

2020 Strategic Plan | REGIONAL DEVELOPMENT AUSTRALIA MURRAYLANDS & RIVERLAND



Regional
Development
Australia
MURRAYLANDS & RIVERLAND INC.
SOUTH AUSTRALIA

Our Vision: A vibrant resilient region that capitalises on change, embraces economic development and prosperity, and provides an inspirational living, investment and working environment.

Critical Success Factors to achieve the Vision

-  **1** WATER AND ENERGY SECURITY
-  **2** CAPABILITY OF OUR COMMERCIAL, COMMUNITY AND GOVERNMENT ORGANISATIONS IN THE REGION
-  **3** 'WHOLE OF REGION' APPROACH TO BUILDING THE FOUNDATIONS FOR A VIBRANT AND RESILIENT ECONOMY

The three Strategic Directives we will pursue over the next ten years to begin addressing those critical success factors to advance our Vision:

- EXTEND OUR LEAD IN PRIMARY PRODUCTION AND LEVERAGE IT INTO OTHER SECTORS**
- CAPABILITY OF OUR COMMERCIAL, COMMUNITY AND GOVERNMENT ORGANISATIONS IN THE REGION**
- BUILD A SINGLE IDENTITY THAT UNITES THE REGION**

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Message from the Chair



Regional Development Australia Murraylands & Riverland Inc (RDAMR) is the primary economic development agency for the Murraylands and Riverland region that is home to some 70,600 people and over 6,100 businesses, and generates an economic output of \$3.6 billion per annum.

Our region operates within the context of the State economy of South Australia, led by metropolitan Adelaide which accounts for 71% of the State's population (1.1 million people) and 73% of its Gross State Product (some \$70 billion per annum).

The Murraylands and Riverland is one of the eight regions that makes up the rest of the state economy, vying for a share of the remaining 29% of the population and 27% of Gross State Product.

Each of the eight regional economies share similar economic composition, and are trying to achieve similar results – grow business investment and grow population. We each have Visions for our region, and have created our regional economic strategies and plans to improve our position in the economic hierarchy of the State.

To significantly make a difference to our economic future in the Murraylands and Riverland and progress our Vision we must differentiate ourselves, and demonstrate to prospective businesses and residents that the opportunities within our region are unique. In this context we have developed our Strategic Plan 2020 with a focus on our competitive advantages and key points of difference, which are many. For the businesses and residents that make up our community, this Strategic Plan highlights the benefits our region offers now, and how we will build on current strengths to make our region even better.

We invite all of the Murraylands and Riverland community to embrace this Strategic Plan and work with us to secure a strong and prosperous future for our region.

A handwritten signature in cursive script that reads "Neil Martinson".

Neil Martinson
Chair, RDAMR

1. About the Strategic Plan

This Strategic Plan is designed to provide direction for businesses, government and community groups to align their priorities and efforts to gain better economic and social outcomes for everyone in our region.

To guide our efforts we have established a Vision for *“a vibrant, resilient region that capitalises on change, embraces economic development and prosperity, and provides an inspirational living, investment and working environment”*.

We have identified three critical success factors that our region needs to address to fully deliver on this Vision:

-  **1 WATER AND ENERGY SECURITY**
-  **2 CAPABILITY OF OUR COMMERCIAL, COMMUNITY AND GOVERNMENT ORGANISATIONS IN THE REGION**
-  **3 ‘WHOLE OF REGION’ APPROACH TO BUILDING THE FOUNDATIONS FOR A VIBRANT AND RESILIENT ECONOMY**

The Strategic Plan will take a focused approach to these critical success factors by establishing priorities and initiatives to grow our primary production lead, improve our water and energy security, and nurture value adding activities.

Supporting our region’s organisations and people to achieve their potential will include embarking on a deliberate and strategic capability development journey, and formalising a clear, strong identity for the region that all our commercial and social organisations can contribute to, and that entices new businesses and residents to be part of.

The Strategic Plan has been prepared for two main audiences:

- 1) businesses large, small and just starting out either operating in the region or looking to looking to come to the region; and
- 2) current and prospective residents with an interest and investment in the quality of life provided by the region into the future.

Community groups, government agencies and interested citizens are also important regional partners who can benefit from and contribute to implementation of the Strategic Plan.

We invite all the region’s stakeholders to join us in our commitment to the Strategic Plan and the priorities and strategies it sets out in pursuit of our Vision. At the same time, we are open to feedback on progress as the Strategic Plan is implemented, and ideas to improve and enhance our approach in the future.



2. The Role of the RDAMR

Regional Development Australia Murraylands and Riverland (RDAMR) is a not for profit organisation that acts as a conduit between all levels of government and the Murraylands and Riverland community to optimise the economic future of our region.

Our role is to facilitate the efforts of all levels of government and the Murraylands and Riverland business and residential communities to maximise economic opportunities.

Our long term Vision (see Section 4 of this Strategic Plan) for the region encapsulates the economic and social goals we believe will best serve the region.

To fulfil our role we will deliver advocacy, facilitation and funded services to work closely with our stakeholders in government, industry, not for profits and community groups working in our region.

Building alliances with many of the other organisations who are also seeking to improve the economic and social outcomes for the region will be a key factor in how effectively and efficiently we can progress our Vision.

OUR PARTNERS

Maximising the impact of those efforts that will make the most difference to the lives and businesses of people in our region is a shared focus amongst a number of organisations.

To achieve greater resource effectiveness and efficiency we will work closely with those other leadership organisations to achieve the best for our region. These include:

- ▶ our eight local council partners and the Murraylands and Riverland Local Government Association
- ▶ community groups
- ▶ federal government agencies
- ▶ State government agencies such as:
 - ▶ Department of Primary Industries
 - ▶ Department of State Development and Regions
 - ▶ Department of Planning, Transport and Infrastructure
 - ▶ Department for Environment, Water and Natural Resources
 - ▶ South Australian Tourism Commission

3. Snapshot of our region

The Murraylands and Riverland covers over 36,000 square kilometres, spanning eight local councils. By area it is the third largest RDA region in South Australia.

Geographically the Murraylands and Riverland sits between Adelaide metropolitan area to the west and the Victorian border to the east. We are fortunate to have such a large expanse of the Murray River running through our region from Renmark in the north through to Murray Bridge and the Coorong in the South.

The region is home to around 70,633 people and some 6,120 businesses. The major economic output is primary production accounting for 34% of all GRP generated, 20% of jobs and 15% of household incomes. Our region has the highest proportion of agriculture dependence of any RDA region in South Australia.

The following discussion of our strengths and competitive advantages as a region is based on our [Murraylands and Riverland Regional Profile](#).





CORE STRENGTHS OF OUR REGION

› Proximity and access to the Murray River.

› Fertile, flat farm land, stable climatic conditions and strong bio security.

› Relatively cheap land for residential and commercial use.

› Proximity to large markets (to the east, Victoria's western Loddon Mallee and Grampians regions which are home to some 317,000 and 272,000 people respectively; to the west – greater Adelaide which is home to some 1.1 million people).

› Skills and knowledge of farming in our region built up over many generations (e.g. understanding what crops and farming methods work best in our unique soils and climatic conditions).

› Ability of our commercial operations to leverage best practice techniques and technology (e.g. energy efficiency, minimising waste).

BENEFITS AND OPPORTUNITIES

› Highly competitive primary production output (agriculture and livestock).

› Tourism (houseboats, river side holidays within close proximity to Adelaide metropolitan area).

› Attractive residential lifestyle.

› Exceptional pre-retirement and retirement accommodation opportunities with flow on demand for health care, assistance services and other complimentary services.

› Efficient farming (dry land cropping and horticulture, animal production) evidenced by strong lead in fruit and nut production.

› Fruit fly free status provides quality produce for domestic and international markets.

› Greater value for money for residents (i.e they spend less to own or rent their home).

› Less fixed capital requirements for commercial operators.

› Relatively cheap access to domestic markets (via road).

› Domestic tourism (via road).

› Awareness of our attractive business and residential lifestyle (for road travellers).

› Efficient primary production of specific crops/outputs (now and being passed on to next generation operating in the region).

› Compensating for disadvantages has made some industries in our region highly competitive (e.g. in water efficiency for primary production).





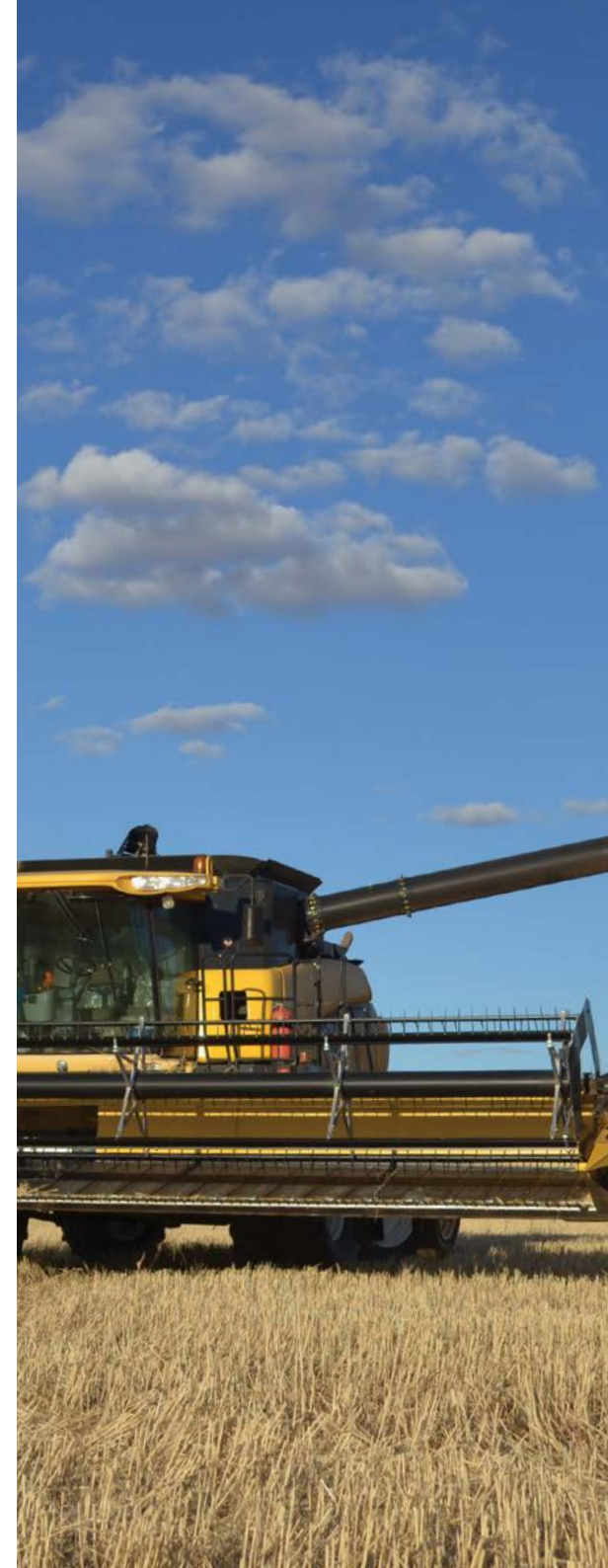
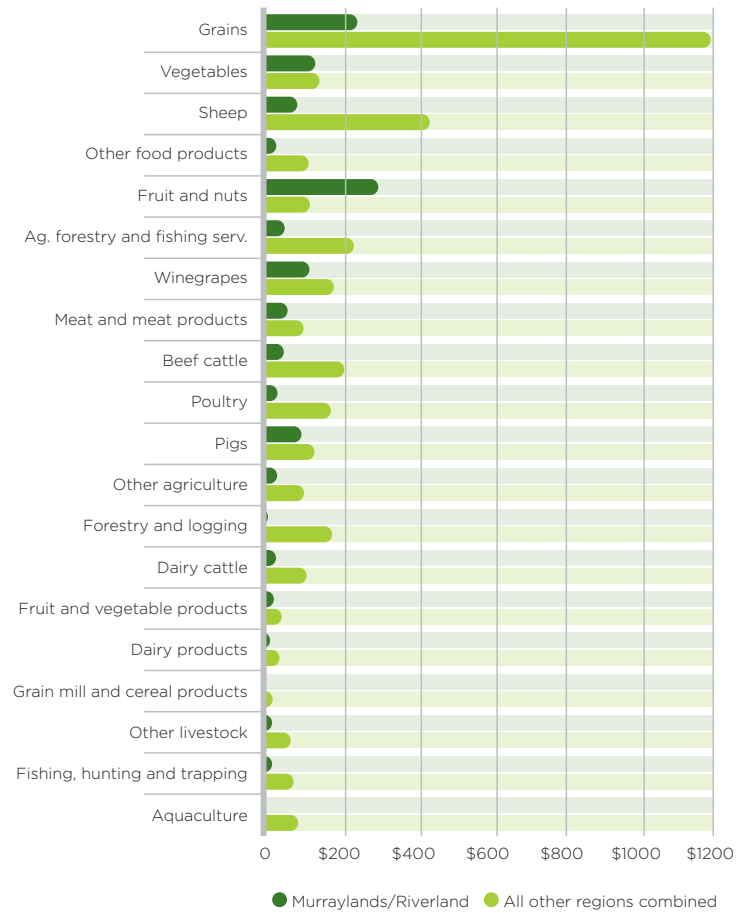
OUR COMPETITIVE ADVANTAGES | **COMMENTARY ON OUR COMPETITIVE POSITION**

<p>1. Extent to which our firms are upgrading their technology, skills of their work force and business processes.</p>	<ul style="list-style-type: none"> ▶ Our primary production industries are actively leveraging technology to increase their competitiveness (e.g. water efficiency, use of machinery, maximising transport logistics and sustainable land use practices).
<p>2. Labour market effectiveness and efficiency (local firms can satisfy their need for labour from the locally available workforce).</p>	<ul style="list-style-type: none"> ▶ We have the highest rate of unemployment among the regional economies in South Australia however our firms are able to currently satisfy most of their labour needs as well or better than firms in other regions. ▶ With growth in the region particularly in food processing, we are expecting that the demand for labour may start to create potential barriers which will need to be addressed. ▶ Some sections of the community experience multiple challenges and barriers to entering the workforce, and providing the support needed to overcome these challenges requires a long term, strategic approach.
<p>3. Profitability of local firms relative to businesses operating in other regions.</p>	<ul style="list-style-type: none"> ▶ Our flat, fertile farmland combined with access to water from the River Murray gives a cost advantage to our primary producers who are able to capitalise on these strengths (e.g. stone fruit and nut growers in the Riverland).
<p>4. Level of local market demand for what is produced in our region versus what is exported.</p>	<ul style="list-style-type: none"> ▶ We have a low 'in region use' for our primary production products – most of it is used for export. Our local market is not big enough to influence what is produced, so we are trend participants not trend setters globally.
<p>5. Level of efficiency and effectiveness of supporting industries.</p>	<ul style="list-style-type: none"> ▶ Major input costs of electricity and water as supporting industries is one of the highest in Australia. ▶ Our region's costs paid for these inputs is no different to other regions in South Australia. We are at a cost disadvantage as a state at the national level, but not at a regional level in South Australia. ▶ Our region is one of the most efficient users of water and has the highest investment in sustainable sources of energy.
<p>6. Capability of government agencies to facilitate the improvement of 1-5 above.</p>	<ul style="list-style-type: none"> ▶ We have a number of government agencies/authorities that are creating value for the region, however there is room for improvement e.g coordinating the efforts of all agencies to deliver specific outcomes with greatest benefit.

Primary production is our core economic strength, underpinned by our leadership in water efficiency and our knowledge base, enabling us to competitively produce the variety of products we do in the specific climate and soils of our region.

We are leaders in a number of primary goods where our output makes up a large proportion of the total regional output for South Australia. These include Fruits & Nuts, Vegetables, Winegrapes, Pigs and Meat & Meat Products.

**GRP OUTPUT BY ALL REGIONS
(EXCLUDING ADELAIDE METRO) 2012/2013 \$M**





OUR RELATIVE COMPETITIVE POSITION TODAY

Our region has the third largest population base, third largest GRP and third largest Tourism sector with the highest Primary Production GRP and one of the lowest population growth rates.

Source: RISE models, regional data profiles from SA Government website 2010-2013 (<http://data.sa.gov.au/data/dataset/>), and internal analysis



4. Vision for Our Region

Our Vision: A vibrant resilient region that capitalises on change, embraces economic development and prosperity, and provides an inspirational living, investment and working environment.

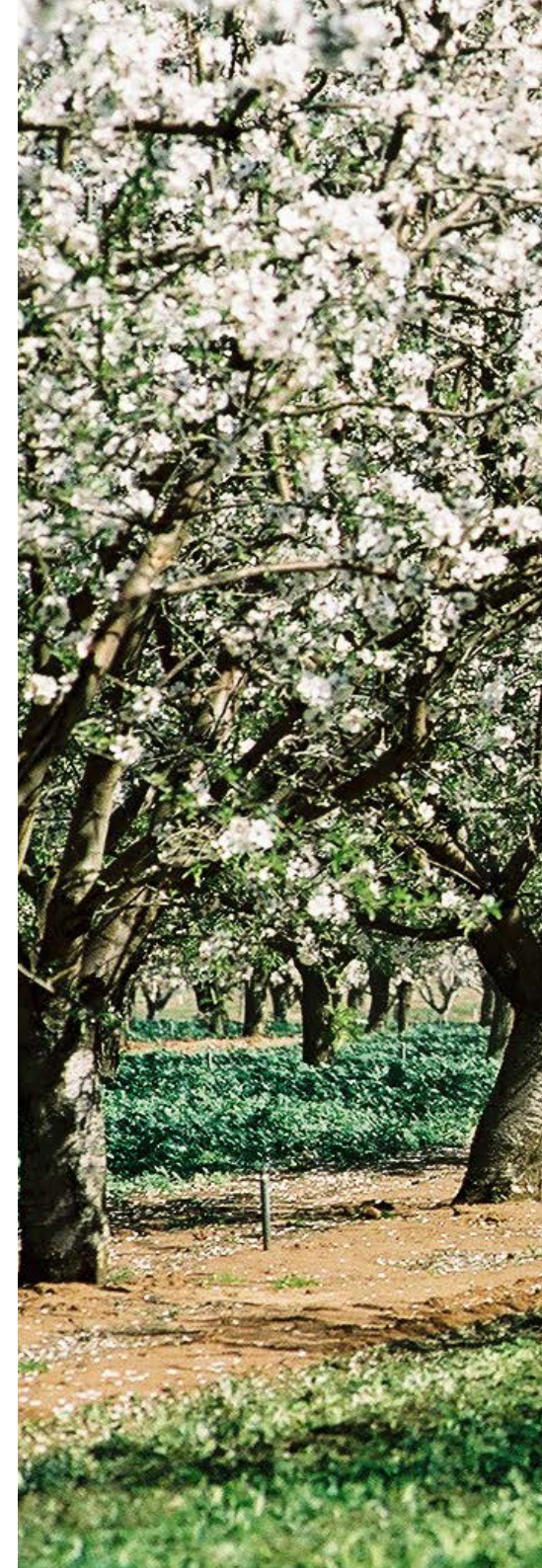
We intend for this Vision to guide all activities undertaken to benefit the region. We believe in this Vision and see it as the legacy we will leave for future generations who will inherit the lifestyle and assets we create on our journey.

Like all other RDA organisations we are operating in a competitive environment, with other regions looking to achieve similar visions to ours.

We must take into consideration the offers being made by our competitors over the long term, and how we will identify and capitalise on our strengths to differentiate our region and achieve our vision.

Achieving our Vision will require the successful execution of more than one Strategic Plan.

STRATEGIC PLANS These are the short to medium term plans (3-4 year cycle) we are committing to progress the vision we have for the region.





ISSUES FACED BY THE REGION IDENTIFIED THROUGH STRATEGIC PLAN CONSULTATION

- ▶ *Water security - without certainty around water usage the region can't function.*
- ▶ *Energy security is a big barrier - if we lose power for more than 24 hours crops can fail. No point having water if you can't move it.*
- ▶ *Population is going backward in many places - people aren't seeing a future in these places.*
- ▶ *Agricultural production is employing more technology and displacing human labour (and as a result our region may lose highly valuable human expertise across the industry).*
- ▶ *How we can incorporate the smaller towns in the Vision who are shrinking in population and services.*
- ▶ *Health and safety compliance makes it harder to hire/be hired combined with wage floors make labour more expensive for exporters.*
- ▶ *Culture of our unemployed (especially younger people) is not helping the region do what it does best.*
- ▶ *We are two different regions forced to combine - one is doing better than the other in terms of population and might require a completely different strategy to address.*
- ▶ *Bringing our community along with us on the journey and getting them to understand what we are trying to do for them is important.*
- ▶ *Poor perception of the region from outsiders who don't know either Murraylands or Riverland, this includes respect for our region from the urban people from outside our region who don't understand what we do for them and our role in the total state economy.*

CRITICAL SUCCESS FACTORS TO ACHIEVE OUR VISION

1

WATER AND ENERGY SECURITY

- ▶ Water and energy security are essential to deliver the economic output required to be a vibrant, resilient and inspirational region.
- ▶ Water is the lifeblood of the region. However, without electricity, it can not be manipulated to irrigate farmlands which produce the economic output to generate employment.

2

CAPABILITY OF OUR COMMERCIAL, COMMUNITY AND GOVERNMENT ORGANISATIONS OPERATING IN THE REGION

- ▶ The higher levels of capability the leadership organisations operating in our region have, the more effective and efficient they will be contributing to our region's economic future.
- ▶ We do not have excess economic surplus or capacity in our region to waste precious opportunities or resources.
- ▶ Leadership organisations need to be astute and capable enough to capitalise on every opportunity that comes our region's way.

3

'WHOLE OF REGION' APPROACH TO BUILDING THE FOUNDATIONS FOR A VIBRANT AND RESILIENT ECONOMY

- ▶ Where it makes sense, unite the region's efforts to deliver those large scale economic foundations necessary for a vibrant and resilient economy (eg: water and energy security, road, rail and air transport infrastructure, telecommunications, heavy manufacturing precincts and urban renewal).

MEASURING PROGRESS TOWARDS OUR VISION

"A vibrant resilient region that capitalises on change, embraces economic development and prosperity, and provides an inspirational living, investment and working environment"

MEASURE

WHAT OUR REGION LOOKS LIKE TODAY (2012/13)

WHAT OUR REGION WILL LOOK LIKE IN 2020



WATER AND ENERGY SECURITY

▶ Security and cost of water and energy are actual and potential barriers to economic development and new investment

▶ Energy and water security present no barrier to business investment and expansion in our region as measured by business sentiment and continuity of access



GROSS REGIONAL PRODUCT

▶ 3rd largest economy by Gross Regional Product (GRP) (\$3.66B)

▶ At least 3rd largest economy by GRP (estimate at \$4B+)



POPULATION

▶ 3rd largest population base (70,633) and 5th fastest population growth rate (0.4% change from 2006 to 2011 census)

▶ At least 4th largest population base (>72,000). To maintain 3rd largest population would need to aim for a population base of 78,500 (growth of 1.2%p.a)

▶ Balanced spread of our population to allow for Murray Bridge to expand but not at the cost of smaller townships



KEY GRP SECTORS

▶ Largest primary production by GRP (\$1.2B or 34% of total GRP) ▶ Equal third highest GRP from tourism (\$262M of 7% of total GRP) ▶ 4th highest average GRP/visitor night (\$476)

▶ Largest primary production by GRP (>\$1.4B GRP) ▶ Equal third highest or better GRP from tourism (>\$300M GRP) ▶ 3rd highest average GRP/visitor night (>\$500)



GRP/PERSON

▶ 3rd highest GRP/Person of \$51,831

▶ 3rd highest or better GRP/Person of >\$54,800



HOUSEHOLD INCOME

▶ 5th highest household average income per capita of \$24,762

▶ 4th highest or better household average income per capita



UNEMPLOYMENT

▶ Highest regional unemployment rate of 6.5%

▶ Middle of the pack for unemployment (i.e third highest or better)



5. Strategic Plan toward our Vision

Our Vision: A vibrant resilient region that capitalises on change, embraces economic development and prosperity, and provides an inspirational living, investment and working environment.



STRATEGIC DIRECTIVES 2016-2020



INITIATIVES TO BE CHAMPIONED, SUPPORTED AND DELIVERED BY RDA MURRAYLANDS AND RIVERLAND AND ITS REGIONAL PARTNERS



STRATEGIC DIRECTIVE

PRIORITIES 2016-2020

EXTEND OUR LEAD IN PRIMARY PRODUCTION AND LEVERAGE IT INTO OTHER SECTORS

Priority 1: Assist our Primary Production sector to grow sustainably

INITIATIVE 1.1:

Provide commercial support to businesses looking to grow their market share and expand local production.

- ▶ Business advisory services including employment and training support.
- ▶ Provide grant writing assistance to support successful applications to funding programs.
- ▶ Pilot and refine a business export program.
- ▶ Pilot and refine Business Growth Plan and Feasibility Analysis tools.
- ▶ Undertake scoping study of local primary production expansion capacity.
- ▶ Support efficiency and effectiveness of access to markets (e.g leveraging Renmark Regional Airport, as well as intermodals and improved road, rail, port and mobile connectivity).
- ▶ Pilot project for Lower Murray Floodplain activation.
- ▶ Develop, implement and promote available workforce initiatives in partnership with business.

INITIATIVE 1.2:

Seek improvements in water and energy security for all primary producers in the region.

- ▶ Foster collaborative water and energy arrangements e.g. Coorong Water Transport Scheme, Monarto South, Riverland Energy Association.
- ▶ Undertake scoping study of current regional energy requirements and constraints.
- ▶ Advocate on Adelaide Desalination Plant triggers and associated SA Government water and energy security.
- ▶ Contribute to collaborative Regional Dry Times and High Water preparedness.
- ▶ Investigate waste stream conversions into energy (e.g. SARDI research and MFA research).
- ▶ Support solar and wind power regional investments.

INITIATIVE 1.3:

Identify and nurture new value adding opportunities, particularly in the key primary production industries we excel in.

- ▶ Undertake scoping study of value-added opportunities for the region.
- ▶ Develop a Regional Value-Added Prospectus and preliminary feasibility study of top five opportunities for the region.
- ▶ Explore opportunities for development of on-land and river fishery options, as aligned to Murray River brand e.g. marron, yabbies, cod.
- ▶ Create partnerships with Universities and other national and international experts to deliver strong insights to regional businesses.



STRATEGIC DIRECTIVE

PRIORITIES 2016-2020

EXTEND OUR LEAD IN PRIMARY PRODUCTION AND LEVERAGE IT INTO OTHER SECTORS

Priority 2: Extend Primary Production success into other sectors

INITIATIVE 2.1:

Investigate how we can maximise our Primary Production leadership to increase tourism to our region.

- ▶ Promote Hosting Fellowship and relevant study and education tourism.
- ▶ Capitalise on direct flight access to Adelaide from Asia.
- ▶ Identify and increase the number of farm-gate tourism opportunities by working collaboratively with regional partners.
- ▶ Paddock to Plate program to feature local produce on menus in the region.
- ▶ Integrate regional arts with a primary production/nature based themes e.g. Coonalypn Silo Arts Program.
- ▶ Investigate seasonal workforce for primary production and how to increase length of stay in the region by providing an excellent authentic experiences (e.g. Backpackers and Seasonal fruit picking trail).
- ▶ Continue to support the Riverland Trust Mark and look for other ways to grow and develop a premium quality brand.

INITIATIVE 2.2:

Identify opportunities for leveraging the Primary Production infrastructure for other sectors in our region e.g. transport and storage, access to export markets, education, knowledge and expertise that could be adapted to other sectors.

- ▶ Implement study to identify infrastructure (hard and soft) that has transferable use or adaption possibilities in the region.
- ▶ Focus on educational opportunities that provide a point of difference available through our lead in Primary production.
- ▶ Identify flexible workforce opportunities within the region.
- ▶ Support collaborative funding programs which have outcomes across sectors based on a primary production lead (e.g. FIAL).

INITIATIVE 2.3:

Identify opportunities for businesses in our region to service our Primary Producers better than those suppliers from outside our region or bring the supply chain back into the region.

- ▶ Map current Primary Production locally sourced status and identify biggest opportunities for the short, medium and long term. Current expectation is that this will include manufacturing and services industries.
- ▶ Partner with other key industry groups or leadership organisations to identify opportunities and convert to local investment.
- ▶ Develop collateral to attract the establishment of new regionally based offices of Adelaide, Interstate or International businesses.

STRATEGIC DIRECTIVE

PRIORITIES 2016-2020

CAPABILITY OF OUR COMMERCIAL, COMMUNITY AND GOVERNMENT ORGANISATIONS IN THE REGION

Priority 3: Assist our commercial, community and government organisations to increase their capability to deliver value for the region

INITIATIVE 3.1:

Improve regional capability by focusing first on the most valuable economic opportunities for the region e.g. export and investment capability, technology application, sourcing and managing labour, marketing and business management practises.

- ▶ Lead the implementation of regional programs involving relevant experts in:
 - ▶ Export readiness
 - ▶ Inward investment for growth
 - ▶ Sourcing and managing labour
 - ▶ Innovation
 - ▶ Lean manufacturing
 - ▶ Digital economy
- ▶ Continue investment to support training and employment programs in our region (e.g. career development centres).
- ▶ Support and promote other relevant projects and programs that seek to improve the economic position of the region.

INITIATIVE 3.2:

Assist other leadership organisations in the region to improve their value to our regions economy.

- ▶ Support Business Alliances and Collaborations.
- ▶ Develop a platform to provide regional businesses and organisations with relevant insights and intelligence to help support business decisions.
- ▶ Establish formal collaborative arrangements with key regional organisations.

INITIATIVE 3.3:

Generate opportunities for commercial innovation in the region through implementing new technologies, fostering collaboration across industries, creation of smart specialisations and encouraging firms to export.

- ▶ Advocate for the development of a One Murray River Authority or similar framework.
- ▶ Develop strong networks and collaborations with the Education sector to support initiatives such as the Murray Bridge Adult Education Precinct, the Riverland Smart Hub, Flinders Medical etc.
- ▶ Pilot a Smart Specialisation program across the region.
- ▶ Encourage business incubator programs.





STRATEGIC DIRECTIVE

BUILD A SINGLE IDENTITY THAT UNITES THE REGION

INITIATIVE 4.1:

Lead a regional brand development program to create a united identity for the region as a whole, to be leveraged by businesses, tourism operators, local governments and other organisations to attract new interest and investment into our region.

- ▶ Implement a township survey so that the key strengths and opportunities of each of our regional towns is known and can be promoted individually as well as together as a whole.
- ▶ Based on the township survey, develop collateral and materials which can be leveraged to attract new interest and investment into our region.
- ▶ Update the Jobs, Growth & Investment Forecast every two years so that current information is available.
- ▶ Pilot a “regional brand champion” program to engage local people in communicating the region’s brand and generating networks and opportunities.

PRIORITIES 2016-2020

Priority 4: ‘Whole of region’ journey to unite the region under one identity

INITIATIVE 4.2:

Build a region wide campaign to attract new residents, mitigate outward migration and grow tourism to our region.

- ▶ Work collaboratively with other regional stakeholders to identify initiatives that attract new residents in line with our regional competitive strengths. Initial target industries could include converting/augmenting underutilised tourism assets to retirement living (which would require retirement facilities tied in with tourism assets, e.g. caravan parks with manufactured homes for permanent living).
- ▶ Investigate potential to grow the health and community services industry with a focus on demand generated by retirement living communities.
- ▶ In partnership with Regional Tourism Organisations, determine key regional infrastructure and experience requirements which will grow tourism to our region.
- ▶ Support preliminary feasibility studies and advocate for these investment opportunities (again initial target could be developing a ‘tourism to retirement’ transition program with the establishment of pre-retirement and retirement facilities in key lifestyle tourism assets).

6. Analysis of our Region

Our region is the third largest economy in regional South Australia. We have the third largest population base and third largest Gross Regional Product (GRP) (2012/13 in absolute terms and on a GRP/Capita basis).

However, our population base is growing at the second slowest rate and our unemployment rate is high relative to the other regions.

MAJOR ECONOMIC INDICATORS RELATIVE TO OTHER REGIONS (2012/13)**

	MURRAYLANDS AND RIVERLAND	ADL HILLS+ FL+KI	BAROSSA	LIMESTONE COAST	YORK MID NORTH	WHYALLA-EYRE
Population Base	70,633	119,147	67,059	66,762	76,613	58,708
Population growth rate 2006-2011	0.4%	1.7%	1.7%	0.7%	0.7%	0.7%
GRP \$M 2012-13	\$3,661	\$3,893	\$2,743	\$3,513	\$3,686	\$3,468
GRP/Capita	\$51,831	\$32,674	\$40,904	\$52,620	\$48,112	\$59,072
Household Income \$M 2012-13	\$1,749	\$2,079	\$1,435	\$1,961	\$1,801	\$1,810
Household Income per Capita	\$24,762	\$17,449	\$21,399	\$29,373	\$23,508	\$30,831
Labour market size (people 15-64yo)/% of population base	43,026 / 61%	61,046 / 51%	43,917 / 65%	43,771 / 66%	46,618 / 61%	37,803 / 64%
Unemployment (Total) %	6.5%	4.5%	4.6%	4.3%	5.3% & 3.9%*	5.0%
Primary Production GRP \$M 2012-13	\$1,232	\$605	\$465	\$851	\$1,034	\$580
% of GRP from Primary Production	34%	16%	17%	24%	28%	17%
Tourism GRP \$M	\$262	\$448	\$201	\$210	\$368	\$262
% of GRP from tourism	7%	12%	7%	6%	10%	8%

* Not one unemployment rate for the entire region but one for Port Pirie ESA (5.3%) and Kadina-Clare of 3.9%

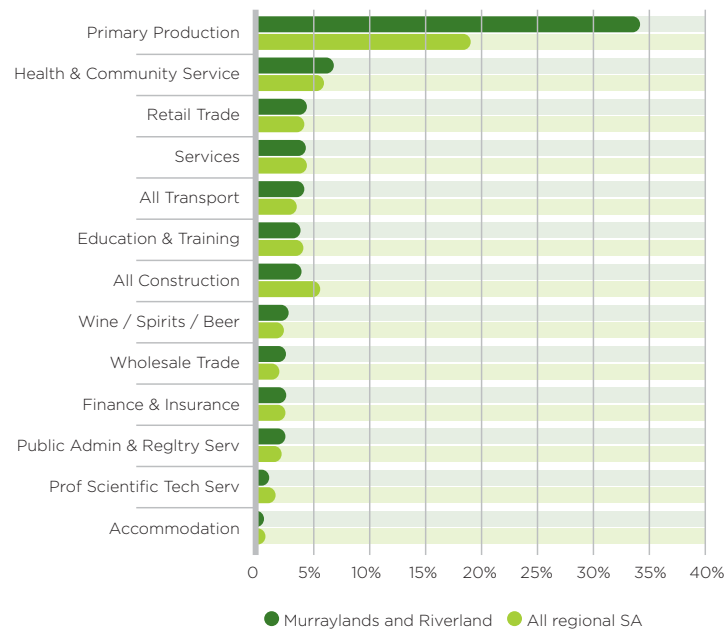
** Excludes Far North Region

Source: <http://economic-indicators.id.com.au/>; regional data profiles SA Government 2010-2013 (<http://data.sa.gov.au/data/dataset>), internal analysis. Population from ABS quick view census data 2011; Unemployment rate based on Jun or Sep Qtr 2012 figures.

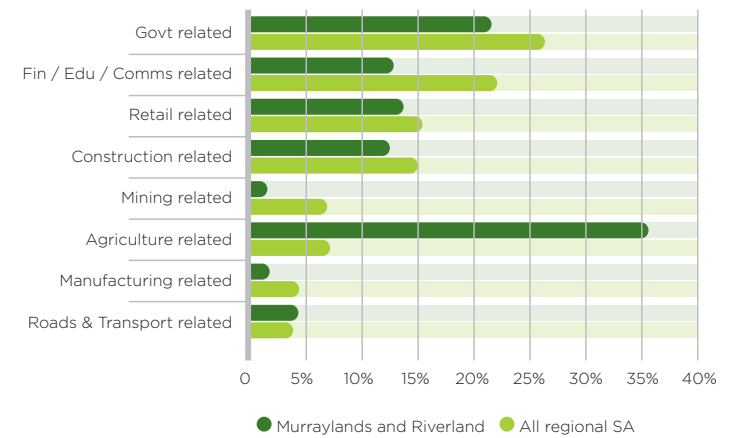


Our Murraylands and Riverland economy is dominated by Primary Production which accounted for 34% of Gross Regional Product in 2012/13. When looking at all of regional South Australia combined, Primary Production is still the largest source of GRP (19%) but no other region is as dependent on it as we are.

**MURRAYLANDS AND RIVERLAND
LARGEST GRP SECTORS (% OF GRP)**



**HOW OUR ECONOMY COMPARES
TO SOUTH AUSTRALIA**



* See tourism numbers on next page

Source: RISE models, regional data profiles SA Government 2010-2013 (<http://data.sa.gov.au/data/dataset>); and internal analysis

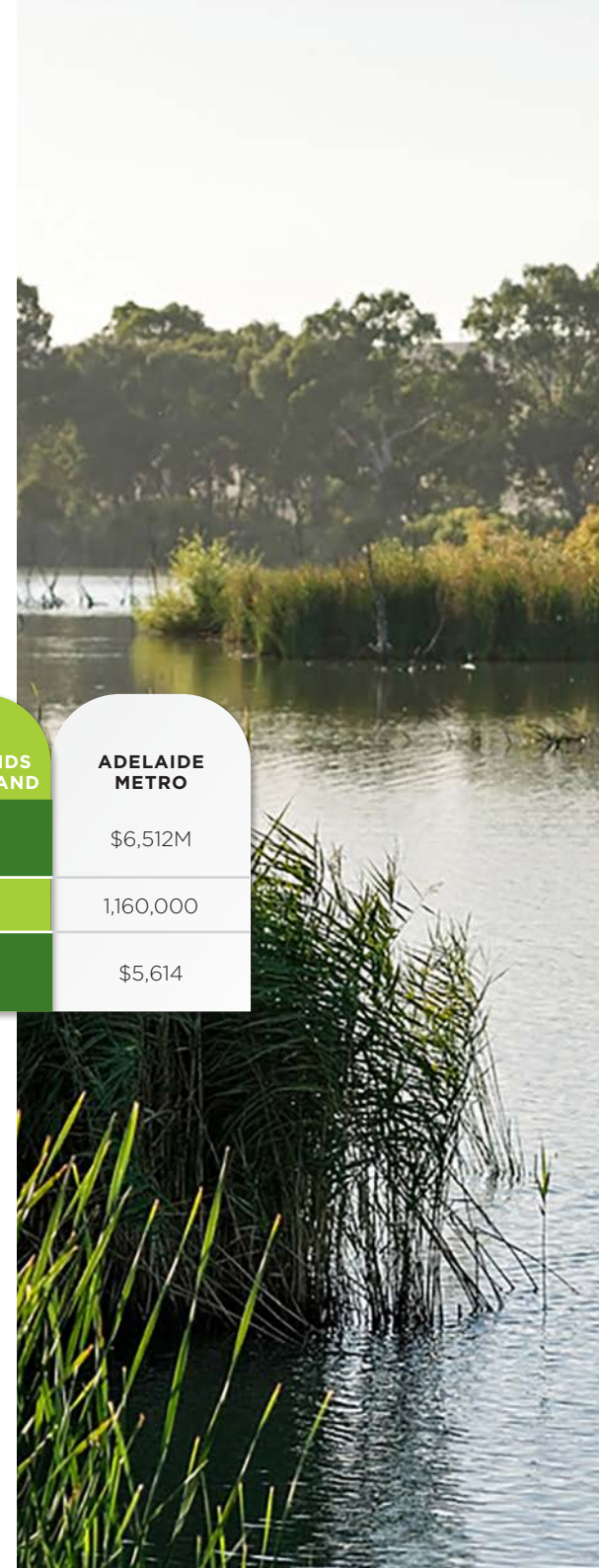
HEALTH AND COMMUNITY SERVICES

The Health & Community Services industry is the second largest source of GRP for the Murraylands and Riverland region, accounting for 7% in 2012/13 compared to 6% for all other region and 9% for South Australia. This industry spans a number of social services, health and aging related services.

Amongst all South Australian regional economies, our region had the third highest total spend on Health & Community Services and the third largest spend on a per capita basis in 2012/13.

	ADL HILLS+ FL+KI	BAROSSA	LIMESTONE COAST	YORK MID NORTH	WHYALLA-EYRE	MURRAYLANDS AND RIVERLAND	ADELAIDE METRO
GRP on Health & Community Services \$M	\$273M	\$164M	\$229M	\$287M	\$236M	\$260M	\$6,512M
Population Base	119,147	67,059	66,762	76,613	58,708	70,633	1,160,000
GRP/capita on Health & Community Services	\$2,289	\$2,440	\$3,429	\$3,750	\$4,025	\$3,682	\$5,614

Source: RISE models, regional data profiles SA Government 2010-2013
(<http://data.sa.gov.au/data/dataset/>); 2011 ABS census and internal analysis.

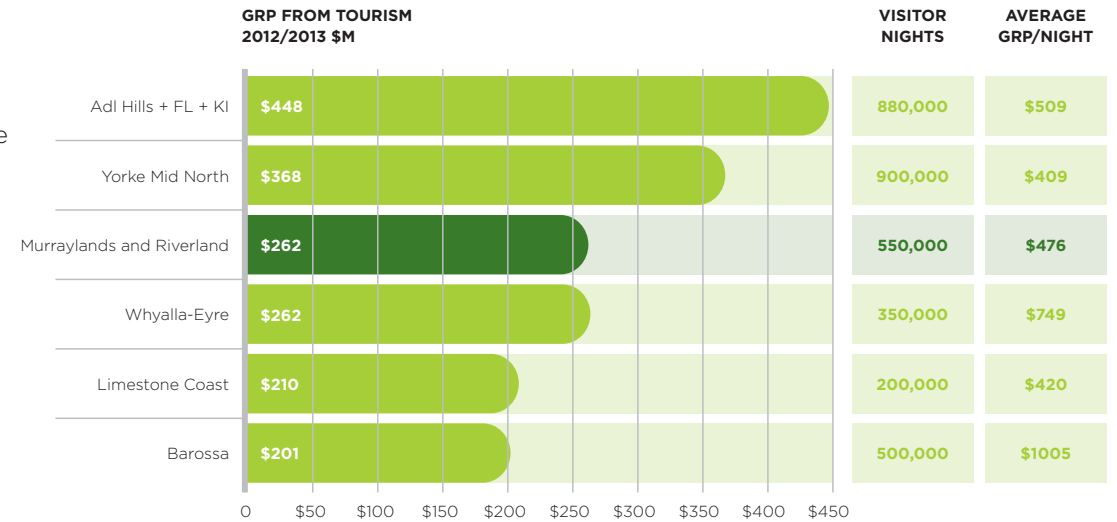




TOURISM

Our Murraylands and Riverland tourism industry has historically been split across a number of categories that make up the total GRP for the region.

Tourism is a major driver of economic growth for the region as it provides a mechanism to attract residents (population growth), promote expenditure with local businesses and boost employment. Tourism encompasses retail, accommodation and transport in particular, with knock on effects to many other areas of our local economy.



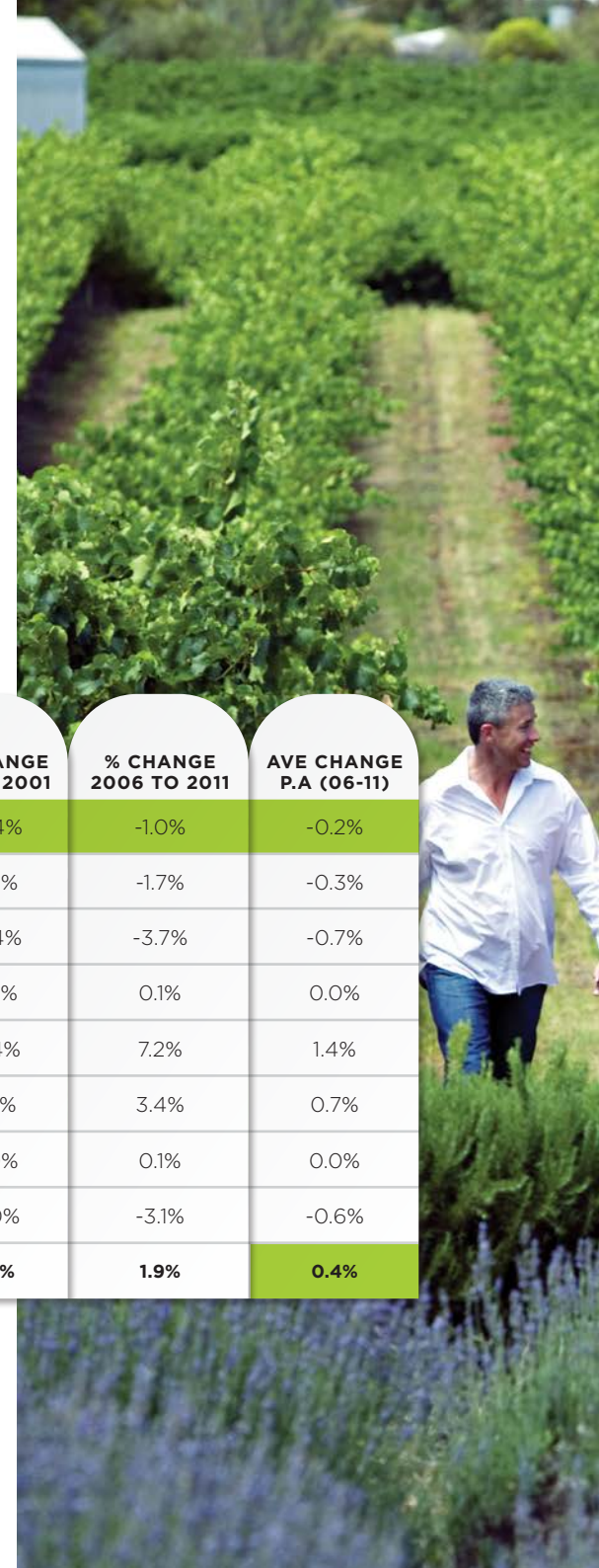
Source: RDAMR tourism research; RISE models 2012/13

SUSTAINABLE COMMUNITIES AND POPULATION GROWTH

Our region's population base of 70,633 has grown at an average rate of 0.4%p.a (average growth from 2006 to 2011). However within the overall growth of the region, some local government areas have a shrinking population while others have a growing population base.

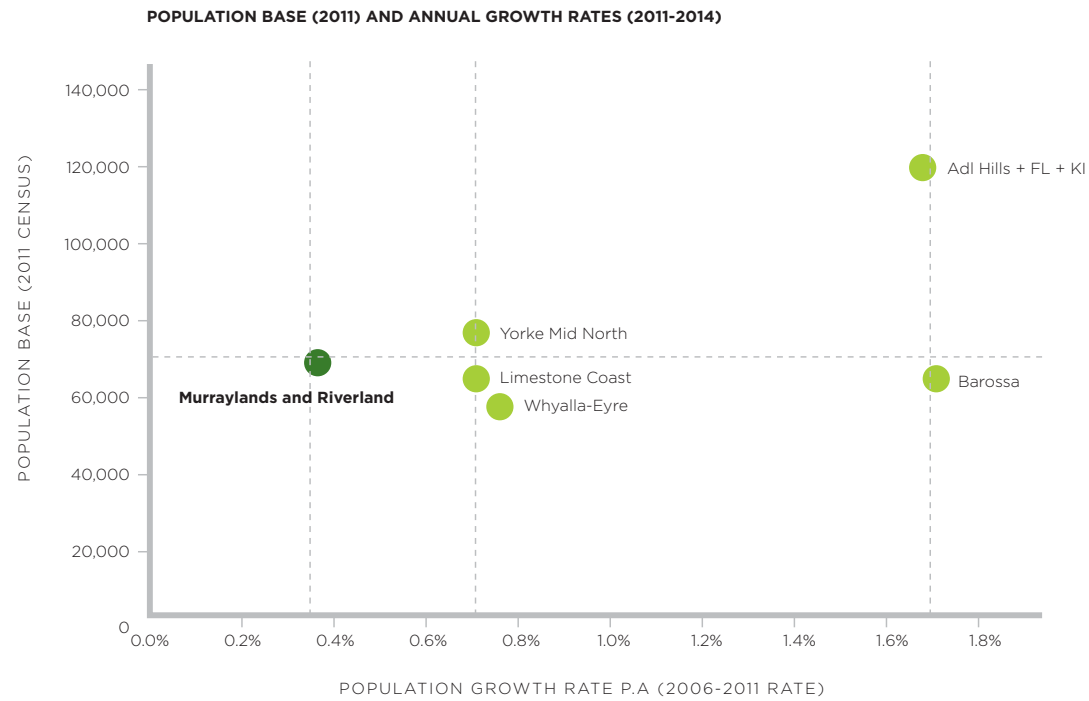
LGA TERRITORY	POPULATION 2001 CENSUS	POPULATION 2006 CENSUS	POPULATION 2011 CENSUS	% TOTAL 2001	% TOTAL 2006	% TOTAL 2011	CHANGE 2001 TO 2011	% CHANGE FROM 2001	% CHANGE 2006 TO 2011	AVE CHANGE P.A (06-11)
Berri-Barmera	11,320	11,391	11,279	17%	16%	16%	-41	-0.4%	-1.0%	-0.2%
Coorong	5,917	5,916	5,813	9%	9%	8%	-104	-1.8%	-1.7%	-0.3%
Karoonda-Lameroo	1,281	1,205	1,161	2%	2%	2%	-120	-9.4%	-3.7%	-0.7%
Loxton-Waikerie	12,247	12,062	12,069	18%	17%	17%	-178	-1.5%	0.1%	0.0%
Murray Bridge	17,094	18,402	19,724	25%	27%	28%	2,630	15.4%	7.2%	1.4%
Mid Murray	8,410	8,326	8,606	12%	12%	12%	196	2.3%	3.4%	0.7%
Renmark	9,834	9,820	9,834	14%	14%	14%	0	0.0%	0.1%	0.0%
Southern Mallee	2,309	2,216	2,147	3%	3%	3%	-162	-7.0%	-3.1%	-0.6%
TOTAL	68,412	69,338	70,633				2,221	3.2%	1.9%	0.4%

Source: ABS quick view census data 2006-2011, population by Local Government Area





Relative to other regions, our population base of 70,633 is the third largest, but its growth rate of 0.4%p.a is slow compared to Yorke, Limestone and Whyalla regions which are growing at 0.7%, and Adelaide Hills and Barossa regions which are growing at 1.7% per year.



Source: ABS quick view census data 2006-2011, population by Local Government

The geographic spread of our population means that some townships are within commuting distance to metropolitan Adelaide while others are far more remote. The major population centre of Murray Bridge accounts for 28% of the region's population and is a 50 minute drive from metropolitan Adelaide.

The other major centres are located in the Riverland (Barmara, Berri, Loxton, Waikerie and Renmark) which combined account for 31% of the population of the region.

POPULATION CENTRE	POPULATION	DISTANCE FROM ADELAIDE	APPROX. DRIVE TIME
Murray Bridge	19,724	75km	50 min
Monarto	500	60km	45 min
Mannum	2,200	100km	80 min
Tailem Bend	1,800	100km	80 min
Coonalpyn	200	165km	120 min
Karoonda	1,033	160km	110 min
Pinnaroo	587	260km	180 min
Waikerie	2,715	180km	120 min
Barmara	3,015	220km	165 min
Loxton (inc. north)	5,236	250km	180 min
Berri	4,103	250km	180 min
Renmark	7,491	260km	200 min

Source: Each suburb population generated by http://www.censusdata.abs.gov.au/census_services/getproduct/census/2011/quickstat





HUMAN CAPITAL

Key characteristics of our human capital:

- ▶ In 2014, our region had an estimated working age population of 42,686 people.
- ▶ Our labour force is some 33,080 people strong and in line with our GRP, the largest sources of jobs in our region our primary production, health services, retail and manufacturing.
- ▶ As at March 2016 there were 2,867 unemployed individuals, representing an unemployment rate of 8.7% (up from 6.5% in Jun 2012).
- ▶ The most recent regional data available (Census 2011) puts the unemployment rate amongst young people in our region at 12.4%, and as high as 15.9% in some areas.
- ▶ Our region's youth unemployment rate is relatively high compared to the region's overall unemployment rate of 8.7%, but comparable to the youth unemployment rate for all of South Australia (12.6%).
- ▶ South Australia's youth unemployment rate has been falling since December 2015 when it peaked at 15.6% and in July 2016 was 14.9%.
- ▶ Our region has a slightly higher proportion of the workforce who are managers and labourers, while slightly under represented in occupations such as professionals, clerical/admin and technicians and trade workers.

UNEMPLOYMENT RATE MURRAYLANDS AND RIVERLAND REGION BY LGA MARCH 2016 (AS AT MARCH 2016)

LOCAL GOVERNMENT AREA (LGA)	NUMBER OF INDIVIDUALS UNEMPLOYED	SIZE OF LABOUR FORCE	RATE OF UNEMPLOYMENT
Berri and Barmera (DC)	515	4,905	10.50%
Karoonda East Murray (DC)	26	526	4.90%
Loxton Waikerie (DC)	361	5,640	6.40%
Mid Murray (DC)	292	3,870	7.50%
Murray Bridge (RC)	999	9,530	10.50%
Renmark Paringa (DC)	430	4,724	9.10%
Southern Mallee (DC)	50	1,082	4.60%
The Coorong (DC)	194	2,803	6.90%
Riverland (all DC's)	1,306	15,269	8.60%
Murraylands (all DC's)	1,561	17,811	8.80%
TOTAL RIVER / MURRAYLANDS	2,867	33,080	8.70%

YOUTH UNEMPLOYMENT MURRAYLANDS AND RIVERLAND REGION BY LGA 2011 (AS AT 2011)

LOCAL GOVERNMENT AREA (LGA)	NUMBER OF INDIVIDUALS UNEMPLOYED AGED 15-24 YEARS	SIZE OF LABOUR FORCE AGED 15-24 YEARS	RATE OF UNEMPLOYMENT
Berri and Barmera (DC)	68	428	15.9%
Karoonda East Murray (DC)	7	58	12.1%
Loxton Waikerie (DC)	93	778	12.0%
Mid Murray (DC)	54	412	13.1%
Murray Bridge (RC)	204	1,559	13.1%
Renmark Paringa (DC)	76	698	10.9%
Southern Mallee (DC)	4	123	3.3%
The Coorong (DC)	41	351	11.7%
Riverland (all DC's)	237	1,904	12.4%
Murraylands (all DC's)	310	2,503	12.4%
TOTAL RIVER / MURRAYLANDS	547	4,407	12.4%

Source: ABS 2011 Census Community Profiles for LGAs; Australian Government Department of Employment SA Labour Market Brief July 2016

COMPOSITION OF WORKFORCE BY OCCUPATION

OCCUPATION	MURRAYLANDS AND RIVERLAND ESAs 2011	WORKFORCE PERCENTAGE	SA COUNTRY	AUSTRALIA
Managers	5,497	19.5%	17.0%	13.1%
Professionals	3,012	10.7%	13.7%	21.7%
Technicians and Trade Workers	3,619	12.8%	15.4%	14.4%
Community and Personal Service Workers	2,882	10.2%	10.3%	9.8%
Clerical and Administrative Workers	2,870	10.2%	11.4%	15.0%
Sales Workers	2,302	8.2%	8.8%	9.5%
Machinery Operators and Drivers	2,155	7.6%	8.4%	6.7%
Labourers	5,864	20.8%	15.0%	9.6%
TOTAL	28,201			

COMPOSITION OF WORKFORCE BY OCCUPATION

OCCUPATION	2011 - LIVE IN THE REGION		2011 - WORK IN THE REGION		LOCAL LABOUR MARKET CAPACITY
Managers	5,497	19%	5,244	21%	253
Professionals	3,012	11%	3,046	12%	-34
Technicians and Trade Workers	3,619	13%	2,841	12%	778
Community and Personal Service Workers	2,882	10%	2,587	11%	295
Clerical and Administrative Workers	2,870	10%	2,671	11%	199
Sales Workers	2,302	8%	2,098	9%	204
Machinery Operators and Drivers	2,155	8%	1,620	7%	535
Labourers	5,864	21%	4,410	18%	1,454
TOTAL	28,201		24,517		3,684

ACCESS TO MARKETS

The Murraylands and Riverland region covers a large geographic area giving it proximity to the markets of Adelaide to the west, while to the east across the Victoria border lies the Loddon Mallee and Grampians regions.

TRANSPORT INFRASTRUCTURE

The bulk of produce exported from the region is transported by road.

The main road freight corridors are:

- ▶ Mallee Highway connecting Adelaide with Murray Bridge, Pinnaroo and Sydney.
- ▶ Stuart Highway connecting Adelaide to the Riverland (via the gateway town of Blanchetown) and Mildura.
- ▶ Dukes Highway connecting the region with Melbourne.
- ▶ Karoonda Highway connecting the Murraylands and the Riverland.

No commercial regular air traffic is currently available in the region. However airports with various levels of facilities exist in Waikerie, Loxton, Renmark and Murray Bridge for use by private and charter aircrafts.

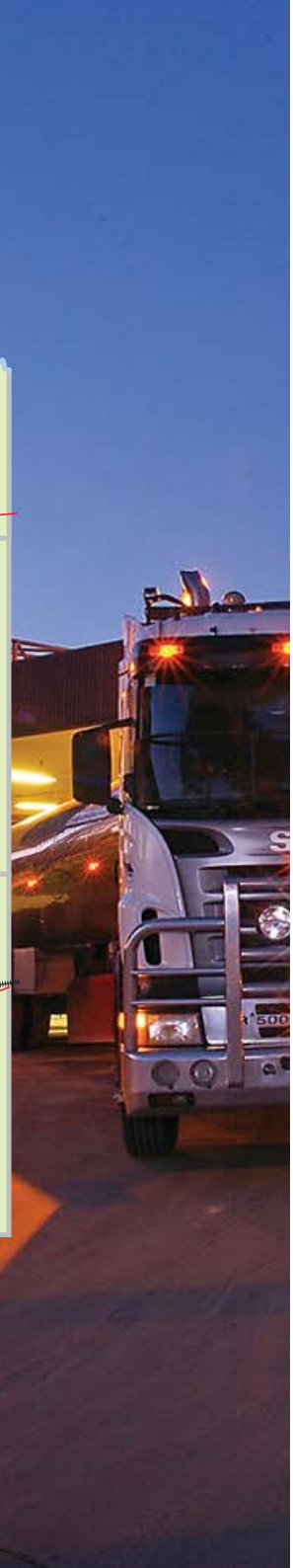
There are no passenger rail services in the region however public and private freight rail networks run through the region.

Passenger commuting is generally restricted to road travel using road freight route.

The River Murray infrastructure in our region includes six marinas and three slipways to service the houseboat, fishing and other commercial and leisure activities on the river.



Source: Mapping Services Australia



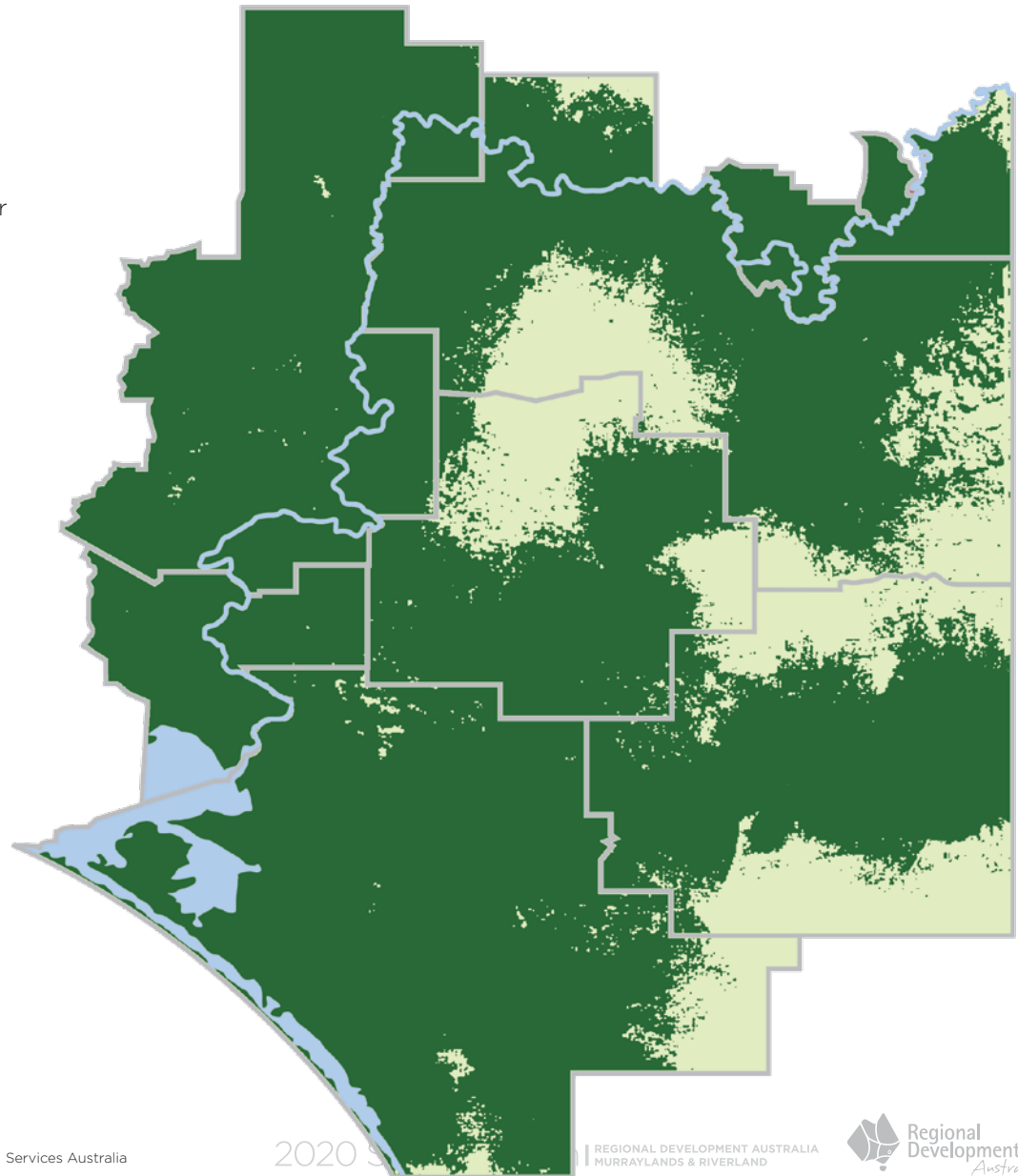


TELECOMMUNICATIONS

Telecommunications services in the region are varied with strong coverage of the 3G and 4G mobile networks in our major centres of Murray Bridge, Berri, Renmark and Loxton. Other townships have varying degrees of coverage.

Our primary producers in more remote locations like Pinnaroo, Karoonda and Coonalpyn districts have the poorest service coverage which can have significant impacts on their operations. It also has implications for childhood education, adult learning and community well being.

- Combined mobile coverage
Telstra and Optus – 3G and 4G device only.
Excludes areas where an external aerial is required.



Source: Internal analysis from RDAMR and Mapping Services Australia

2020

REGIONAL DEVELOPMENT AUSTRALIA
MURRAYLANDS & RIVERLAND

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