OBA) approach[5] similar to that adopted by Local Government Authorities in the United Kingdom or with the state of Maryland in the United States to produce measureable improvements in education outcomes for communities.

— The City of Mount Gambier should work with key stakeholders to lead an *Outcomes Based Accountability* or data-driven process to improve school and tertiary education outcomes in the City. This would include:
  - clearly identifying the stakeholders, including education institutions, government, community, industry and not for profit organisations that need to come together to implement the change
  - gaining commitment and buy-in from stakeholders at the highest level
  - clarifying the education outcomes that the community wants to address, and develop a solid evidence base of existing performance and choose clear indicators to measure the baseline and ongoing progress
  - developing an action plan which targets no more than four SMART criteria (Specific, Measurable, Achievable with clear Responsibility and Timelines)
  - leading a process for *Turning the Curve* on education outcomes in Mount Gambier, supported by clear and regular reporting
  - ensuring clear accountability for the implementation of actions and outcomes with fortnightly or monthly reporting and accountability.

The OBA process will identify a number of specific actions, which may include:

- maximise funding for apprentices and trainees for businesses in Mount Gambier under the Commonwealth's newly announced *Skilling Australia Fund*
- increase university scholarships or cadetships for local students
- working to increase the autonomy and ability of schools to respond to local issues
- support from industry to increase internships for University graduates
- increase course offerings and Associate Degrees by Universities and TAFE SA
- increase in foundation and digital literacy skills and Adult Community Education
- increase regional work placement opportunities in Mount Gambier for students in key disciplines such as medicine, teaching, aged care, social work, engineering and construction.

Resources and partners

— A General Manager within the City of Mount Gambier would be required to work with Council, the community, education providers, industry and key stakeholders to develop a shared vision for enhancing education and employment outcomes in the City, and better linking into existing programs, increasing linkages with industry and securing new resources where required.

— Key stakeholders would include:
  - Department of Education and Children Services
  - Principal Tenison Woods College
  - Principal St Martins Lutheran College
  - Catholic Education Office
  - Association of Independent Schools SA
  - Department of State Development
  - TAFE SA
  - University of SA

[5] Friedman, M. (2000). *Results-Based Accountability (RBA) and Outcomes-Based Accountability (OBA) Implementation Guide* [online]. Available: http://www.raguide.org

- Flinders University
- Adelaide University
- Mount Gambier Chamber of Commerce

ACTIONS FOR 2017-2020

1. **Implement a comprehensive migration strategy with a focus on increasing inter-State, intra-State and overseas migration.**
2. **Investigate with the South Australian Government the opportunity to increase public sector employment in the City of Mount Gambier by 500 people over the next ten years.**

3 SUPPORTING BUSINESS

3.1 Supporting local businesses

Objective

Engage and work closely with existing businesses to better understand their challenges and opportunities, and help them grow and increase employment.

Background

The City of Mount Gambier is fortunate to have a diversity of businesses across a range of sectors, including retail, professional services, tourism, manufacturing, hospitality, health and community services, agriculture and forestry, building and construction.

Over 95 per cent of these businesses are small to medium sized businesses, which will provide the foundation for future economic growth and job creation in the City.

Council can support these businesses by providing the best economic climate for growth including best practice regulation and planning, provision of infrastructure and services, facilitating better access to government services, international engagement and promotion and marketing of the City.

Action and implementation

— Undertake a comprehensive review of "red-tape" and regulation on business in the City and, where appropriate, look to reduce the regulatory impact and cost of doing business in Mount Gambier

— Work with the RDA Limestone Coast in undertaking a skills profile of existing businesses, and map the future skill needs for key growth sectors and develop a comprehensive workforce development plan to address the training, upskilling and future workforce development needs to support future growth in key sectors.

— Work with business, government and universities to strengthen the connections between existing businesses and universities, and provide better access to existing programs such as Innovation Vouchers and other supports to support collaboration and innovation.

Partners

— Department of State Development

— Commonwealth Department of Industry, Innovation and Science

— South Australian Universities

— Regional Development Australia Limestone Coast

— Mount Gambier Chamber of Commerce

3.2 Increasing support for start-up businesses

Objective

In partnership with State and Commonwealth Government and Universities, develop a sustainable entrepreneurship ecosystem in Mount Gambier through the establishment of the *Mount Gambier Business Hub* to support the growth of start-up businesses in the City.

Background

Small to medium sized businesses will be the growth engine of employment in Mount Gambier over the next ten years.

Start-ups are the largest contributor to job creation in Australia and contributed $146 billion to the Australian economy between 2004 and 2011, nearly 40 percent of the value adding in those years.[6]

While many start-ups are based in capital cities, regions and rural areas are increasingly playing an important role in the start-up economy. Access to high speed broadband enables technology based entrepreneurs to be located in the regions and there is increasing innovation and business start-up activity coming from agricultural producers.[7]

Government at all levels can support the SME sector and start-up businesses by helping to reduce the costs of doing businesses, cutting red-tape and unnecessary regulation and supporting the development of the necessary, infrastructure, skills and the economic climate for growth.

Significant efforts have been made in recent years to develop an entrepreneurial ecosystem in Adelaide, and while embryonic in many respects the city is seeing an emergence of many new ventures arising from greater collaboration, deeper engagement with Universities and support from government. The entrepreneurial ecosystem in Mount Gambier is almost non-existent with many new start-up businesses operating from home.

In terms of new business start-ups, the City ranks 400 out of 563 regions and has a relatively low proportion of business owner/managers as a proportion of its workforce, placing it in the bottom quintile at 459 out of 563 Cities in terms of innovation.[8]

The *Building a Connected Regional City: A Digital Strategy and Action Plan for the City of Mount Gambier* recommended a number of initiatives to encourage and support new businesses, innovation and start-ups.

Action

Facilitate with the private sector and Universities the establishment of the *Mount Gambier Business Hub* – a business incubator and co-working space in Mount Gambier that provides accommodation, services and supports for local start-ups. The *Mount Gambier Business Hub* could also be available for businesses and service providers from Adelaide or Melbourne to operate from.

The *Mount Gambier Business Hub* could include:

— Establishment as a not for profit independent corporation or be established on a commercial basis with service agreements and underwriting from Council as required
— Co-working space for local companies and potentially public sector employees
— Co-location with universities and research bodies to help strengthen the collaboration between industry, universities and research institutions and assist with the commercialisation of new technologies and services
— Provision of mentoring and networking opportunities and business advisory services from government and private providers
— Provision of digital engagement and social media training and support for local businesses

[6] Australian Government 2016, *Australian Innovation System Report 2016*, Department of Industry, Innovation and Science, Office of the Chief Scientist, Canberra.
[7] Universities Australia, 2017, Start up Smarts: Universities and the start-up economy, Universities Australia, 2017
[8] Regional Australia Institute, 2017

- Assistance for start-up firms to access funding opportunities from angel investors or grants from State and Commonwealth Government
- Entrepreneurial programs to develop and support local start-ups to identify and take advantage of regional development opportunities
- Encouraging skilled mature age people in the region to participate in the Hub by providing mentoring or coaching to younger entrepreneurs
- Provision of a design studio for product design or 3D printing.

It will be important that, as far as possible, the *Mount Gambier Business Hub* is established with strong commercial drivers and that it avoids the challenges faced by many business incubators of providing ongoing subsidised services and accommodation, with businesses struggling to be financially sustainable in the longer term.

Implementation

- The Council undertake a detailed feasibility study on the costs, funding and business model for the establishment of the *Mount Gambier Business Hub* and where possible leverage of State and Commonwealth support and services provided by Universities.
- The Council provide dedicated office space and fit out for the establishment of a business incubator and co-working space for start-up businesses, and seek expressions of interest from the private sector for the operation of the facility on a commercial basis over time.
- The City should continue to negotiate with local universities regarding the allocation of funding and dedicated services to support local students start-up businesses in the region and to provide "innovation" and commercialisation services through the *Mount Gambier Business Hub* that are linked to existing University commercialisation programs.

Partners

- Department of State Development
- PIRSA - Regional Development Fund
- The Commonwealth Government – Innovation Hubs
- Flinders University - New Venture Institute
- University of South Australia – Venture Catalyst Program
- Adelaide University – Entrepreneurship, Commercialisation and innovation Centre
- TAFE SA
- Regional Development Australia Limestone Coast
- Private sector
- Community groups

3.3 Investment attraction

Objective

Undertake a campaign over the next three years to better promote the City's and the region's clean and green credentials, liveability and investment opportunities.

Background

The global demand for food is expected to increase 70 per cent and the value of agricultural exports are forecast to be 140 per cent higher by 2050, as a result of increasing demand from the growing middle class in Asia, with the largest increases in real value expected for beef, wheat, milk and sheep meat.[9]

[9] Linehan, V, Thorpe, S, Andrews, N, Kim, Y & Beaini, F (2012), F*ood demand to 2050: Opportunities for Australian Agriculture*, Paper presented to the 42nd ABARES Outlook Conference, Canberra

Mount Gambier is already well placed to take advantage of rising export demand and building on its reputation for premium, clean and safe food for Asian markets.

Action and implementation

- Develop a comprehensive marketing campaign, including prospectuses and materials that promote the competitive strengths of the City and opportunities for business, migration, tourism and future investment.
- Undertake a targeted digital and online campaign that underpins the migration strategy to promote the affordability of housing and quality lifestyle to both young families and mature age workers.
- Better promote and market the many successful small, medium and large scale businesses that operate nationally and internationally from Mount Gambier to help underpin the attraction of new businesses and migrants to the region.

Partners

- Regional Development Australia Limestone Coast
- Limestone Coast Local Government Association
- Neighbouring Councils

ACTIONS FOR 2017-2020

1. **Work with the RDA Limestone Coast in undertaking a skills profile of existing businesses and map the future skill needs for key growth sectors and develop a comprehensive workforce development plan to address the training, upskilling and future workforce development needs to support future growth in key sectors, this plan will also help underpin the skilled migration strategy.**

2. **Undertake a detailed feasibility study on the costs, funding and business model for the establishment of a *Mount Gambier Business Hub* and where possible leverage of State and Commonwealth support and services provided by Universities.**

3. **Develop a comprehensive marketing campaign including prospectuses and materials that promotes the many competitive strengths of the City and opportunities for business, migration, tourism and future investment.**

3.4 Tourism

Objective

Support the tourism sector and stakeholders through marketing, promotion, international engagement and provision of infrastructure, to position Mount Gambier as a significant tourism destination in Australia, with the aim of doubling the number of tourists within a decade.

Background

Tourism Mount Gambier has developed an industry plan to grow Mount Gambier's Tourism, with the aim of increasing tourism revenue by 9.1 per cent per annum or 55 per cent over five years. This equates to an additional $57.1 million per annum in economic activity. This strategy would result in a doubling in the number of tourists over the next decade or a doubling in the average length of stay of tourists.

The Commonwealth International Visitor Survey shows that in the year to September 2016, the South East attracted 46,000 visitors who stayed a total of 252,000 nights in the region. The South East recorded the second highest number of visitors outside of Adelaide.

Tourism is an increasingly important contributor to Mount Gambier's economy and will be a long term growth sector of the economy.

Only around 8 percent of visitors to the Limestone Coast are international tourists and while this a relatively small percentage there is significant potential to grow international tourism numbers by offering authentic experiences especially food and wine offerings, targeted at Chinese tourists.[10]

There is an increasing trend in offering experiential tourism which provides an opportunity for Mount Gambier to leverage its natural attractions and food and wine sector to increase visitations.

Food and wine tourism is a key growth area for both domestic and international tourism. *Research* conducted in 2013 across 15 of Australia's key tourism markets, by BDA Marketing for Tourism Australia, showed that 'great food, wine, and local cuisine' are key influencers in holiday decision making for around 38 per cent of tourists.

Food and wine tourism now accounts for one in five dollars spent by international tourists in Australia. The efficacy of a wine tourism campaign by the South Australian Tourism Commission is highlighted in Box 2.1.

[10] South Australian Tourism Commission, Regional Tourism Statistics, December 2016

BOX 2.1 BAROSSA WINE TOURISM CAMPAIGN

The Barossa Wine Tourism Campaign undertaken by the South Australian Tourism Commission in 2014 highlights the potential benefits of marketing regional wine districts to change perceptions and increase tourism visitation and sales. The campaign targeted Sydney, Melbourne and Brisbane through television, digital and cinema advertising.

— 59 per cent of people surveyed associated the Barossa with "Quality food and wine", 39 per cent associated the region with "fresh regional produce" (BDA, Feb 2015).
— appeal of the TV commercial reached 64 per cent among the target audience of Food and Wine travellers.
— Barossa Visitor Information Centre recoded its busiest month ever in sales/bookings after the campaign
— tourism takings increased 14 per cent from 2012-13 to 2013-14 based on the ABS Survey of Tourist Accommodation
— online advertising through YouTube saw 630,208 views resulting in 9,351 hours of video being watched in Sydney, Melbourne and Brisbane.
— as at January 2016, Barossa was the most considered wine region in Australia, surpassing Margaret River (BDA Marketing Planning).

SOURCE: SOUTH AUSTRALIAN TOURISM COMISSION

China is one of Australia's fastest growing tourism markets, with 1.1 million Chinese visitors (aged over 15) coming to Australia in 2015–16. They spent a total of $8.9 billion, or approximately $1 in every $4 spent in Australia by international visitors.

There is an opportunity for South Australia and regional cities such as Mount Gambier to significantly increase tourism from China and this will require better marketing of opportunities and development of products and tours to better meet the needs of international tourists.

Recent research by Tourism Research Australia highlighted that some of the weaknesses seen by Chinese tourists visiting South Australia included a lack of great food and beverage offerings, a lack of iconic sights and landmarks, and a perception that it was a less safe destination than major gateway cities.

To significantly increase the number of domestic and international visitors to Mt Gambier and the surrounding region, it will be necessary to develop a truly iconic and unique attraction (preferably from an existing one). For example, the facilities around Blue Lake could be enhanced to include a lakeside café and restaurant (or even a Chinese-style teahouse/'yum cha' restaurant targeting Asian tourists). This would help maximise the Crater Lakes assets for more than they are currently including consideration of what has been successful elsewhere in Australia without impacting on the natural environment.

Action and implementation

— Provide leadership and support to the implementation of the *Tourism Mount Gambier Strategy* including:
  – better branding and promotion
  – investment in tourism infrastructure
  – attraction, support and growth of key events
  – increased international engagement and promotion
  – better and more effective coordination
— Implement the *Digital Strategy and Action Plan* for the City of Mount Gambier to better promote tourism opportunities in Mount Gambier, and develop content and connectivity with key domestic and international markets.

- In partnership with local wine and tourism bodies develop a marketing campaign to promote the regions food and wine tourism, and be in a position to leverage funds through the Commonwealth Government's proposed $50 million *Export and Regional Wine Support Package.*
- Enhance the facilities, services and infrastructure that supports visitation to the Blue Lake and work with the arts sector to sponsor and develop an iconic event/performance focussed on increasing visitation to the Blue Lake and the City.

Partners

- SA Tourism Commission
- Tourism Australia
- Commonwealth Export and Regional Wine Support Package
- Department of Primary Industries and Regions SA (PIRSA)
- Tourism Mount Gambier
- Limestone Coast Local Government Association

3.5 Agribusiness and clean green economy

Objective

Promote the City as a prime location for regional headquarters to exploit the region's abundant renewable resources, and spearhead innovation in advanced biofuels production based on timber products. Aim to increase local income by $1 billion over the next decade from investment and expenditure in new renewable projects.

Background

Mount Gambier and surrounding regions have an abundance of renewable energy and more renewable energy opportunities than any other city in Australia, including, wind, solar, geothermal, pumped-hydro and bio-fuels.

Despite current challenges with the provision of competitively priced base load electricity in South Australia, the long term trend will be the ongoing shift to renewable energy, including greater use of battery storage.

The South Australian government has a 50 per cent penetration target for renewable energy in 2050. The State's significant installed capacity in renewables has transformed into investment of $7.1 billion to date, with some $2.4 billion (or 41 per cent) of this occurring in regional areas.

Mount Gambier has a very high relative presence of timber resources, ranking 19 out of 563 in the Regional Australia Institute index. Naturally, this opens avenues for biomass powered energy production. Indeed, the City has already hosted the 2016 Bioenergy Roadmap Forum, laying ground for the spearheading of these initiatives in the State. The long-term fibre supply created by pine thinnings is the base for the potential biofuel advantage of the City.

Biomass based energy projects can be important job and skill creators in the region. As research in advanced biofuel production progresses, the City can partner with research centres to develop opportunities for these projects to occur at Mount Gambier. In addition, as advanced biomass based biofuel production is still in its infancy in Australia, Mount Gambier can seize the opportunity to be a first mover in this niche.

A report by McLennan Magasanik and Associates identifies the Limestone Coast as a clean energy 'hot spot' with the potential to create close to 500 jobs and generate $1.2 billion in spending.

Mount Gambier has access to gas supplies from the Otway Basin and the depleting Katnook fields. Gas is supplied through the South East Australia Gas (SEA Gas) gas pipeline from Port Campbell, the South East South Australia (SESA) pipeline (connecting the SEA Gas pipeline to gas facilities at Katnook/Ladbroke Grove) and the South East Pipeline System (SEPS), delivering gas from Katnook to Snuggery and Mount Gambier. Despite these gas resources and pipeline infrastructure, increasing gas prices are placing an increasing burden on energy intensive users in the region and potentially constraining future economic growth.

Action and implementation

- In partnership with RDA Limestone Coast and Invest SA, develop a pro-active investment attraction strategy to further increase investment in renewable energy projects in the region.
- Continue to actively participate and monitor developments in the State's energy policy, advocating for Mount Gambier's as a potential incubator and pilot site for new ventures in renewables, including battery storage.
- Facilitate partnerships between businesses, universities and research bodies for the commercialisation of new technologies and services in relation to advanced biofuels.

Partners

- Department of Primary Industries and Regions SA (PIRSA)
- Department of State Development
- Invest SA
- Australian Renewable Energy Agency (ARENA)
- Renewables SA
- Clean Energy Council
- Australian Geothermal Energy Association
- Biofuels Association of Australia
- Bioenergy Australia
- CSIRO
- Regional Development Australia Limestone Coast

ACTIONS FOR 2017-2020

1. **Provide leadership and support to the implementation of the *Tourism Mount Gambier Strategy.***
2. **Implement the *Digital Strategy and Action Plan* for the City of Mount Gambier to better promote tourism opportunities in Mount Gambier, develop content and connectivity with key domestic and international markets.**
3. **Continue to actively participate and monitor developments in the State's energy policy, advocating for Mount Gambier's as a potential incubator and pilot site for new ventures in renewables, including battery storage.**

4 INFRASTRUCTURE AND THE ROLE OF COUNCIL

The ‘human capital’ and ‘supporting businesses’ streams of the City Growth Strategy detailed in the preceding chapters are underpinned by two key enablers:

— Investment in infrastructure
— Role of Council in economic development.

The enablers are discussed in the sections below.

4.1 Investment in infrastructure

Objective

Increase investment in critical transport and economic infrastructure to support the growth of the City.

Background

Investment in economic infrastructure and securing a leverage position with respect to key infrastructure will be one of the important enablers for unlocking the economic development of Mount Gambier. This includes:

— Transport infrastructure: roads, Mount Gambier Airport and access to Port of Portland
— Utilities: water and energy infrastructure as well as broadband and waste facilities
— Tourism infrastructure
— Community infrastructure: including education and health facilities

Mount Gambier Airport is an important gateway to the City catering for over 76,000 Regular Public Transport passengers a year.

The Mount Gambier Airport is fully owned and operated by the District Council of Grant who have developed a three stage $12.2 million upgrade plan has been developed for the Airport including lengthening and strengthening the runway to cater for larger aircraft and support additional services and increased freight. The State Government has committed $4 million to the upgrade and The District Council of Grant have applied for Commonwealth Funding.

Action

Develop a *Mount Gambier Economic Development Fund* to invest in key economic development projects and infrastructure over the next 10 years.

Background

The City of Mount Gambier along with other Councils in South Australia as a whole, have a track record of conservative and prudent borrowing. While the ongoing financial sustainability of the City of Mount Gambier is paramount, there is potentially capacity, if required, to better leverage Council's asset base and balance sheet to raise finance for investment in key economic development projects and bringing forward the building of priority infrastructure projects.

Mount Gambier has physical assets of $230.4 million in 2015-16 and debt of $3 million. This represents less than 2 per cent of the book value; for South Australian Councils as a whole debt is around 3 per cent of total assets at book value.

The servicing costs of debt for the City of Mount Gambier represents around 1.4 per cent of income, which is extremely low by international standards and compares to around 2 per cent of income for South Australian Councils as a whole.

In addition, the City of Mount Gambier derives very little recurring commercial income directly from its asset base. Commercial revenue from sales of goods and services is also very low, in part because of the lack of scale for business investment.

As a consequence the City Council is very reliant on rate revenue, which accounts for 68 per cent of revenue base of the City of Mount Gambier, compared with 38 per cent for Councils across Australia.

Based on standard capital adequacy ratios in the commercial finance sector, for every $100 million invested in a financial institution, this can be leveraged to provide an additional $1 billion in lending capacity.

Accordingly, if the City of Mount Gambier were to borrow an additional $3 million against their asset pool for investment into an appropriate finance structure, they could access an additional $30 million in loans over time which can in turn be re-invested into targeted economic infrastructure and other investments.

While the Local Government Finance Authority, (LGFA) provides a valuable financing service to local government, the limited financing instruments and lack of aggregation of bankable investment projects limits private sector investment in local infrastructure developments across the State.

Action and implementation

— Undertake a detailed feasibility study into the options for developing a *Mount Gambier Economic Development Fund*, including the potential sources of funding, capacity to pay, any implications for rates and ongoing financial sustainability and broader economic benefits.

— Explore the opportunities to better leverage State and Commonwealth funding through the establishment of a *Mount Gambier Economic Development Fund*. The establishment of such a fund provides an opportunity to build a renewed partnership with State Government and strengthen the role and voice of Local Government in helping to facilitate economic development in partnership with the State.

Partners

— SA Minister for Local Government and Regional Development

— Office of Local Government SA, Department of Planning, Transport and Infrastructure (DPTI)

— Department of Treasury and Finance

— Local Government Financing Authority

4.2 Role of Council in economic development

Background

City Councils have an important role in facilitating economic development, despite their limited resources. This role has changed significantly in recent years and is likely to change markedly over the next 10 years. This is particularly the case in regional economies which are undergoing significant transition.

Mount Gambier's economy, as with South Australia's, is very much at the crossroads with significant challenges in terms of the transition of the economy, a rapidly changing workforce and global challenges impacting on the City and State. Offsetting this are growing opportunities through the growth in the service economy: tourism, education, health and from the knowledge based economy and the clean green environment.

The City of Mount Gambier, however, is under increasing pressure to respond to a range of difficult challenges – demand for services are increasing, grant revenues are declining, and it is in this context that the Council will need to assess its role in facilitating economic development.

The Council has made a significant contribution to the development of the City in recent years and laid strong foundations for growth. However, given the rapidly changing economy, it is likely that the Council will need to play an increasingly important role in economic development in the future, which will require a rethink of existing governance, functions and responsibilities.

From an economic development point of view the City of Mount Gambier plays an important role in five key areas:

— **Leadership:** while many of the levers for economic growth are held by industry and other stakeholders, the Council has a crucial role in providing leadership by setting strategic directions and establishing the appropriate policy framework, through advocacy and engagement both nationally and internationally, and facilitating and brokering investment.

— **Provision of services and infrastructure**: by providing targeted services that support business and the provision of key economic and community infrastructure including roads, waste and other facilities. The nature of these services and infrastructure is changing overtime with the Council playing a greater role in facilitating "smart" infrastructure that supports community services and economic development.

The City Council in the future can also play an important role by leveraging its balance sheet to invest in economic development initiatives and infrastructure and by using its purchasing power to support business growth.

— **Planning and regulation**. A key role for Council has been to provide the appropriate regulatory framework for business and provide a planning system which facilitates economic growth while also balancing environmental and other objectives.

Going forward it will be increasingly important to focus on positioning the City as one of the most attractive places to do business by reducing "red tape" and having a planning system that encourages innovation and increases the competitiveness and attractiveness of the City as a place to invest.

— **Capacity and capability building**: the Council is increasingly involved in building capacity and capability within the community and this will be an area of increased focus in areas such as human capital development, population growth, supporting the ageing of the population, encouraging innovation and entrepreneurship.

— **Promotion**: the Council invests heavily in the promotion of the City through events, marketing and increasingly through investment attraction and tourism promotion activities.

Action

The Council should develop a comprehensive and targeted China, India and ASEAN engagement strategy with the community, business, tourism and education sectors aimed at increasing trade, migration, investment and bilateral relations in culture and the arts.

— The value of South Australia's exports to China and India has increased by over 920 per cent in the last ten years.

— China is now South Australia's largest export market with an export value of $2.2 billion (in the 12 months to March 2017).

— South Australia's exports to the ASEAN region has increased by 220 per cent over the same period.

Over the ten year timeframe of the City Growth Strategy:

— Chinese visitors to Australia will increase significantly accounting for 43 per cent of the growth in arrivals and 60 per cent of the growth in visitor expenditure according to Austrade.

— Middle class consumers in the Asia-Pacific region will dominate consumer demand with an estimated 3.2 billion people in this segment by 2030.

The City of Mount Gambier has developed strong links with China and there is an opportunity to further build on this effort and State Government initiatives, to identify specific initiatives and actions to increase international tourists, inward investment, migration and exports to China. This strategy should be expanded over time to also strengthen engagement with the emerging ASEAN markets and India.

ACTIONS FOR 2017-2020

1. **Develop a *Mount Gambier Economic Development Fund* to invest in key economic development projects and infrastructure over the next 10 years.**

2. **Develop a comprehensive and targeted China, India and ASEAN engagement strategy with the community, business, tourism and education sectors aimed at increasing trade, migration, investment and bilateral relations in culture and the arts.**

5

IMPLEMENTATION

5.1 Governance and implementation

The City of Mount Gambier by itself will not be able to fully implement the *City Growth Strategy*. Full implementation will require strong cooperation between key stakeholders to deliver on a shared economic development vision. This will involve collaboration between Local Councils in the Limestone Coast, Regional Development Australia the State and Commonwealth Government and other key stakeholders involved in education, tourism and economic development in the region.

The Limestone Coast Local Government Association provides a mechanism for collaboration across local government in the region and with State Government. Achieving the transformative change proposed in the City Growth Strategy will require strong leadership and high level collaboration between the key stakeholders, with a focus on a shared vision and implementation of specific action plan. The new City Deal arrangements brokered by the Commonwealth government involving local and state governments provides a good example of such arrangements (see Box 5.2).

5.2 Monitoring and evaluation

The City of Mount Gambier should also look to adopt a comprehensive monitoring and reporting framework to measure both the activity and inputs involved in implementing the actions under the strategy as well as outcomes. While a number of actions can be facilitated within existing resources, others will require the commitment of specific resources by Council and a priority will be securing the necessary commitment to be able to implement the *City Growth Strategy* over the next ten years.

The *City Growth Strategy* sets a number of headline targets in key areas, and it is recommended that the current process of quarterly performance reports to Council continue and as required incorporate Key Performance Indicators as identified in the City Growth Strategy.

BOX 5.2 CITY DEALS

The Commonwealth Government has established the City Deals program aimed at developing a partnership between the Commonwealth Government, State and local government as well as industry and communities to develop collective plans for growth and commit to actions, reforms and governance models needed to implement the plan.

The City Deals have recently been negotiated with the City of Townsville and City of Launceston and the Commonwealth is keen to include more regional cities in the program.

The Townsville City Deal involved a 15 year commitment between the three levels of Government to deliver transformative outcomes in terms of economic development and liveability for the City and its residents.

The Launceston City Deal involves a 5 year commitment by the three levels of government to deliver a plan focussed on (1) jobs and skills growth (2) business, industry and population growth (3) a vibrant and liveable city (4) innovation and industry engagement and (5) environmental outcomes.

The City Deals have the commitment and ultimate reporting to the Prime Minister, Premier and City Mayor with a Leadership Group comprising of an Assistant Minister, Deputy Premier and Mayor and oversight of the implementation through an Executive Board consisting of senior officials from Council, Commonwealth and State Government.

SOURCE: DEPARTMENT OF THE PRIME MINISTER AND CABINET

5.3 Action plan

The following table summarises key actions and provides an indication of the resources required to progress. Ten priority actions are highlighted for early consideration by Council.

BUILDING HUMAN CAPITAL		REF
Population Strategy		**Page 8**
Aim to increase the population of the City of Mount Gambier to 32,000 over the next ten years through an ambitious migration strategy for attracting skilled, business, humanitarian and inter and intrastate migrants, linked to emerging job and business opportunities.		
	Action	
1	Implement a comprehensive migration strategy with a focus on increasing inter-State, intra-State and overseas migration	Page 10
(a)	Implement an overseas migration strategy including business, skilled and humanitarian migration with the aim of increasing overseas migration by 110-120 per annum.	
(d)	Humanitarian migration: build on the very successful humanitarian and refugee migration to the region and promote the City's strong multicultural base.	
(c)	Undertake a domestic migration campaign with the aim of increasing inter and intra-state migration by 200-250 per annum.	
2	Investigate with the South Australian Government the opportunity to increase public sector employment in the City of Mount Gambier by 500 people over the next ten years.	Page 11
Leveraging opportunities from the ageing of the population		**Page 12**
Position Mount Gambier as a leading City in terms of supporting mature workers and providing facilities and services for the aged with the aim of creating an extra 1,200 jobs in the health and aged care sector by 2027.		Page 12
3	Increase opportunities through Adult and Community Education, TAFE SA and the University of SA for the upskilling of mature age workers to meet the changing skill needs in the region, including provision of short courses in relation to new technologies and health related services.	Page 13

4	In consultation with the health and aged care sector determine future needs and identify potential barriers and facilitators of growth including ensuring the supply of appropriately zoned land and other infrastructure and services to maximise growth potential of the health and aged care sector and investment in the sector in Mount Gambier.	Page 13
5	Develop with the private sector new models of urban design under a Smart Cities program which allows older people to live independently at home longer through the provision of services and smart infrastructure and assistive technology.	Page 13
Education		**Page 14**
Work with State Government, industry, education sector and the community to enhance skills and education outcomes and increase the attainment of higher education qualifications by local students from 10.9 per cent of population to 16 per cent by 2027.		
6	The City of Mount Gambier lead an Outcomes Based Accountability change process with key stakeholders to improve school and tertiary education outcomes in the City, this would include: – gaining commitment and buy-in from key stakeholders at the highest level (including families and community) to implement change in education outcomes in the City – clarifying the education outcomes that the community wants to address and choose clear indicators to measure the baseline and progress – develop an action plan and lead a process to *Turn the Curve* on education outcomes in Mount Gambier supported by clear and regular reporting ensuring clear accountability for the implementation of actions.	Page 15

SUPPORTING BUSINESS		
Supporting local business		**Page 17**
Engage and work closely with existing businesses to better understand their challenges and opportunities and help them grow and increase employment.		
7	Work with the RDA Limestone Coast in undertaking a skills profile of existing businesses and map the future skill needs for key growth sectors and develop a comprehensive workforce development plan to address the training, upskilling and future workforce development needs to support future growth in key sectors, this plan will also help underpin the skilled migration strategy.	Page 17
8	Work with business, government and universities to strengthen the connections between existing businesses and universities and better access existing programs such as Innovation Vouchers and other supports for collaboration and innovation.	Page 17
9	Undertake a comprehensive review of “red-tape” and regulation on business in the City and, where appropriate, look to reduce the regulatory impact and cost of doing business in Mount Gambier	Page 17
Increasing support for start-up businesses		**Page 18**
In partnership with State and Commonwealth Government and Universities, develop a sustainable entrepreneurship ecosystem in Mount Gambier through the establishment of the *Mount Gambier Business Hub* to support the growth of start-up businesses in the City.		
10	Undertake a detailed feasibility study on the costs, funding and business model for the establishment of a *Mount Gambier Business Hub* and where possible leverage off State and Commonwealth support and services provided by Universities.	Page 18
11	Provide dedicated office space and fit out for the establishment of a business incubator and co-working space for start-up businesses and seek expressions of interest from the private sector for the operation of the facility on a commercial basis over time.	Page 19

Promotion and investment attraction		Page 20
To undertake a series of targeted campaigns over the next three years to better promote within Australia and overseas the City's and the region's competitive strengths, clean and green credentials, liveability and investment opportunities.		
12	Develop a comprehensive marketing campaign including prospectuses and materials that promotes the many competitive strengths of the City and opportunities for business, migration, tourism and future investment.	Page 20
13	Undertake a targeted digital and online campaign that underpins the migration strategy to promote the affordability of housing and quality lifestyle to both young families and mature age workers through a targeted	Page 20
14	Better promote and market the many successful small, medium and large scale businesses that operate nationally and internationally from Mount Gambier to help underpin the attraction of new businesses and migrants to the region.	Page 20
Tourism		**Page 21**
Support the tourism sector and stakeholders through marketing, promotion, international engagement and provision of infrastructure to position Mount Gambier as a significant tourism destination in Australia, with the aim of doubling the number of tourists within a decade.		
15	In partnership with local wine and tourism bodies develop a marketing campaign to promote the regions food and wine tourism and be in a position to leverage funds through the Commonwealth Government's proposed $50 million *Export and Regional Wine Support Package.*	Page 22
16	Enhance the facilities, services and infrastructure that supports visitation to the Blue Lake and work with the arts sector to sponsor and develop an iconic event/performance focussed on increasing visitation to the Blue Lake and City.	Page 22
17	Provide leadership and support to the implementation of the *Tourism Mount Gambier Strategy.*	Page 22
18	Implement the *Digital Strategy and Action Plan* for the City of Mount Gambier to better promote tourism opportunities in Mount Gambier, develop content and connectivity with key domestic and international markets.	Page 22
Agribusiness and clean green economy		**Page 23**
Promote the City as a prime location for regional headquarters to exploit the region's abundant renewable resources, and spearhead innovation in advanced biofuels production based on timber products. Aim to increase local income by $1 billion over the next decade from investment and expenditure in new renewable projects.		
19	In partnership with RDA Limestone Coast and Invest SA develop a pro-active investment attraction strategy to further increase investment in renewable energy projects in the region.	Page 24
20	Continue to actively participate and monitor developments in the State's energy policy, advocating for Mount Gambier's as a potential incubator and pilot site for new ventures in renewables, including battery storage.	Page 24
21	Facilitate partnerships between businesses, universities and research bodies for the commercialisation of new technologies and services in relation to advanced biofuels.	Page 24

INFRASTRUCTURE AND THE ROLE OF COUNCIL		
Investment in infrastructure		**Page 25**
Increase investment in critical transport and economic infrastructure to support the growth of the City.		
22	Develop a *Mount Gambier Economic Development Fund* to invest in key economic development projects and infrastructure over the next 10 years.	Page 25

Role of Council in economic development		Page 27
The Council will need to play an increasingly important role in economic development in the future which will require a redesign of existing governance arrangements, functions and responsibilities.		
23	The City of Mount Gambier should adopt a comprehensive monitoring and reporting framework to measure both the activity and inputs involved in implementing actions under the *City Growth Strategy* and the current process of quarterly performance reports to Council continue and as required incorporate Key Performance Indicators as identified in the City Growth Strategy.	Page 29
24	Develop a comprehensive and targeted China, India and ASEAN engagement strategy with the community, business, tourism and education sectors aimed at increasing trade, migration, investment and bilateral relations in culture and the arts.	Page 28

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Limestone Coast region
Economic impact model

Economic impact modelling enables the Limestone Coast region to explore how change in employment or output(sales) in one sector of the local economy will impact on all other sectors of the economy, by modelling the flow-on effects across different industries.
This provides the Limestone Coast region with powerful evidence to advocate against industrial closures or strategically target new industry sectors which are likely to have the greatest positive economic impact.
Different industries will have different flow on effects. Adding jobs in a particular sector will not only add to the value of that sector, but also to other industries related to the supply chain (eg. suppliers, wholesalers) and service industries (retail, food services, administration) which will expand to service the additional workforce. Jobs in associated industries may be added in the local area or outside it, based on journey to work information.
The economic impacts are calculated using an input-output model which is derived from the local economy microsimulation model by National Economics (NIEIR).
To use the model, simply input the number of jobs (per year) to be added to (+) or removed (-) from the economy in a particular industry sector. The results show the theoretical addition (or loss) to the local economy of jobs and value added by industry sector. It also shows the proportion of the new employment that would occur inside and outside the Limestone Coast region.

Industry: Building Construction
Impact modeled: ADDITION of $40.0 million sales
Company name: Sport and Recreation Centre

Impact Summary

Limestone Coast region - Modelling the effect of adding $40.0m sales in Building Construction - Inflation adjusted

Summary	Output ($m)	Value-added ($m)	Local jobs	Residents jobs
Starting position Limestone Coast region (year ended June 2016)	--	--	--	--
Building Construction	202.59	41.62	613	630
All industries	6,456.13	3,033.63	30,100	31,198
Impacts on Limestone Coast region economy	--	--	--	--
Direct impact on Building Construction sector	40.00	8.22	121	--
Industrial impact	36.94	13.44	149	--
Consumption impact	6.07	2.64	36	--
Total impact on Limestone Coast region economy	**83.01**	**24.30**	**306**	**302**
▪ Type 1 multiplier (direct & industrial)	1.92	2.64	2.23	--
Type 2 multiplier (direct, industrial & consumption)	2.08	2.96	2.53	--
Impact on Australian economy	--	--	--	--
Total impact outside Limestone Coast region	33.57	14.11	109	115
Total impact on Australian economy	**116.59**	**38.41**	**415**	**416**

Source: National Institute of Economic and Industry Research (NIEIR) ©2016. Compiled and presented in economy.id by .id , the population experts.
Note: All $ values are expressed in 2014-15 base year dollar terms.

Impact on Output

The direct addition of $40.0 million annual output in the Building Construction sector of the Limestone Coast region economy would lead to an increase in indirect demand for intermediate goods and services across related industry sectors. These indirect industrial impacts (Type 1) are estimated to be an additional $36.94m in Output, representing a Type 1 Output multiplier of 1.92.

There would be an additional contribution to the Limestone Coast region economy through consumption effects as correspondingly more wages and salaries are spent in the local economy. It is estimated that this would result in a further increase in Output of $6.07m .

The combination of all direct, industrial and consumption effects would result in total estimated rise in Output of $83.01m in the Limestone Coast region economy, representing a Type 2 Output multiplier of 2.08.

These impacts would not be limited to the local economy. Industrial and consumption effects would flow outside the region to the wider Australian economy to the tune of $33.57m in Output.

The combined effect of economic multipliers in the Limestone Coast region and the wider Australian economy is estimated to be $116.59m added to Australia's Output.

Impact on Local Employment (jobs)

The direct addition of $40.0 million annual output in the Building Construction sector of the Limestone Coast region economy is estimated to lead to a corresponding direct addition of 121 jobs in the local Building Construction sector. From this direct expansion in the economy it is anticipated that there would be flow on effects into other related intermediate industries, creating an additional 149 jobs. This represents a Type 1 Employment multiplier of 2.23.

This addition of jobs in the local economy would lead to a corresponding increase in wages and salaries, a proportion of which would be spent on local goods and services, creating a further 36 jobs through consumption impacts.

The combination of all direct, industrial and consumption effects would result in a total estimated increase of 306 jobs located in the Limestone Coast region. This represents a Type 2 Employment multiplier of 2.53.

Employment impacts would not be limited to the local economy. Industrial and consumption effects would flow outside the region to the wider Australian economy creating a further 109 jobs.

The combined effect of economic multipliers in the Limestone Coast region and the wider Australian economy is estimated to be an addition of 415 jobs.

Impact on value added

The direct addition of $40.0 million annual output in the Building Construction sector of the Limestone Coast region economy would lead to a corresponding direct increase in value added of $8.22m. A further $13.44m in value added would be generated from related intermediate industries. These indirect industrial impacts represent a Type 1 value added multiplier of 2.64.

There would be an additional contribution to the Limestone Coast region economy through consumption effects as correspondingly more wages and salaries are spent in the local economy. It is estimated that this would result in a further increase in value added of $2.64m.

The combination of all direct, industrial and consumption effects would result in an estimated addition in value added of $24.30m in the Limestone Coast region economy, representing a Type 2 value added multiplier of 2.96.

These impacts would not be limited to the local economy. Industrial and consumption effects would flow outside the region to the wider Australian economy to the tune of $14.11m in value added.

The combined effect of economic multipliers in the Limestone Coast region and the wider Australian economy is estimated to be $38.41m added to Australia's value added.

Impact on GRP

Value added by industry represents the industry component of Gross Regional Product(GRP). The impact on the Limestone Coast region's GRP as a result of this change to the economy is directly equivalent to the change in value added outlined in the section above.

In summary, GRP in the Limestone Coast region is estimated to increase by $24.30m.

The effect on the Australian economy (including Limestone Coast region) is estimated to be a growth in Gross Domestic Product(GDP) of $38.41m.

Impact on employment by industry sector

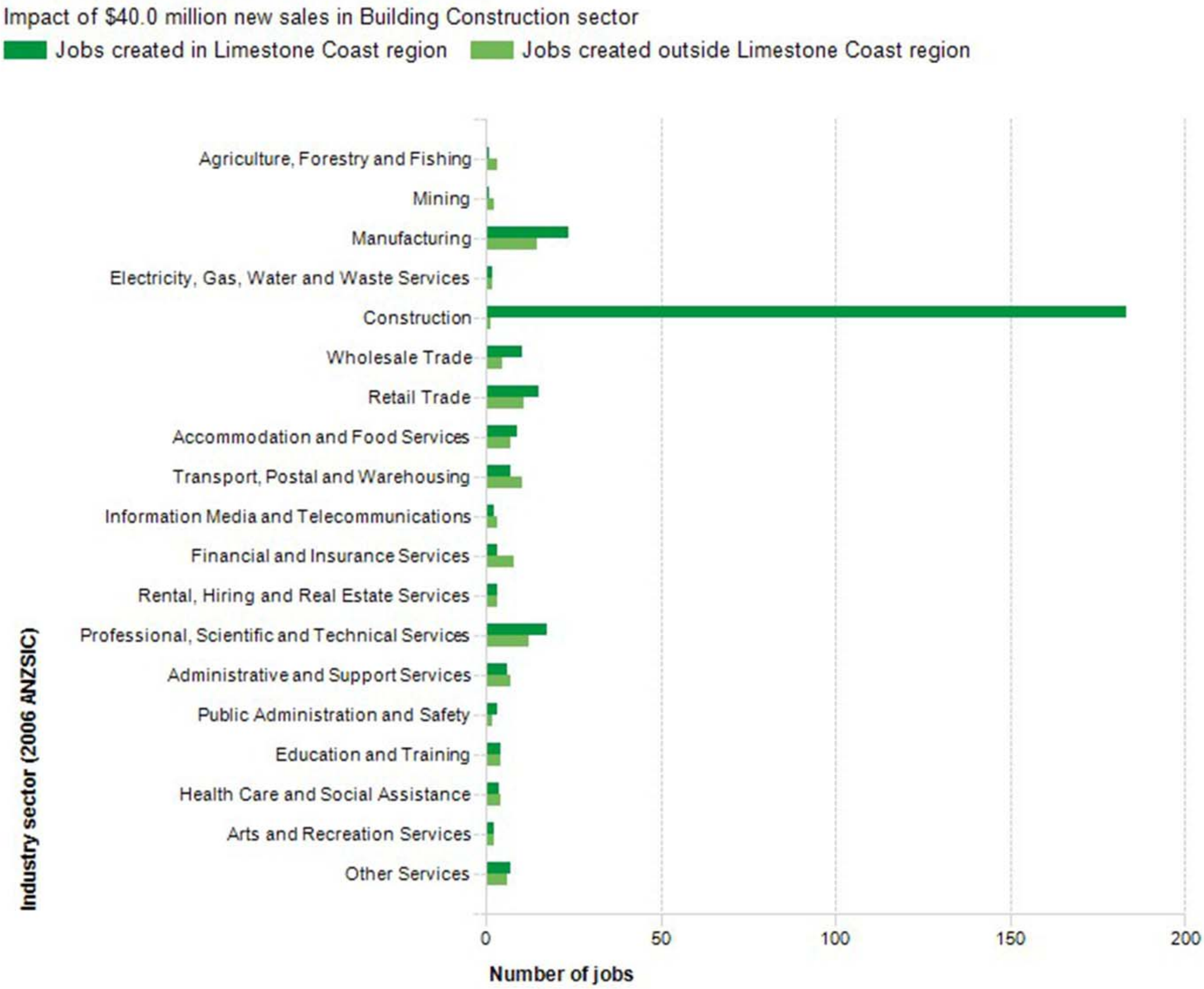
This table shows a detailed breakdown of how employment will be affected by the addition of $40.0 million annual output in the Building Construction sector of the Limestone Coast region economy. This includes both the direct industrial impact (Type 1) and ongoing consumption impact (Type 2).

Employment by industry sector

Limestone Coast region - Impact of $40.0 million new sales in 'Building Construction' output (Type 1 & 2 combined impact)	Employment impacts			
Industry sectors (1-digit ANSIC)	Existing jobs in the Limestone Coast region*	Jobs created in the Limestone Coast region	Jobs created outside of the Limestone Coast region	Jobs created for Limestone Coast region residents
Agriculture, Forestry and Fishing	5,534	1	3	1
Mining	58	1	2	1
Manufacturing	4,109	24	15	24
Electricity, Gas, Water and Waste Services	257	2	2	2
Construction	1,934	183	1	180
Wholesale Trade	1,026	10	5	10
Retail Trade	3,806	15	11	15
Accommodation and Food Services	2,044	9	7	9
Transport, Postal and Warehousing	1,140	7	10	7
Information Media and Telecommunications	273	3	3	3
Financial and Insurance Services	488	3	8	3
Rental, Hiring and Real Estate Services	317	3	3	3
Professional, Scientific and Technical Services	719	18	12	17
Administrative and Support Services	784	6	7	6
Public Administration and Safety	1,103	3	2	3
Education and Training	2,036	4	4	4
Health Care and Social Assistance	3,037	4	4	4
Arts and Recreation Services	226	2	2	2
Other Services	1,211	7	6	7
Total Industries	30,100	306	109	302

Source: National Institute of Economic and Industry Research (NIEIR) ©2016. Compiled and presented in economy.id by .id The population experts

Employment by industry sector



Source: National Institute of Economic and Industry Research (NIEIR) ©2016
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Resident employment impacts

The combination of all direct, industrial and consumption effects of adding $40.0 million annual output to the Building Construction sector of the Limestone Coast region economy would be an estimated increase of 302 jobs located in the Limestone Coast region and 115 jobs located outside the Limestone Coast region – a total of 416 jobs.

As some of the Limestone Coast region's residents leave the area to work and residents of other areas enter the Limestone Coast region to work, not all of these jobs will be filled by Limestone Coast region residents. It is estimated that of the 416 jobs created, 302 or 72.5% would be expected to be filled by Limestone Coast region residents.

Industry employment impacts

The combination of all direct, industrial and consumption effects of adding $40.0 million annual output to the Building Construction sector of the Limestone Coast region economy would result in an estimated increase of 306 jobs located in the Limestone Coast region.

Of the 306 jobs created within the Limestone Coast region, 183, or 59.8% would be added within Construction the sector. This includes the direct jobs created in the sector, and the effect of flow-on jobs within the same sector. The largest increase in jobs outside Construction would be in Manufacturing (24), Professional, Scientific and Technical Services (18) and Retail Trade (15).

A total of 109 jobs are estimated to be created outside the Limestone Coast region, with the largest number being in Manufacturing (15) Professional, Scientific and Technical Services (12) and Retail Trade (11).

Impact on value added by industry sector

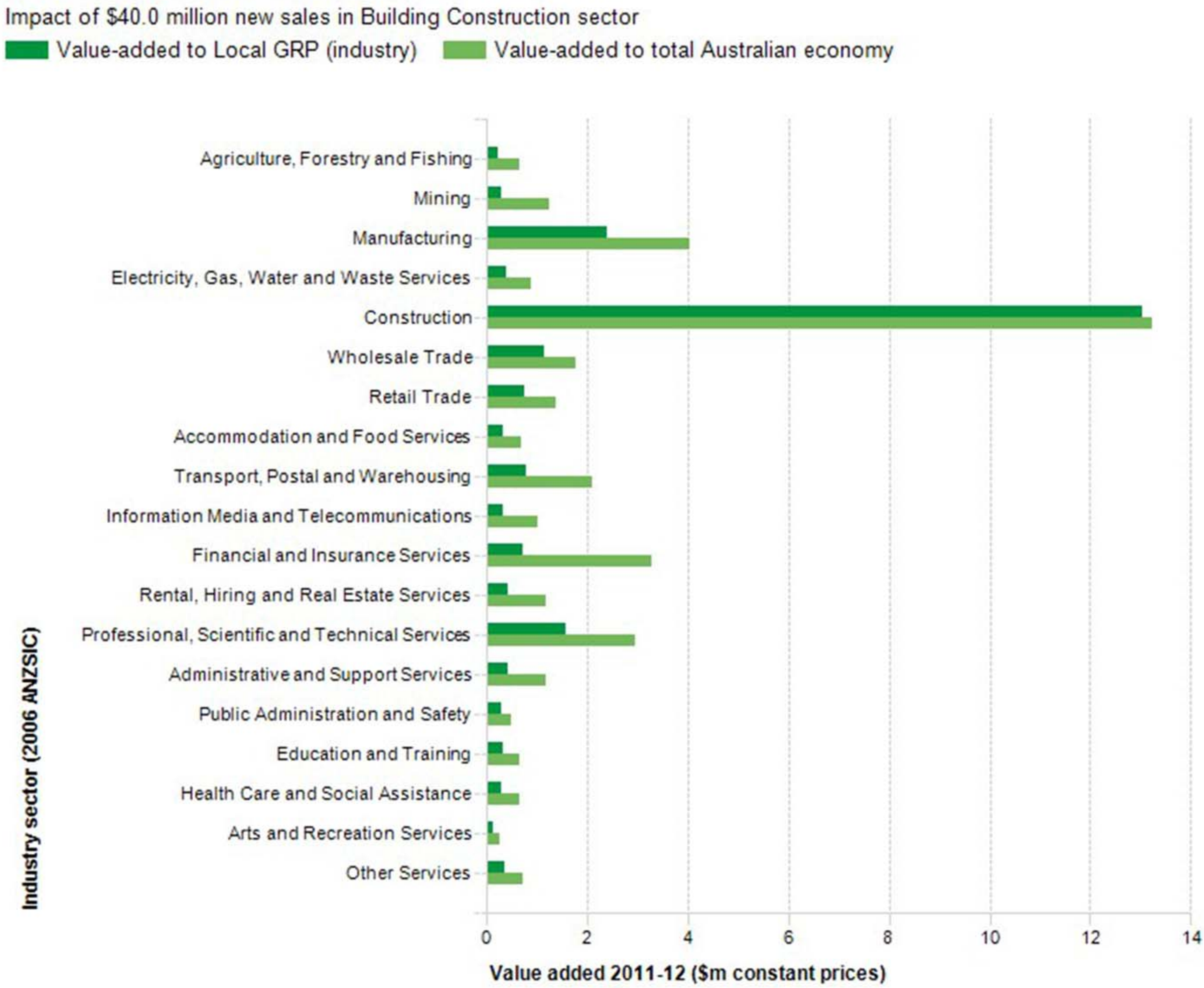
This table shows a detailed breakdown of how adding $40.0 million annual output in the Building Construction sector of the Limestone Coast region economy will impact on the value added of each industry sector. This highlights the relationships between industry. This includes both the direct industrial impact (Type 1) and ongoing consumption impact (Type 2).

Value-added by industry

Limestone Coast region - Impact of $40.0 million new sales in 'Building Construction' output (Type 1 & 2 combined impact)	Value added 2013-14 ($m constant prices)		
Industry sectors (1-digit ANSIC)	**Value-added to the Limestone Coast region**	**Percentage change**	**Value-added to Australian economy**
Agriculture, Forestry and Fishing	$0.22	0.0%	$0.65
Mining	$0.31	1.6%	$1.25
Manufacturing	$2.41	0.6%	$4.04
Electricity, Gas, Water and Waste Services	$0.38	0.7%	$0.88
Construction	$13.05	8.1%	$13.23
Wholesale Trade	$1.16	0.9%	$1.76
Retail Trade	$0.76	0.4%	$1.38
Accommodation and Food Services	$0.34	0.4%	$0.68
Transport, Postal and Warehousing	$0.79	0.7%	$2.09
Information Media and Telecommunications	$0.32	1.1%	$1.03
Financial and Insurance Services	$0.73	0.5%	$3.27
Rental, Hiring and Real Estate Services	$0.44	0.9%	$1.17
Professional, Scientific and Technical Services	$1.57	2.5%	$2.96
Administrative and Support Services	$0.42	0.7%	$1.17
Public Administration and Safety	$0.29	0.3%	$0.51
Education and Training	$0.33	0.2%	$0.66
Health Care and Social Assistance	$0.29	0.1%	$0.66
Arts and Recreation Services	$0.13	0.8%	$0.27
Other Services	$0.37	0.6%	$0.74
Total Industries	$24.30	0.8%	$38.40

Source: National Institute of Economic and Industry Research (NIEIR) ©2016. Compiled and presented in economy.id by .id The population experts

Value-added by industry



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The combination of all direct, industrial and consumption effects of adding $40.0 million annual output to the Building Construction sector of the Limestone Coast region economy would result in an estimated increase in value added of $24.30m in the Limestone Coast region economy.

The Construction sector of the economy is estimated to increase in value added by 8.1%, with the total Limestone Coast region economy estimated to grow by 0.8%.

The main impacts in value added within Limestone Coast region, outside of Construction, are in Manufacturing (2.41m), Professional, Scientific and Technical Services (1.57m) and Wholesale Trade (1.16m).

Impact Summary

Limestone Coast region - Modelling the effect of adding 21 jobs in Sports and Recreation Activities - Inflation adjusted				
Summary	**Output ($m)**	**Value-added ($m)**	**Local jobs**	**Residents jobs**
Starting position Limestone Coast region (year ended June 2016)				
Sports and Recreation Activities	17.68	8.66	137	155
All industries	6,456.13	3,033.63	30,100	31,198
Impacts on Limestone Coast region economy				
Direct impact on Sports and Recreation Activities sector	2.70	1.32	21	
Industrial impact	1.42	0.67	8	
Consumption impact	0.43	0.20	3	
Total impact on Limestone Coast region economy	4.56	2.19	32	31
Type 1 multiplier (direct & industrial)	1.53	1.51	1	
Type 2 multiplier (direct, industrial & consumption)	1.69	1.66	2	
Impact on Australian economy				
Total impact outside Limestone Coast region	2.52	1.02	9	9
Total impact on Australian economy	7.07	3.22	40	40

Source: National Institute of Economic and Industry Research (NIEIR) ©2016. Compiled and presented in economy.id by .id , the population experts.
Note: All $ values are expressed in 2014-15 base year dollar terms.

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City of Mount Gambier

Economic Score Card Snapshot

City of
Mount Gambier

Economic Profile

11,000

Total jobs in in the City of Mount Gambier in 2014/15.

The top five contributors to employment were:

1. Health care and social assistance
2. Retail trade
3. Manufacturing
4. Education and training
5. Agriculture, forestry and fishing

1.5%

Of total state employment (approx).

Economic Structure of the Regional Economy

RANK	EMPLOYMENT		GROSS REGIONAL PRODUCT*		HOUSEHOLD INCOME	
1	**Health Care**	**19%**	**AgForFish**	**19%**	**Health Care**	**17%**
2	**Retail Trade**	**14%**	**Manufacturing**	**10%**	**Manufacturing**	**14%**
3	**Manufacturing**	**13%**	**Health Care**	**10%**	**Construction**	**11%**
4	**Education**	**10%**	**Construction**	**7%**	**Education**	**10%**
5	**AgForFish**	**8%**	**O'ship Dwellings**	**7%**	**AgForFish**	**10%**
6	Construction	7%	Retail Trade	7%	Retail Trade	8%
7	AccomFoodServ	6%	Education	7%	PublicAdmin	6%
8	PublicAdmin	5%	W'sale Trade	5%	W'sale Trade	6%
9	Other Services	4%	Finance	5%	ProfScTechServ	4%
10	ProfScTechServ	4%	PublicAdmin	4%	Other Services	3%
	Other Sectors	10%	Other Sectors	20%	Other Sectors	12%
TOTAL	11,147 (TOTAL JOBS)	100%	1,126 ($M)	100%	726 ($M)	100%
SHARE OF LIMESTONE COAST	35.2%		37.3%		37.1%	
SHARE OF SOUTH AUSTRALIA	1.5%		1.3%		1.2%	

*Gross regional product (GRP) is regional income measured broadly as the sum of wages & salaries (to workers) and profits (to business owners). GRP is the regional equivalent of gross domestic product (GDP).

Demographic Profile

26,348

Estimated resident population in the City of Mount Gambier in 2014/15.

1.6%

Of total state population (1.70M).

Compared to the state, the City of Mount Gambier has:

+ larger than average concentration of people 0–14 years (2.5% higher)

< slightly smaller than average concetration of people 15–64 years (2.2% lower)

= similar proportion of people aged 65 + (0.3% lower).

Based on the Planning SA projections, the population in the City of Mount Gambier will increase by about 12.0% over the 20 years from 2011 (Census year) whereas the total SA population is expected to increase by around 18.1%. Over the same period, the number of people aged 65+ is projected to grow from 3,960 to 6,710, a 69.5% increase.

Labour Force and Business Count Indicators

Estimated unemployment rate in 2016 (four quarter average).

5.7%

Unemployment decreased from 6.7% in 2010 (4 quarter average).

The unemployment rate fluctuated around that of SA but was lower through 2016 (SA = 6.8%, four quarter average).

Youth unemployment fluctuated between 2010 and 2015, peaking at 21.9% in March 2015.

12.1%

Estimated youth unemployment rate in December 2015.

The youth unemployment rate fluctuated around that of SA (15.3% in Dec 2015), but was generally higher.

The most significant industries in regards to counts of registered business were the:

Construction Sector (16%)

Agriculture, Forestry and Fishing Sector (14%)

The only large businesses (200+ employing) registered in the region were in the transport, postal and warehousing sector.

Tourism Expenditure and Impact Assessment of Extended Stay from Visitors

272,000

overnight visitors to the City of Mount Gambier in 2014/15.

$71.4M

estimated impact of tourism on total contribution to GRP during 2014/15.

$15.1M

Under a scenario where all overnight visitors stayed an extra night, approximately $15.1M of additional GRP would be generated.

Tourism generated an estimated 779 fte jobs in 2014/15, 7.3% of total employment in the City of Mount Gambier.

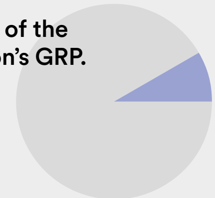
An extra night's stay by overnight visitors would generate an additional 145 fte jobs.

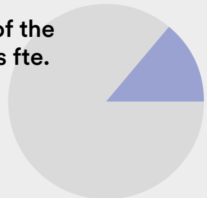
Household income generated by tourism in the City of Mount Gambier was estimated to be almost $39M in 2014/15, 5.3% of the City's total.

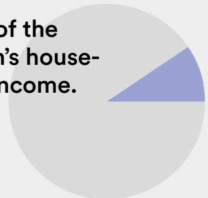
The household income impact an extra night's stay by overnight visitors was estimated to be $7.2M.

Retail Sector Contribution to the Regional Economy

GRP	EMPLOYMENT	HOUSEHOLD INCOME
$106.5M approximate GRP in the City of Mount Gambier attributable to the retail sector.	**1490 fte** approximate contribution of the retail sector.	**$68.9M** approximate household income attributed to the retail sector.
$26.8M of this related to large scale retailers.	**376 fte** related to large scale retailers.	**$17.4M** related to large scale retailers.
8.4% of the region's GRP.	13.9% of the region's fte.	9.5% of the region's household income.







Impact Assessment for the Generations in Jazz Festival

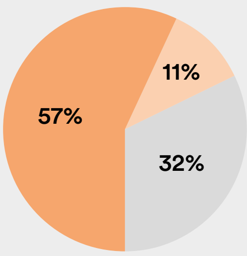
GRP

$4.3M

approximate GRP contribution attributed to the Festival.

Direct impact	Flow-on impact
$1.5M	$2.8M

Total GRP impact:



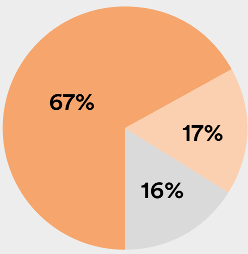
EMPLOYMENT

31fte

approximate employment impact attributed to the Festival.

Direct impact	Flow-on impact
13	18

Total employment impact:



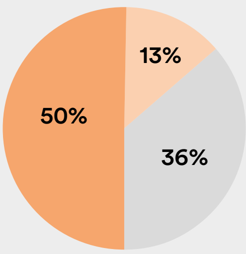
HOUSEHOLD INCOME

$2.3M

approximate household income contribution attributed to the Festival.

Direct impact	Flow-on impact
$0.7M	$1.6M

Total household income impact:



- City of Mount Gambier
- Rest of the Limestone Coast
- Rest of the State