



ECONOMIC ACTIVATION PLAN

2018-2023







WELCOME

Acting Mayor's message

As Adelaide's premier seaside destination, we are uniquely placed to grow our economic footprint through a number of initiatives that will both boost our profile and economic returns for the Council and its ratepayers.

As a Council, we are consistently striving to provide the best services possible to our community and to provide activities and build partnerships that bring external investment into the region, in turn boosting the economy, providing local jobs and earning income that can be re-invested into community programs, services and events.

Council has formed strong partnerships with state and federal government and have implemented a number of initiatives including entering into a Memorandum of Understanding (MOU) with the South Australian Small Business Commissioner. The MOU, signed in December 2017 demonstrates a collaborative approach in meeting the needs of business through the delivery of training, forums and networking events, reduction of red tape, commitment to local procurement wherever possible and regularly liaising with businesses for shared economic outcomes.

I endorse this Economic Activation Plan as a significant step in achieving Council's economic goals in the short to medium term, whilst working towards our longer term strategy outlined in the Our Place 2030 Strategic Plan.



Amanda Wilson

Acting Mayor
City of Holdfast Bay

Report prepared by the City of Holdfast Bay 2018

We acknowledge the valuable contribution of our key stakeholders



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A diverse and resilient local economy





CEO MESSAGE

You have heard the politicians say time and again it's all about jobs. Jobs. Jobs. Jobs. Our local economic activity is at the heart of this. Employment is the fundamental building block for individuals to provide for themselves and their families. It provides them with choices about where they live and what their standard of living will be. In other words it provides dignity, a means to a sound economic future and the self-fulfillment of one's destiny.

As an enabler, Council plays a vital role in facilitating, promoting and influencing economic development through its partnership approach with businesses, the community, state and federal government, key stakeholders and representative bodies.

There are also many deep social reasons why Council should be involved in promoting work for people and the economic drivers within our local communities. It's a responsibility we share with other tiers of government. Our shops, our trades, our tourist outlets, our eating places, our retail outlets, our manufacturing, our entertainment, education and health businesses all create a network of prosperity for people. They define our identity and that of our neighbourhood and where we choose to recreate or realise our ambitions.

A recent start up business owner in Somerton Park imagined a new mobile cold-coffee experience for his customers. He has designed every aspect to promote his concept and engaged other local businesses. It's a dream he has for his customers that drives him and that adds to the fabric of our community. Collectively, all these individually in our City define important pieces of who we are and why we like to live here.

I hope you enjoy the plan we have created in the following pages and the reason why we are driven to provide for it as part of 'Our Place 2030'. I trust our work on these strategies will enhance our community now and into the future.



Justin Lynch

Chief Executive Officer
City of Holdfast Bay



EXECUTIVE SUMMARY

The City of Holdfast Bay Economic Activation Plan (EAP) 2018-2023 is a key strategic document that sets a five year plan to deliver achievable and measurable actions through the following five key economic strategic areas:

- › **Strategy 1. Business Capacity Building**
- › **Strategy 2. Investment Attraction and Growth**
- › **Strategy 3. Innovation and Digital Evolution**
- › **Strategy 4. Regional Collaboration**
- › **Strategy 5. Adelaide's Premier Seaside Destination**

The EAP is underpinned by the City of Holdfast Bay's Council Plan and long term vision 'Our Place 2030' and other key strategic documents including Holdfast Bay Tourism Plan 2020, Building Western Adelaide Plan and The 30 Year Plan for Greater Adelaide. The EAP is also informed by consultation with Holdfast Bay businesses, residents, industry representatives and cross Council departmental representation.

The purpose of this EAP is to ensure a whole of city approach to economic development, encompassing the broader alignment with regional and state objectives. The plan supports prioritisation of projects and programs through the actions identified in the final chapter of this document that will enhance and cement our competitive advantage into the future.

It's important we recognise the positive attributes of the city and the unique opportunities that exist. While predominantly residential, the city is supported by vibrant main street retail precincts, commercial centres (along the arterial spine) and a strong light industrial precinct in Somerton Park.

Holdfast Bay boasts a wide range of accommodation and conference facilities all within minutes of the state's international airport and will see the development of the state's first international 6 star rated hotel. Other projects include the redevelopment of the Buffalo replica site, high-rise and high-density residential development in Glenelg and the construction of Coastal Park, a continuous public linear park showcasing and linking western and southern Adelaide's coastal tourism assets.

Latest ABS census data (2016) identifies the city's workforce is predominately professional, community and personal service, technical and trade, and administrative workers. The industries supporting this workforce include health care and social assistance, accommodation and food services, retail, education and training and construction.

The EAP identifies the need for businesses to be more attuned to the opportunities that exist in the digital economy. A survey¹ of Holdfast Bay businesses conducted in 2017 indicated only 25% of our businesses transacted online and 44% invested in digital platforms. Of the 25% most were identified in the retail and hospitality industries, while the 44% were of medium size and likely to have been in business for over 20 years from industries other than the retail and hospitality sector.

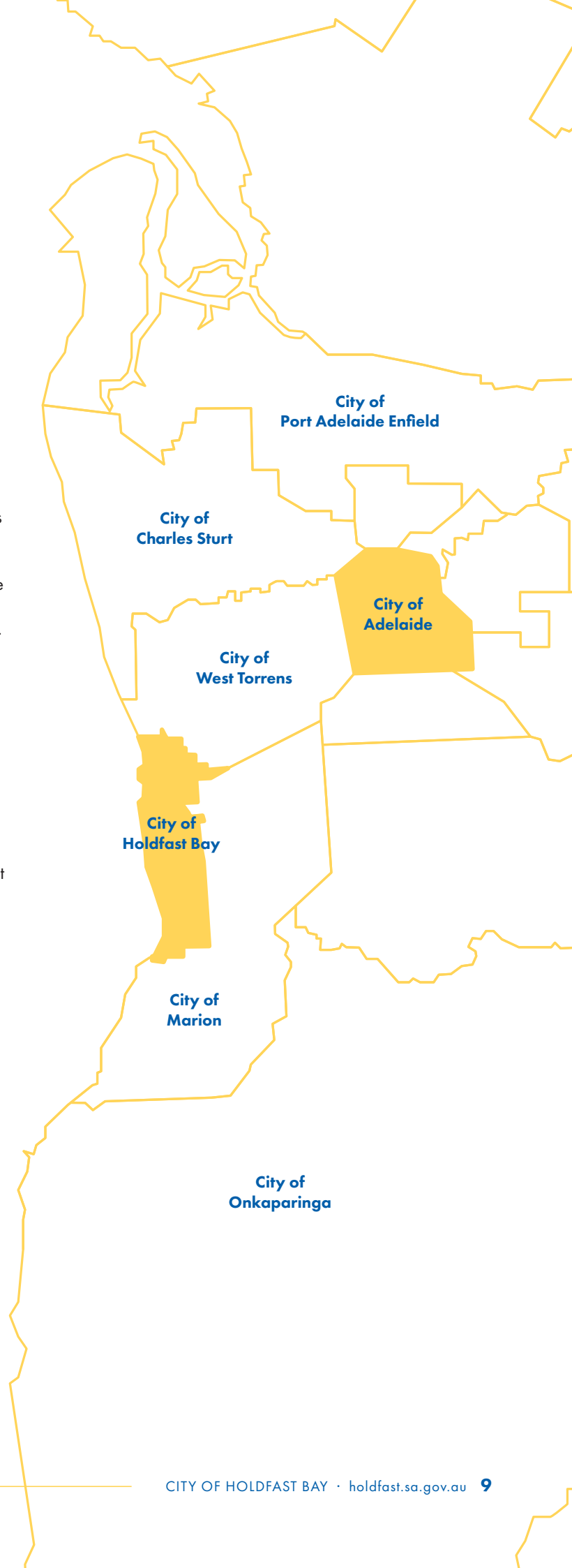
Digital connectivity remains key to the realisation of the EAP with technology infrastructure investment required in both private and public sectors. The way we do business depends very much on ensuring sustainable practices are in place for the enjoyment of the community, businesses and visitors alike into the future.

Providing sustainable infrastructure for autonomous and electric vehicles, and establishing digital hubs will enhance the changing face of transportation and support homebased businesses to integrate within vibrant active creative hubs.

The city is experiencing an increase in retirees aged 50-69 and recent studies show that almost 35% of Australia's young firms are led by seniorpreneurs with an average age of 57 years. Globally, people aged 55 and over are starting new business ventures accounting for nearly a quarter of new ventures in the United States alone. That said, the health and social assistance sectors will benefit from an innovative approach to service delivery and fully understanding the needs of this demographic as Holdfast Bay moves to service its ageing population.

During the life of the Economic Action Plan 2018-2023 Council will continue to report and review the EAP and update actions associated with the plan as economic opportunities are presented and milestones are met.

¹ 2017 City of Holdfast Bay Business Confidence Survey





OUR ECONOMIC VISION



In 2017, following a review of the City of Holdfast Bay strategic plan through extensive community consultation and other stakeholder investigations 'Our Place: 2030 Strategic Plan' was developed.



The 'Our Place 2030' strategy sets out five key Pillars to map our direction and provides objectives for maintaining, processing and celebrating our city into the future:



COMMUNITY

A healthy, creative, connected community



ENVIRONMENT

A community connected to our natural environment



ECONOMY

A diverse and resilient local economy




PLACEMAKING

An accessible, lively and safe coastal city that celebrates our past to build for our future



CULTURE

An effective customer-centred organisation



The economic vision provides us with a framework for delivering key strategic economic outcomes that will:

- › build economic prosperity
- › create a thriving business environment
- › offer employment choice
- › support and grow a vibrant community
- › provide an attractive location for visitors

Our focus will be on supporting the Economy pillar by having a diverse and resilient local economy.



WHAT IS ECONOMIC DEVELOPMENT?

Economic Development can be defined through standard of living and creation of jobs, attracting and maintaining business activity and the support of innovation by involving a multifaceted approach often with federal, state, local governments and industry bodies.

Much of this can be defined through jobs creation, investment in a region, quality of life through access to education systems, transport networks, improved infrastructure and social and environmental sustainability.





STRATEGIC FOCUS

Council has defined five key economic strategic focus areas that ensure a diverse and resilient local economy.

The actions this plan outlines is to develop policies, identify projects and deliver programs concentrating on the following five key strategic areas:

- › **Strategy 1. Business capacity building**
 - › **Strategy 2. Investment attraction and growth**
 - › **Strategy 3. Innovation and digital evolution**
 - › **Strategy 4. Regional collaboration**
 - › **Strategy 5. Adelaide's premier seaside destination**
- 



STRATEGY 1. BUSINESS CAPACITY BUILDING

OBJECTIVE:

Implement and support a range of programs designed to equip local businesses with the knowledge and capacity to achieve business sustainability, manage business expansion and prepare for export opportunities.

Why is this important?

To remain competitive the City of Holdfast Bay is ensuring a sustainable economic future through planned programs and initiatives in collaboration with key stakeholders. Access to B2B networking, business advisory services and small business grants are services Council consider key to maintaining business growth in the city. Coupled with this, Council is utilising data to assist and inform Council and the business community on potential economic drivers, trends and future growth sectors for employment in the city.

Opportunities exist to strengthen the skills, competencies and abilities of our industry sectors by promoting and creating linkages through partnerships with local tertiary and secondary providers. Through capacity building our industry sectors will have a greater understanding of barriers that inhibit economic growth and recognise opportunities to achieve measurable and sustainable outcomes.



STRATEGY 2. INVESTMENT ATTRACTION AND GROWTH

OBJECTIVE:

Explore and develop opportunities in collaboration with state and federal government and the private sector that maximises new investment and economic growth prospects in Holdfast Bay.

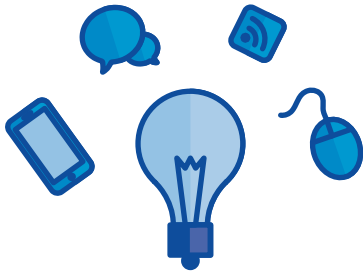
Why is this important?

South Australia's capital city Adelaide, continues to feature in the top 10 most livable cities in the world boasting most affordable housing, notable tourism, fine food and festivals. The State itself is globally recognised for its wine industry and accounts for almost half of the national annual production. The recent Federal Government announcement for the naval shipbuilding project worth almost \$90 billion will see the state's population potentially increase by up to 50,000.

Undeniably, Holdfast Bay with its attractive coastline and most sought after suburbs, makes it one of the state's most desirable places to live and invest while maintaining that competitive edge. It is anticipated many interstate and overseas workers for the defence project will seek to locate in western Adelaide.

Real estate for the city continues to prove very attractive to investors, entrepreneurs and owner-occupiers. Retail plays an important role in the local economy enhanced by a thriving tourism industry as the second most visited area outside of the Adelaide central business district.

Within minutes of the state's international airport, Holdfast Bay is accessible to nearby rail, road and sea freight facilities and is complimented by excellent accommodation and conference venues.



STRATEGY 3. INNOVATION AND DIGITAL EVOLUTION

OBJECTIVE:

Create opportunities that develop the competencies, skills and capacity of local businesses that instills a digital culture and leads to innovation and sustainable outcomes for a vibrant and connected community.

Why is this important?

Exciting opportunities exist in the digital and knowledge economy that will enhance many industry sectors within Holdfast Bay.

Health Care and Social Assistance followed by the Retail, Education and Training sectors are currently our largest employment sectors with Professional and Scientific services and Creative Industries sector expected to increase in the future.

The EAP aims to leverage some of the state's digital infrastructure projects to enhance and broaden the capabilities of our key industry sectors. Opportunities exist to foster high value added activity particularly in the Somerton Park Industrial precinct.

Preparing our industry for the digital and knowledge economy remains challenging with the 2017 Holdfast Bay Business Confidence survey indicated only 25% of businesses transacted online and 44% of those businesses investing in digital platforms. Actions identified in this Plan outline opportunities to engage and link businesses with universities, local secondary schools and training providers to improve their digital knowledge and adopt new practices and create a workforce equipped to adapt to new technologies.

The City of Holdfast Bay will need to take a leadership approach ensuring the city's infrastructure and ability to adapt to emerging technologies remains relevant. Access to learning, connecting with the community and improved technological and intellectual assets will prove vital for the city to demonstrate a responsive and innovative approach to enabling economic development.



STRATEGY 4. REGIONAL COLLABORATION

OBJECTIVE:

Incorporate collaborative regional approaches where shared outcomes can be achieved for a cohesive and robust Holdfast Bay economy.

Why is this important?

Local Government plays a fundamental role in building and sustaining vibrant communities, often taking a multifaceted approach with federal, state, local governments, industry bodies and the community.

Whether it be a whole-of-government or collective approach across a number of key bodies; local government remains at the coalface of the community and has the ability to build and sustain strong, cohesive and resilient communities and drive economic growth.

The City of Holdfast Bay has formed strong alliances with central, western and southern metropolitan regions to identify synergies for the delivery of programs and projects relating to economic development, investment attraction, tourism, wayfinding, workforce development, environmental sustainability and infrastructure. In the western region alone the economy represents 22% of the State's jobs (167,000) and 25% of the State's economic output (\$51B).

Each region, while similar in functionality, is unique in its offering and the collaboration between each region provides a complimentary rather than competitive approach to projects. The willingness to share data and resources has meant a greater understanding of the region's economic landscape and the ability to attract investment to benefit economic growth. The mature working relationship that exists has meant the implementation of;

- › the western alliance of Councils launch of the www.Adelaidebeaches.com tourism website;
- › free visitor advisory service through Southern Adelaide Business Advisory Service;
- › Resilient South Climate Ready Southern Adelaide project;
- › further tourism initiatives with central Adelaide.



STRATEGY 5. ADELAIDE'S PREMIER SEASIDE DESTINATION

OBJECTIVE:

A city that provides a balance between the needs of the local community and visitor expectations through sustainable tourism and protection of amenity and the natural environment.

Why is this important?

Tourism in Holdfast Bay provides significant enjoyment to the local community and visitors alike. More than 75% of tourists visiting Adelaide will visit Holdfast Bay to enjoy the pristine coastline, relaxed retail choices with cafes, bars and restaurants offering an array of international cuisine. International artists and events like the Tour Down Under attract participation and visitation from across the globe, contributing substantially to the local economy.

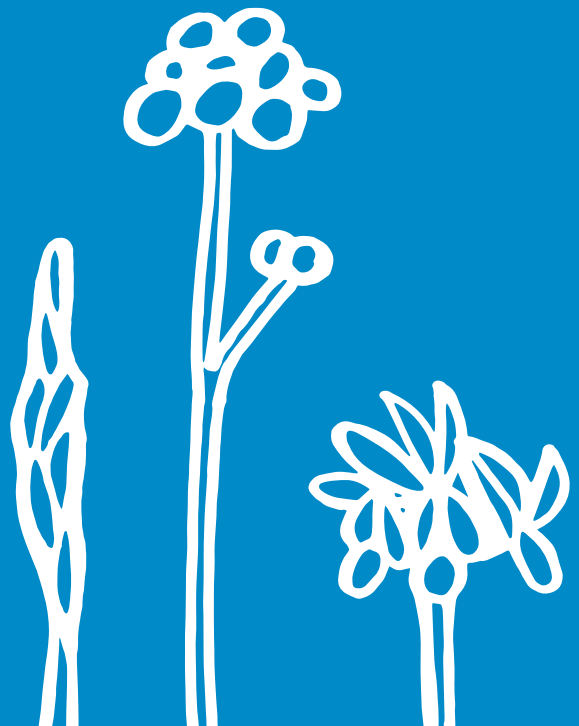
Tourism is a key economic driver for Holdfast Bay injecting \$253 million to the local economy, providing an estimated 1,643 full time equivalent jobs reported in 2017. Visitation has a significant positive flow-on effect for the local community and value add to a number of industry sectors resulting in an additional \$119.341 million to the local economy.



OUR PLACE

The City of Holdfast Bay is one of the most celebrated places to live, work, visit and invest in South Australia.

With an ideal location, just 20 minutes from Adelaide's central business district (CBD) and five minutes from Adelaide International Airport, Holdfast Bay encompasses some of Adelaide's most historic and iconic seaside suburbs.





Our Place:

- › Is home to 35,360 residents, covering an area of 14 square kilometres, with all suburbs within 2.5 kilometres from the beach
- › Is one of South Australia's most sought after destinations to live
- › Is the site of Glenelg, South Australia's original mainland settlement
- › Has an extensive public transport system which includes tram, train and bus routes directly to the heart of the Adelaide CBD
- › Provides easy access to community services, superior education and health options
- › Comprises quality retail precincts, recreation facilities, rich heritage and beautiful natural environment
- › Is notable for its vibrant tourism sector which attracts over 1,144,000 day-trip visitors annually, and
- › Is in close proximity to the State Aquatic Centre.

STRENGTHENING THE LOCAL COMPETITIVE ENVIRONMENT

The City of Holdfast Bay takes an active role by enabling economic development to occur through:

- › Creating an attractive coastal destination to live and do business, with a range of lifestyle choices and retail, commercial and industrial opportunities
- › Easy accessibility to major road infrastructure connecting to the Port of Adelaide, national rail links and Adelaide International Airport
- › Strong collaboration through central, southern and western regional Adelaide business development partnerships that foster positive alliances in tourism and economic development
- › Major capital projects planned or proposed totaling an estimated \$500 million
- › Connection to the National Broadband Network and opportunities for future higher speed access in industrial nodes
- › Fostering employment and training opportunities through high quality education facilities
- › Provision of outstanding conference and accommodation venues of an international level
- › Being known as Adelaide's second most visited tourism destination showcasing our heritage appeal and sandy coastline
- › Access to information through the Visitor Information Centre and Bay Discovery Centre and a number of fine galleries and world class sporting facilities nearby



Delivering a
sustainable, well
serviced city through
collaboration
with businesses,
community,
government and
key stakeholders



LOCAL, REGIONAL AND STATE ROLE IN ECONOMIC DEVELOPMENT

The City of Holdfast Bay plays an integral role in facilitating economic growth and sustainability by partnering with community, business and state and federal governments.

Having a collaborative approach advocates for a cohesive and robust economy where shared outcomes can be achieved.

The economic climate Council is creating through its commitment to economic development provides the ability to influence industry investment, stimulate economic growth and adapt and respond to future declining or growth sectors.

Through the development of a well-planned economic strategy, Council's aim is not to work in isolation, but to harness the networks and partnerships actively involved in industry development both locally and regionally.



LOCAL APPROACH

CITY OF HOLDFAST BAY ROLE

Council can enable economic prosperity by influencing and supporting the local business environment. In this space Council has several roles, including provider, advocator, regulator, partner and facilitator.

PURPOSE	ROLE IN ECONOMIC DEVELOPMENT
Provider	<ul style="list-style-type: none">› Development of a well-planned economic strategic plan› Creating initiatives that help grow the local economy› Generating opportunities for supporting and promoting local businesses› Support for new and existing businesses through access to relevant business information› Local infrastructure that facilitates economic activity› Program events that attract visitors to spend and stay in the city
Advocator	<ul style="list-style-type: none">› Undertake reviews of legislative restrictions to business growth› Foster the development of Creative Business Hubs(s) and shared facilities› Lobby state and federal government for infrastructure and major project development› Examine funding and investment opportunities for projects that have a broader economic outcome› Encourage investment attraction through access to data at a local, regional and state level
Regulator	<ul style="list-style-type: none">› Administer the Development Act 1993 that guides new development in South Australia› Govern and administer any local laws and policies that regulate economic activity› In keeping with the 'Small Business Friendly Council Initiative Charter' signed 5 Dec 2017, undertake a commitment to support small business and economic development through good customer service and simplified administration and regulation processes› Access to information on regulatory requirements is clear and concise and accessible to all
Partner	<ul style="list-style-type: none">› Collaborate on a regional level with central, western and southern regional councils to drive and shape the strategic direction of the region› Work jointly with western and southern regional councils for shared economic outcomes particularly, but not limited to, employment, tourism and infrastructure projects› Identify joint initiatives with state and federal government for great economic outcomes
Facilitator	<ul style="list-style-type: none">› Host training and business development opportunities› Examine best practice in seasonal rates and reduction schemes, parking initiatives, cluster development, circular economy and trend analysis› Utilise Council publications and social media to promote and enhance the economic benefits of the city› Capitalise on our tourism advantage to examine new opportunities and potential investment in the city

JETTY ROAD MAINSTREET COMMITTEE

The Jetty Road Glenelg Precinct is recognised throughout South Australia and beyond as one of the best examples of a thriving traditional retail, hospitality and business district. The thriving retail and business precinct services the needs of the local community and intrastate, interstate and international visitors resulting in around two million people frequenting the precinct each year.

Jetty Road Mainstreet Committee (JRMC) was originally established in 1994 and operates as an advisory committee to the City of Holdfast Bay under Section 41 of the Local Government Act 1999.

The objectives of the JRMC is to advise Council on matters that continue to enhance and promote the Precinct as a vibrant shopping, leisure and recreational area for all seasons. The committee provides consistent marketing and brand strategies that further encourage economic development of the Precinct and inspires further commercial investment in the Precinct.

The JRMC recommend a strategic management and financial plan for the Precinct, providing at least a four year horizon for consideration and adoption by Council.



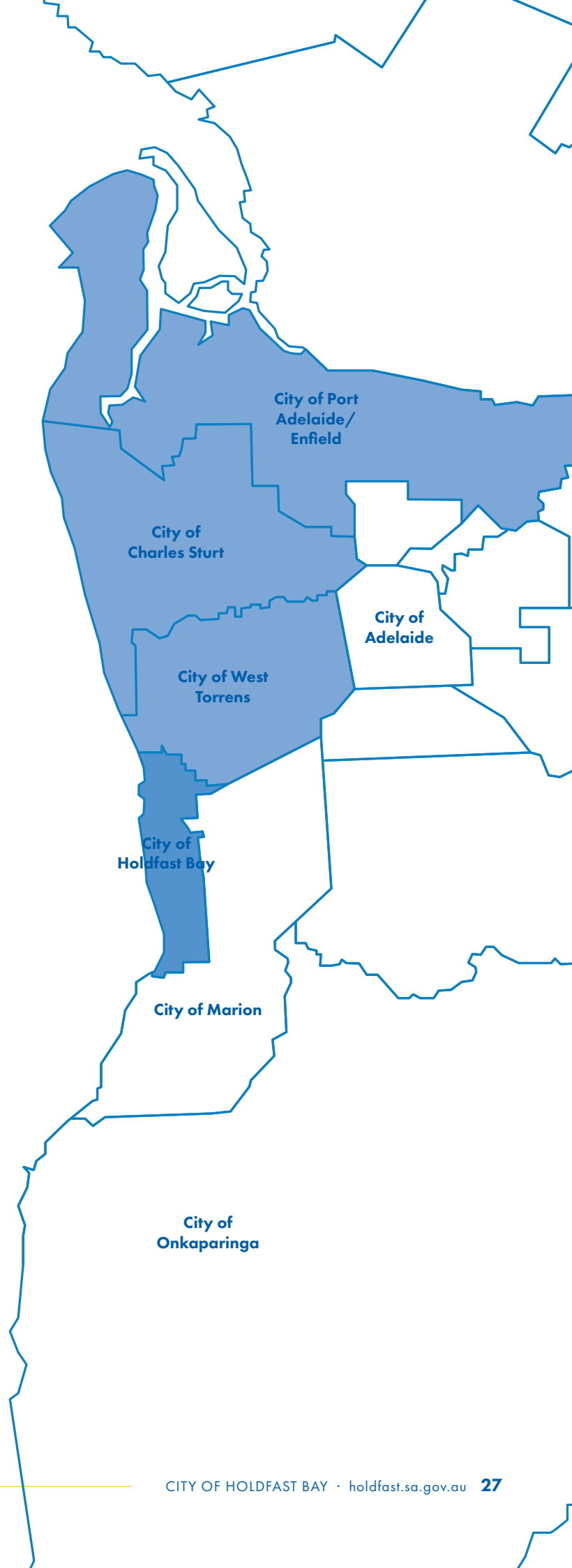
REGIONAL APPROACH

WESTERN ALLIANCE – BUILDING WESTERN ADELAIDE

In November 2015, the Western Alliance was formed between the cities of Holdfast Bay, Charles Sturt, West Torrens and Port Adelaide Enfield. The Chief Executive Officers and key staff from each Council participated in developing the 'Building Western Adelaide Strategy' and subsequently endorsed the strategy with a Memorandum of Understanding for regional collaboration. The strategy identified a number of objectives which seek to facilitate local employment opportunities and economic development outcomes for the Western Region.

The Western Alliance seeks to formally engage with state and federal governments, Western Business Leaders group and other key stakeholders to further develop the Strategy to implement and support many of the initiatives identified.

The population of the Western Region is just over 335,000 (2016), representing just over a quarter of the total Greater Adelaide population. Western Adelaide regional economy represents 22% of the State's jobs (167,000) and 25% of the State's economic output (\$51 Billion).



While manufacturing is declining across the Western Region, the following sectors continue to show strong employment growth:

- › Health Care and Social Assistance
- › Education and training
- › Construction
- › Professional, Scientific and Technical Services
- › Transport, Postal and Warehousing

Tourism continues to flourish in the region and presents real opportunities directly attributing across most industry sectors. A number of joint western region tourism initiatives have been implemented:

- › Development of a Western Regional Tourism Destination Action Plan
- › Development of 'Adelaide Beaches' tourism website
- › Hosting the Women's Australian Open Golf tournament

Western Adelaide's proximity to the Adelaide CBD, Adelaide International Airport and transport networks directly connecting to the Port of Adelaide and national road and rail links strengthens the western region for employment growth and future economic investment.

WESTERN BUSINESS LEADERS

Established by the City of Charles Sturt, the Western Business Leaders (WBL) recognise that boundaries don't stop at a particular local government area and the economy will strengthen if a regional and collaborative approach is adopted. Consisting of industries ranging from health, tourism, manufacturing, sport and recreation and professional and scientific services the membership seek to drive innovation, promote enterprise and grow the local economy.

The WBL aim is to grow, inform, engage and promote solutions for the Western Adelaide business community through:

- › Representing issues to state and federal government
- › Advocating for improvements to the local business environment
- › Providing input to relevant government policies and issues
- › Monitoring the implementation and actions of the Building Western Adelaide strategy
- › Collaboration across regional Western Adelaide Councils and identify issues that Councils and relevant agencies and organisations should pursue



ADELAIDE BUSINESS HUB

As South Australia's inaugural business advisory service, the Adelaide Business Hub provides three key services for small businesses across Adelaide focusing on northern and western Adelaide.

- › Business Incubator: innovation, growth and jobs
- › One on one consulting for business solutions
- › Partnerships with local, state and federal government to deliver projects that benefit businesses
- › The one stop Hub is supported by a team of business experts who are clear thinking, well connected proactive people there to support and assist South Australian businesses.



SOUTHERN ALLIANCE – SOUTHERN ADELAIDE ECONOMIC DEVELOPMENT BOARD

The South Adelaide Economic Development Board (SAEDB) is providing industry leadership to further develop the Southern Adelaide economy, influence decision-making relating to the Southern region that will have a positive impact on the future of the region.

The SAEDB works in partnership with local business support agencies, state and local government to foster business growth and opportunities for the southern region. The SAEDB's main objectives are to:

- › Collaborate and advocate throughout government, business, education, community and not-for-profit organisations to realise the full economic potential of the unique region
- › Build on the region's competitive advantages by supporting innovation and diversification in the local economy

SOUTHERN ADELAIDE BUSINESS ADVISORY SERVICE

The South Australian Department of State Development has jointly contributed \$240,000 for the Southern Adelaide Business Advisory Service (SABAS) with the Cities of Marion and Onkaparinga. The SABAS provides a range of business advisory services aimed at assisting businesses to develop and grow who are located in the cities of Holdfast Bay, Marion, Mitcham and Onkaparinga over a two year period.

The free confidential one-on-one advisory services for new and existing businesses provides information and advice on:

- › Starting a business
- › 'Business Health Check' for existing businesses
- › Business planning
- › Growth services, including mentoring and coaching to business intenders, managers and owners



STATE & FEDERAL APPROACH

THE DEPARTMENT OF STATE DEVELOPMENT

The South Australian Government, through the Department of State Development plays an essential role in the development of industry, business and communities to identify and capitalise on opportunities for job creation and economic growth.

The City of Holdfast Bay along with our Western and Southern economic regional alliances advocate the State Government to ensure that economic growth continues to prosper within the state and region.

The capabilities of bringing together expertise across government has enabled the State Government to attract international investors across a number of diverse sectors.

Adelaide, rated continually in the top five most livable cities in the world, has created opportunities in attracting investment, improving industry competitiveness and a demand for driving education to ensure a skilled workforce is available to support the growth industry sectors and lifestyle choices for employment.

Most recently the State Government has created industry road maps and skills development and engagement frameworks that reflect an emphasis on innovation, science and technological advances and collaborative approaches.

REGIONAL DEVELOPMENT AUSTRALIA

Regional Development Australia (RDA) is an Australian Government initiative that aims to enhance growth and strengthen the regional communities of Australia and plays a pivotal role in ensuring sustainability of Australia's regions.

In South Australia, Regional Development Australia is a partnership between the Australian Government, South Australia and the Local Government Association of South Australia on behalf of its members.

The Regional Development Australia initiative is delivered through 55 entities nationally, with 8 entities (i.e. 7 regional and 1 Adelaide metropolitan) established in South Australia.

The RDA Adelaide region, encompassing the City of Holdfast Bay is serviced by Regional Development Australia Adelaide, which is funded solely by the Australian Government.

BUSINESS.GOV.AU

The online government resource for the Australian business community www.business.gov.au offers access to all of the government information, assistance, forms and services. It's a whole-of-government service providing essential information on planning, starting and growing a business.



HOLDFAST BAY DEMOGRAPHICS AND ECONOMIC PROFILE

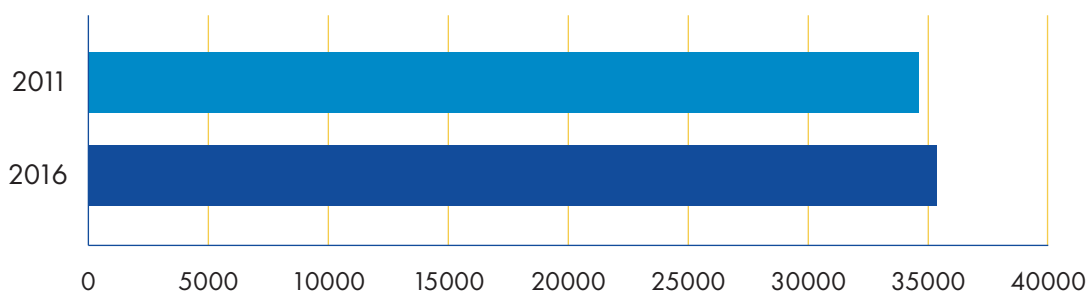
DEMOGRAPHICS

Population: 35,360

Population and population growth is important economically as it drives demand for local goods and services. This supports small business sustainability and provides jobs and training opportunities for residents and their families.

The total population of the City of Holdfast Bay at the 2016 Census was 35,360 people of whom 52.4% were female and 47.6% male. This is an increase of only 2.1% over the five years from 2011 compared to South Australia's population growth over the same period of 3.05%.

Census Population: 2011, 2016

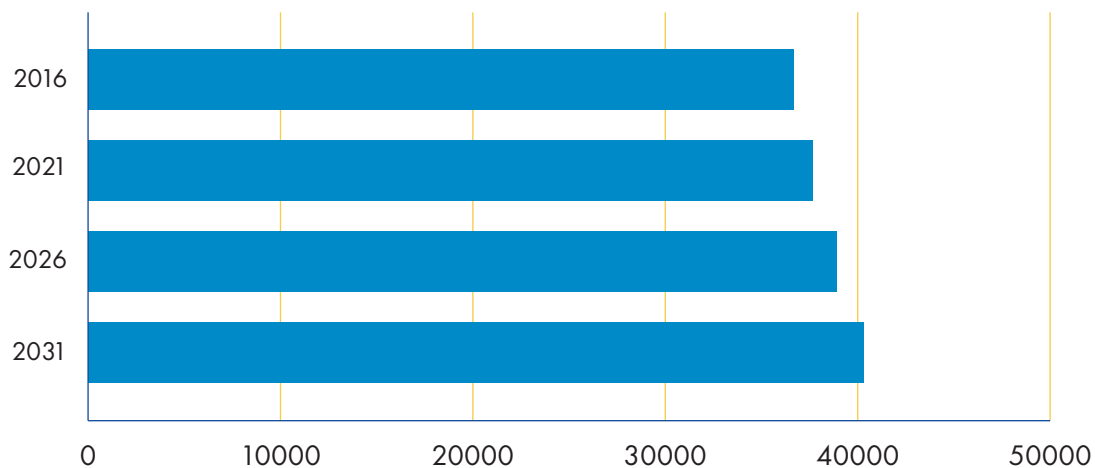




Projected Population Growth: 10%

The South Australian population is expected to grow by over 7.7% from 1.67 million today to over 1.8 million in the next twenty years, an estimated growth rate of 7.8%. The population of the City of Holdfast Bay is also expected to increase and ahead of the State at around 10% over this period, to over 40,000 residents by 2031².

Projected Population: 2016-2031

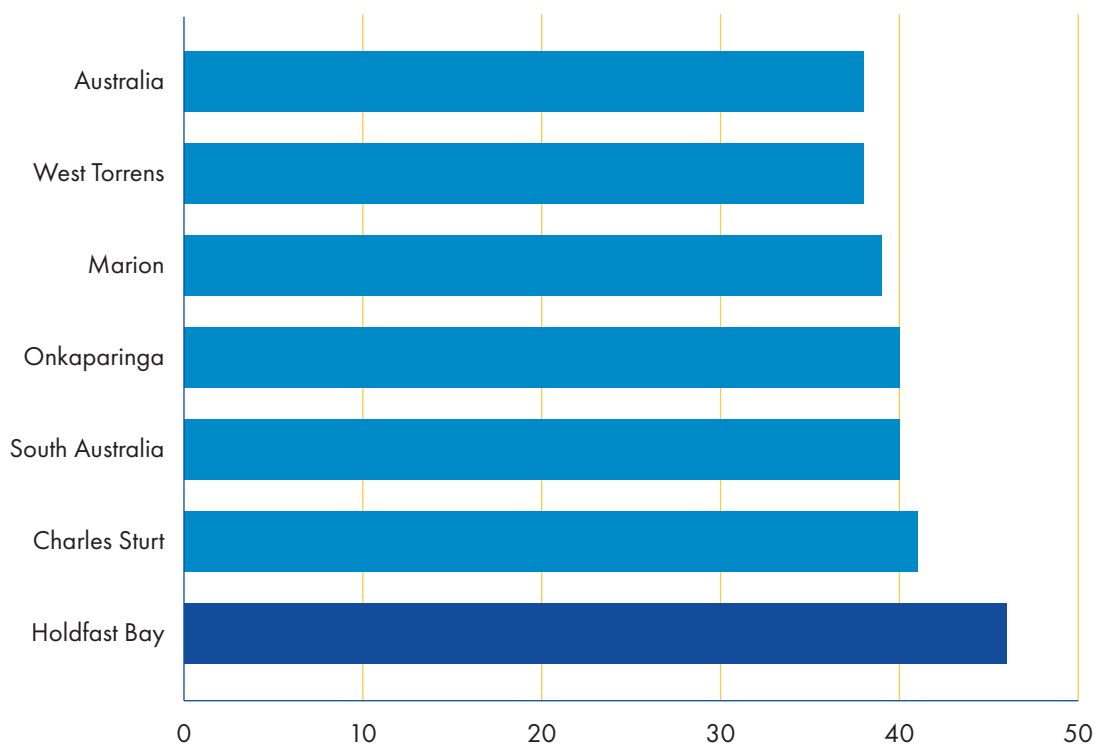


² DPTI population projections https://infogram.com/42600_projectedpopulation

Population Profile: Median Age 46

Our population is however ageing. South Australia has a higher proportion of people aged over 55 than the rest of Australia, and the median age of a City of Holdfast Bay resident is 46, which is significantly older than the surrounding areas and the state and national average (Australia 38, West Torrens 38, Marion 39, Onkaparinga 40, South Australia 40 and Charles Sturt 41). Again, this is important as it means that there are fewer people in the key working age groups contributing to supporting the older population. The chart below shows the median age for these areas.

Median Age – Census 2016

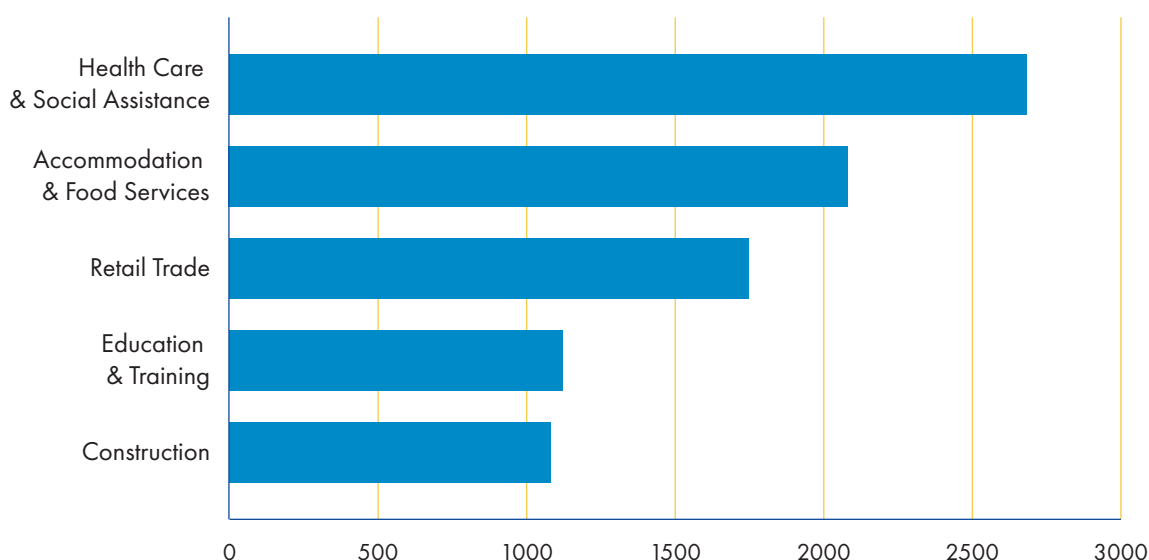


As time passes, an increasing share of our population will be aged over 65. While around 70 per cent of households in the Council area consist of one or two people, projections also indicate the number of families living in the area will grow over the next 20 years.

Employment: 12,959

The total number of Holdfast Bay residents employed at the 2016 Census was 16,172. This compares to 12,959 jobs that were available in the council area. Since 2011, the jobs available in Holdfast Bay have increased by 16% whereas the number of working residents has fallen by 3.8%. Holdfast Bay now has 12.3% of all the jobs in Southern Adelaide up from 11.8% in 2011. The largest employment sector in the City is health care & social assistance at 22% followed by accommodation & food services with 16%. Over the last five years to 2016, the largest increase in jobs has been experienced by the construction sector growing by 59% with education & training increasing by 28%. The five largest employment sectors are shown below.

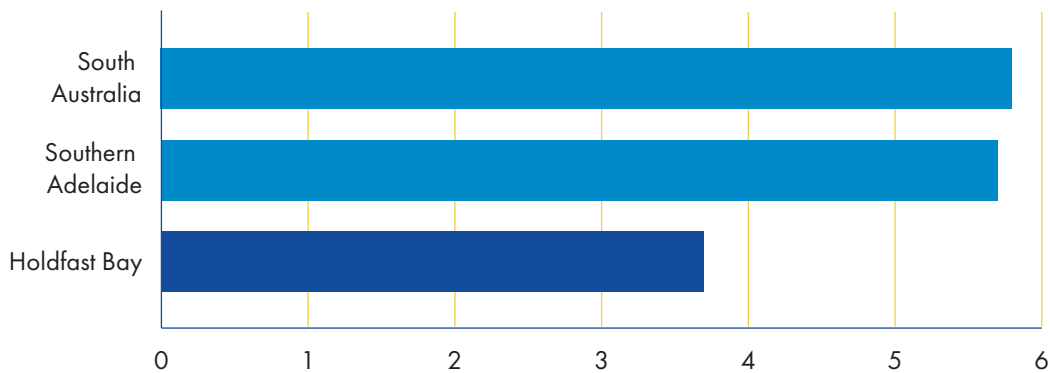
Jobs: Census 2016



Unemployment: 3.7%

Holdfast Bay has typically been fortunate to have a lower unemployment rate than the State average and the latest figure as at December 2017 was 3.7% compared to 5.8% for South Australia and 5.7% for Southern Adelaide as a whole.

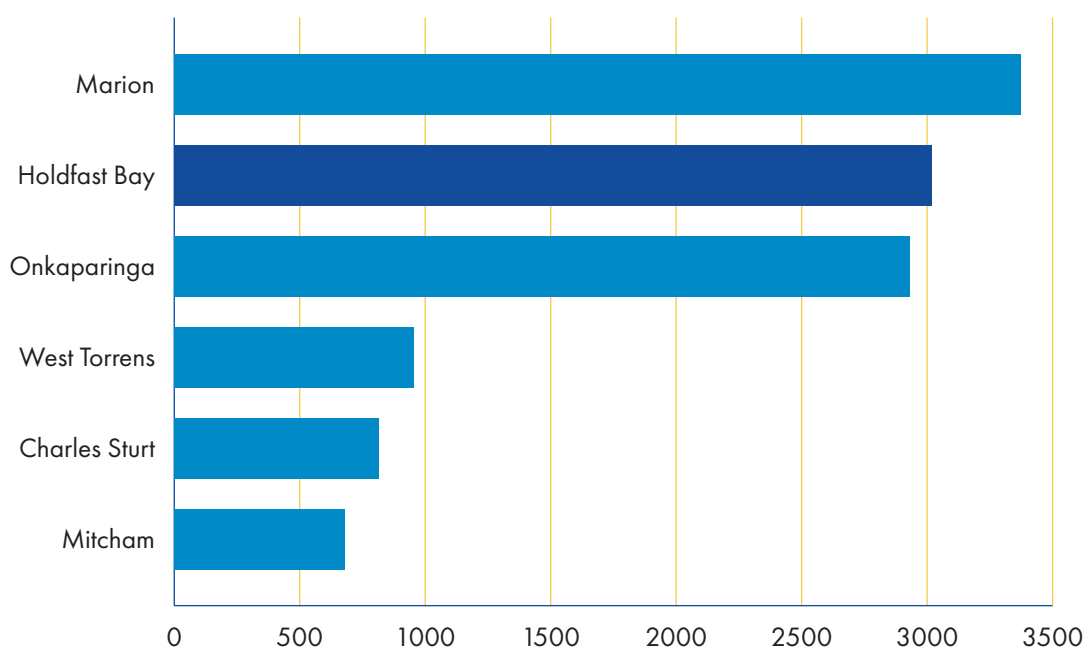
Unemployment Rate – December 2017



Commuting Patterns: 3,017 residents work and live in Holdfast Bay

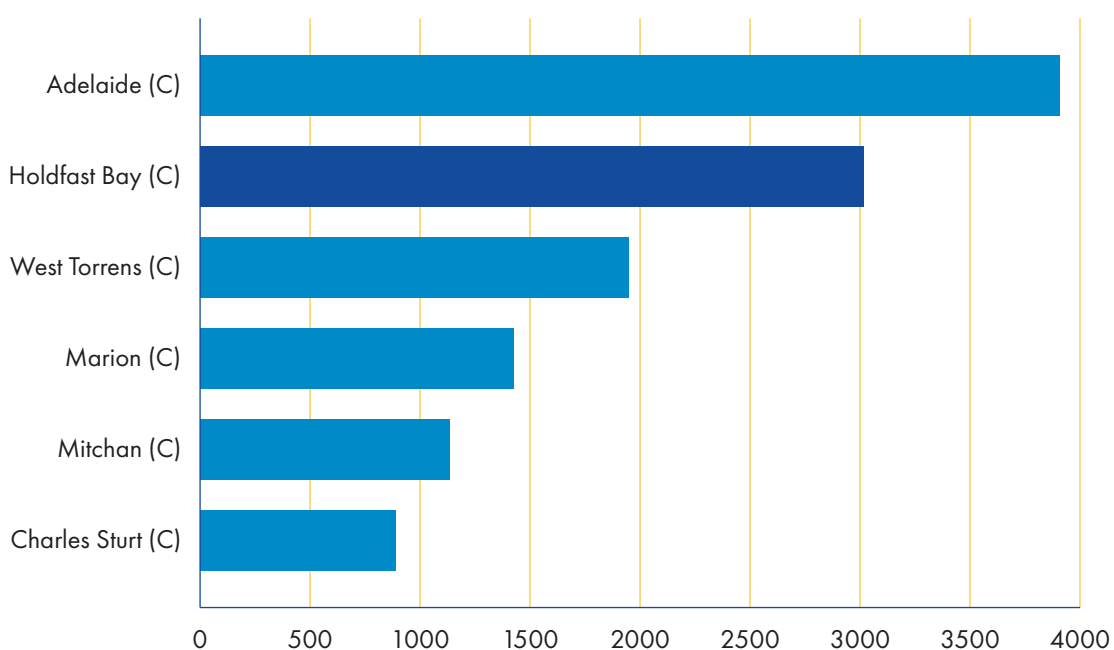
Of the 12,959 people who work in Holdfast Bay, only 3,017 live in the council area. The majority commute from other local government areas with Marion and Onkaparinga providing the largest number of workers at 3,374 and 2,931 respectively. The chart below shows the top six council areas providing workers for Holdfast Bay.

Jobs – LGA of usual residence



Conversely, the majority of the 16,172 Holdfast Bay working residents commute to other council areas for employment. The largest number, 3,907, travel to Adelaide with West Torrens, Marion, Mitcham and Charles Sturt joining Holdfast Bay in the top six working destinations.

Working Residents – LGA of employment





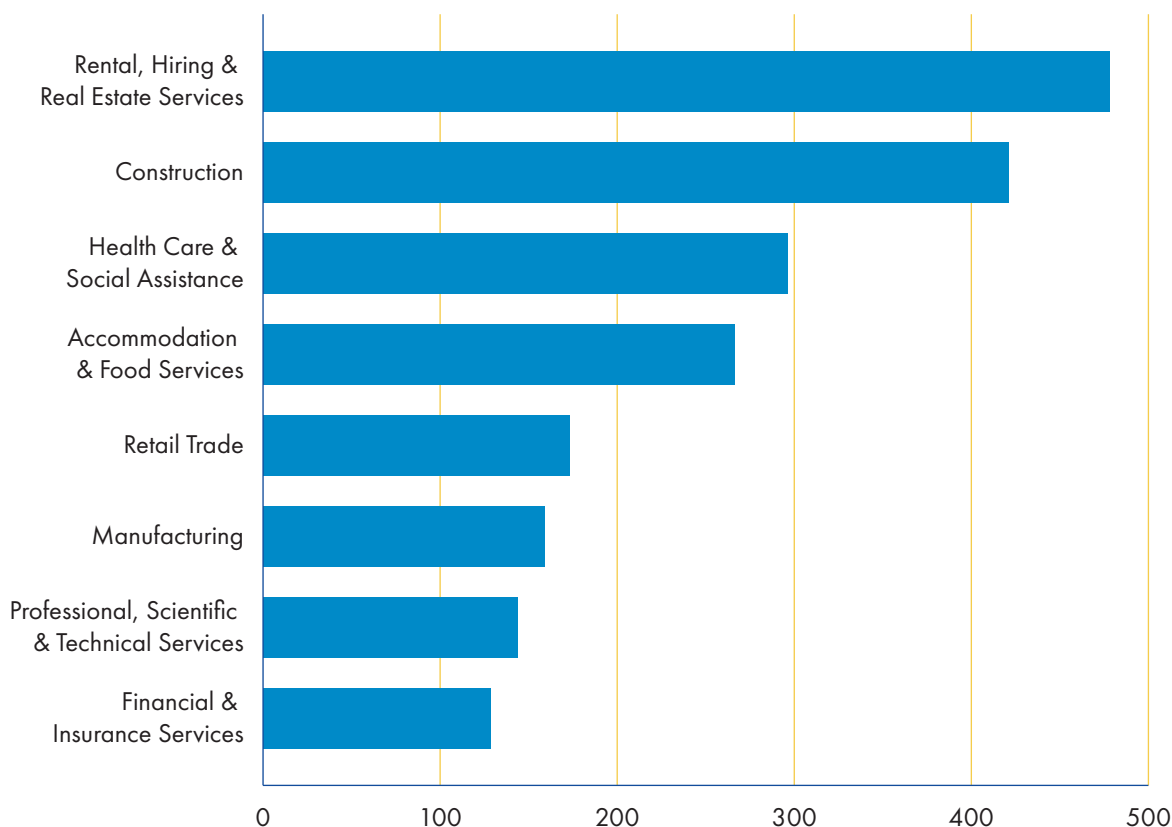
ECONOMIC PROFILE³

Output: \$2.67 billion

The annual output (total sales) generated by businesses and organisations in Holdfast Bay is estimated at \$2.67 billion. Over 75% of this revenue is generated by 8 sectors with the top four being rental, hiring & real estate services, \$478 million; construction, \$421 million; health care & social assistance, \$296 million and accommodation & food services, \$266 million.

Total annual output in Southern Adelaide is estimated at \$24.7 billion and Holdfast Bay represents 10.8% of this figure and 1.3% of South Australia's total of \$206.8 billion. Output for the top 8 sectors is shown in the chart below from which it can be seen that, although manufacturing has been in decline for some time, it still generates some \$158 million in annual output or 5.9% of the City's total.

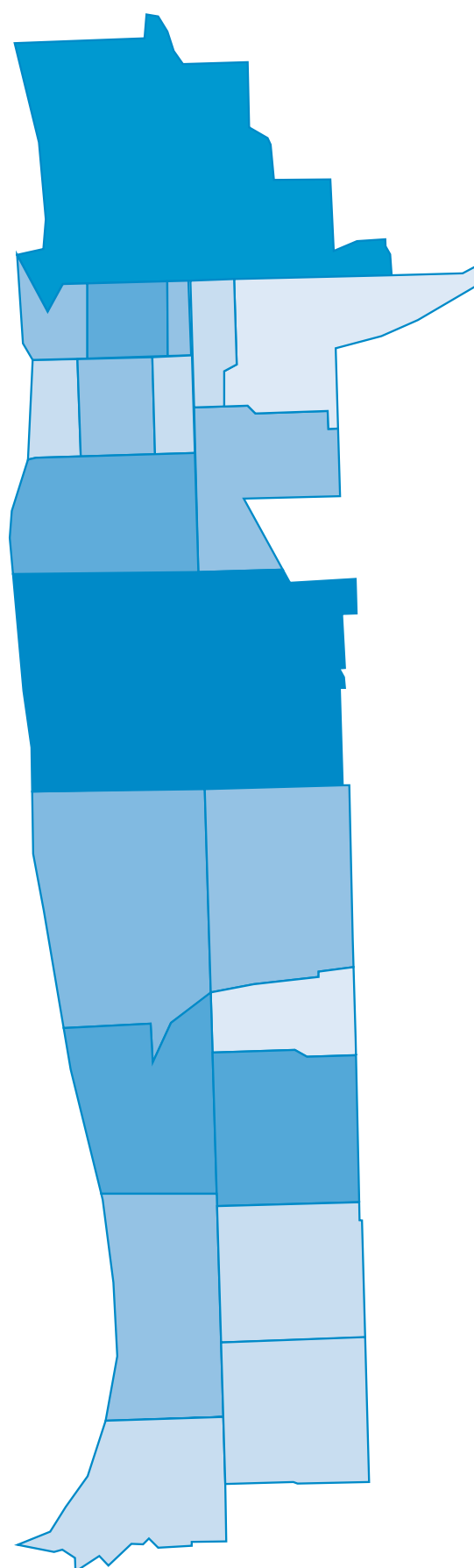
Output (\$M)



³ Figures for Output, Tourism, Regional Exports and Gross Regional Product are derived from REMPLAN Economy analysis using data sourced from, ABS 2016 Census Place of Work Employment, ABS 2014/2015 National Input/Output Tables, ABS June 2017 Gross State Product.

The following map illustrates the concentration of output from businesses located in the various destination zones across the council area⁴. The Somerton Park area is the largest in the council area and contributes \$546 million in annual output which is approximately 20% of the total.

Density of output by destination zones

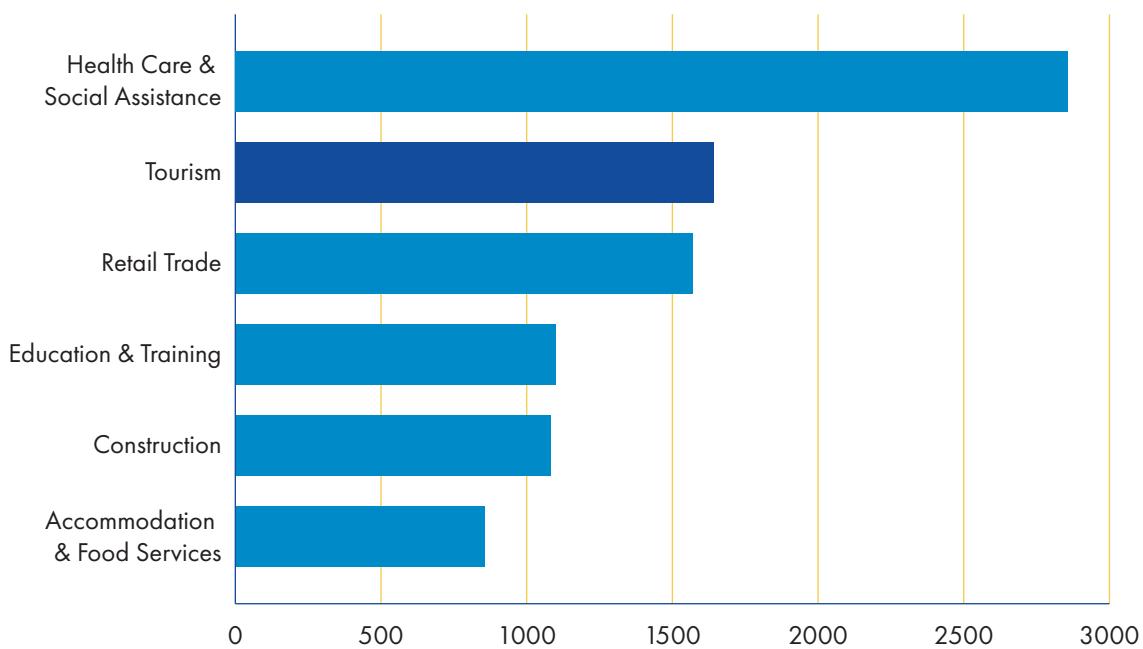


⁴ Destination zones are created by the relevant State Government and are used by the ABS for allocating Place of Work data

Tourism: 1,643 jobs

Tourism (visitation) is an amalgam of activities across various industry sectors such as retail, accommodation & food services and arts & recreation services. Tourism Research Australia have estimated the value contributed by various sectors to the tourism (visitation) sector and using this methodology and from this, it has been estimated that tourism contributes \$252 million of output for the Holdfast Bay economy and employs 1,643 people. This places it as the fourth largest sector by output and second largest by employment in the council area. The majority of this output and employment is in the accommodation & food services sector. The following chart illustrates the importance of tourism jobs to the Holdfast Bay economy.

Tourism jobs

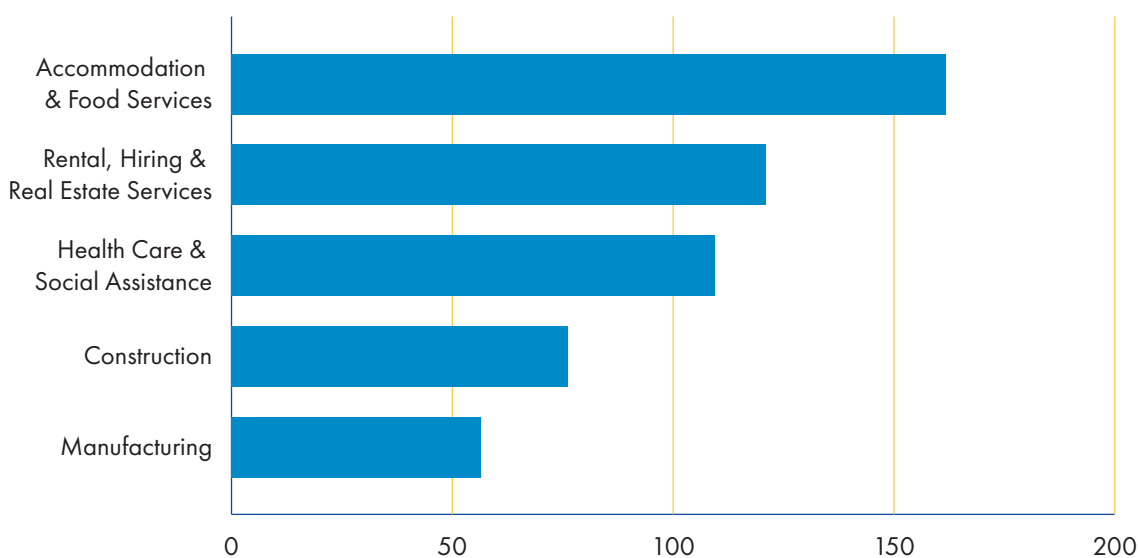


Regional Exports: \$722 million

Regional exports represent the value of goods and services which are sold to consumers, businesses and governments based outside the City of Holdfast Bay's boundaries. Another way of defining exports is as an inflow of money into the region, e.g. motels have an inflow of money from people who live outside the region's boundaries thus they are earning export dollars. No distinction is made between domestic and international exports. Exports are critical to the health of a regional economy as they bring money in from outside and these export businesses, in turn, spend money with other local goods and service providers.

The total regional export estimate for Holdfast Bay is \$722 million per annum. Accommodation and food services is the largest contributing sector at \$161 million or 22% of the total followed by rental, hiring & real estate services and health care & social assistance. The chart below shows the top five regional export sectors.

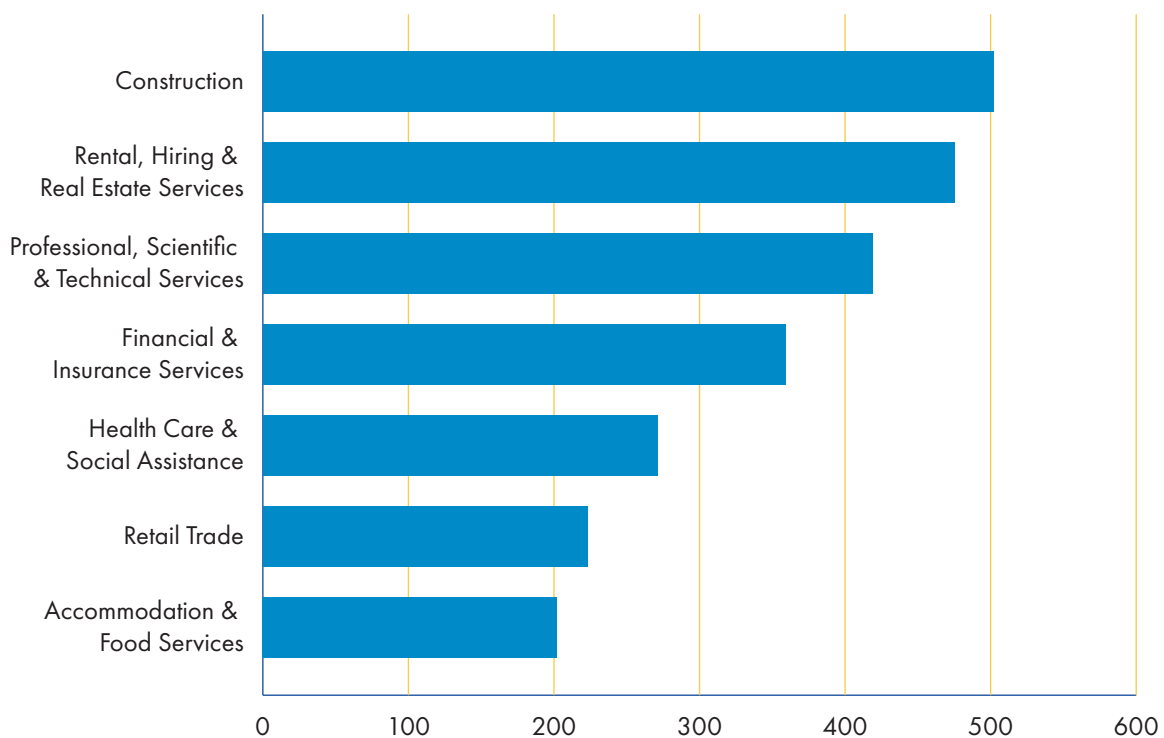
Regional exports (\$M)



Number of Businesses: 3,271

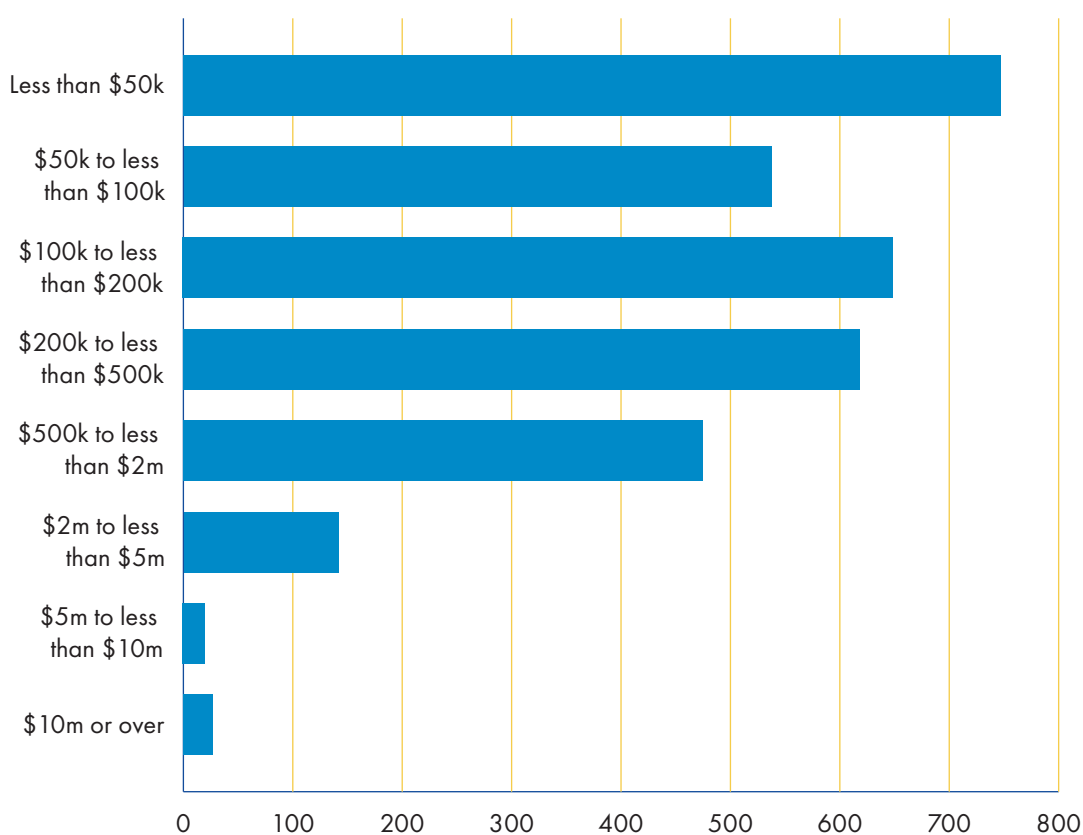
The latest business count data from the ABS estimates that at 30 June 2017 there were 3,271 actively trading businesses registered in Holdfast Bay. 75% of these were in 7 sectors, shown below with the three largest being construction, 502 businesses; rental, hiring & real estate services, 475 businesses and professional, scientific & technical services, 419 businesses.

Number of businesses by sector, June 2017



Most of these businesses are small or very small with 97% employing less than 20 people and 79% having a turnover of less than \$500,000. The breakdown by turnover is shown below.

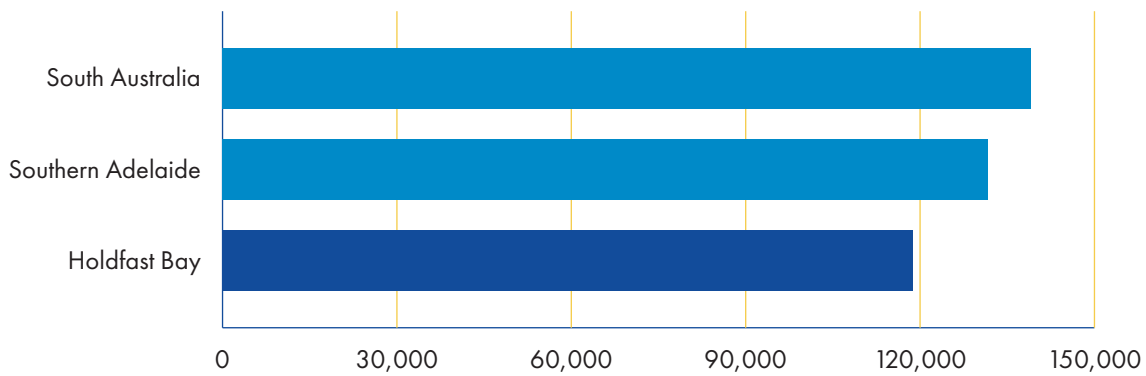
Number of businesses by turnover, June 2017



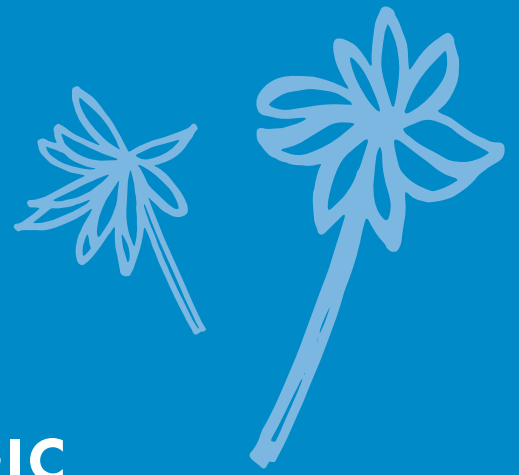
Gross Regional Product: \$1,539 million

Total Gross Regional Product (GRP) for Holdfast Bay is estimated as \$1,539 million and represents 11.1% of Southern Adelaide's GRP and 1.48% of South Australia's Gross State Product. GRP per worker however is relatively low at \$118,811 compared to \$131,698 for the region as a whole and \$139,116 for the State.

Gross Regional Product/Gross State Product per worker (\$)







INFORMING OUR STRATEGIC PRIORITIES

The City of Holdfast Bay takes an active role in identifying the future needs and aspirations of businesses located in the City.

Businesses have a key role to play in shaping the future of employment, access to goods and services, co-location and clustering of businesses and expand the range of amenities and vibrancy of a retail precincts.



Intuito Market Research was engaged to conduct the biannual business confidence survey across all industry sectors in Holdfast Bay during October 2017. They are a consultancy with extensive experience in the design and implementation of research projects and has worked closely with the City of Holdfast Bay on the city's Quality of Life survey and undertaking the 2014 Business Confidence survey.

The survey is vital in understanding the short, medium and long term goals of business and build on information provided by businesses. A summary of the findings from 330 businesses across the whole of city in most industry sectors provided the following information to inform actions within the Economic Activation Plan:

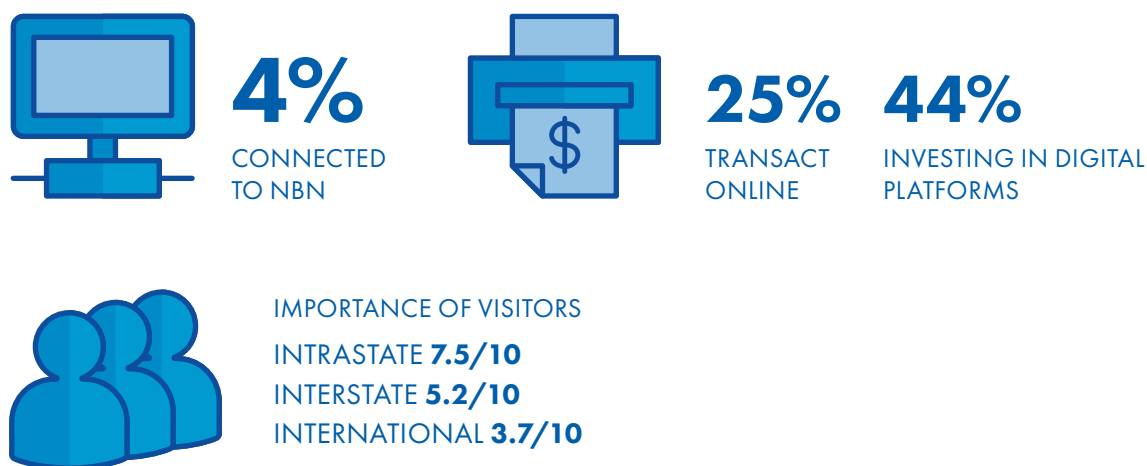
SUMMARY OF THE BUSINESS CONFIDENCE SURVEY 2017:

Who did we survey?



AVERAGE TIME IN BUSINESS **15 YEARS**

What did they tell us?



PROFITABILITY



75%

THINK THERE IS A DECLINE
IN RETAIL PROFITABILITY

Investing in E-Commerce and Digital Platforms

Those who do not invest online (51%) were more likely described as having been in business for 6-10 years (59%), with incomes under \$500,000 pa (59%) and in the accommodation and food services sector (65%) and retail trade (57%). Those who were more likely to invest (44%), had been in business for over 20 years (58%), were a medium sized business (47%), with turnover between \$500,000 pa and \$50 million pa (67%), and were from the transport, postal and warehousing (86%*), rental, hiring and real estate services (54%*), professional, scientific and technical (56%), information media and telecommunications (54%*), construction (54%), manufacturing (50%*) and administrative and support services (50%*) sectors.

What we know so far from the survey:

- › Energy consumption is impacting businesses
- › Intrastate visitors are seen as very important to our local retail economy, more-so than interstate and international visitors
- › Businesses aren't keeping pace with the digital economy
- › Businesses would like Council to provide more training and networking opportunities

POWER COSTS

MOST PROMINENT FACTOR
AFFECTING PROFITABILITY

PLUS

COST OF LABOUR, COST OF
RENT, LACK OF SALES AND
LOW MARGINS



* Small sample size

Relationship with Council

- › Only 19% of businesses surveyed had done business with Council, however rated their experience highly
- › There was a disconnect with responses on what Council provides (eg. Power, high rental and business disruption)
- › Business optimism improved substantially from Quarter 4 2014 to Q4 2017
- › Council's support for business was rated at 5.2 satisfaction sighting the following as issues:
 - › Parking/traffic
 - › Marketing (advertising, business networking, events)
 - › Supporting business better
 - › Liaise more and less business disruption
 - › Reducing costs (power, rates and rents)
 - › Promoting the region as a destination



19%

CONDUCTED BUSINESS
WITH COUNCIL IN THE
LAST 12 MONTHS

7.3

AVERAGE
RATING OF THE
EXPERIENCE

5.2

AVERAGE RATING WITH
COUNCIL'S SUPPORT
FOR BUSINESS



Local Comparison for Quarter 4 (Q4)

There have been improvements in many KPIs over the past 3 years for local businesses.

In 2014 the only positive indicator was selling prices and now we see general business conditions, total sales, selling prices, profitability and number of employees.

KPI	Q4 2014	Q4 2017	
General business conditions	42.0	55.3	↑
Total sales/revenue	43.8	57.61	↑
Average wages	62.3	61.23	—
Non-wage labour costs	68.6	63.2	↑
Selling prices	53.6	54.9	↑
Profitability	36.7	50.2	↑
Number of employees	45.4	51.4	↑
Overtime worked	44.8	54.7	↑
Investment in buildings and structures	43.2	44.9	—
Investment in plant and equipment	49.3	46.9	↑

Business Confidence

- › Confidence is down compared to the national index and level of worry is considerably higher with local medium sized businesses in the local area expressing far more worry than small businesses
- › Accommodation and food services show greater worry
- › Retail on par with national average



53%

OF LOCAL BUSINESSES
FEEL CONFIDENT ABOUT
THEIR PROSPECTS FOR
THE YEAR AHEAD



24%

ARE FEELING
WORRIED

Prime Business Concerns

- › Costs or overheads most dominant
- › Economic climate
- › Lack of work or sales
- › Cash flow, bad debts or profitability
- › 9% of business in the local area claim no problems
- › Same concerns nationally



PROBLEMS & CONCERNS

COSTS OR OVERHEADS

ECONOMIC CLIMATE

LACK OF WORK OR SALES

CASH FLOW, BAD DEBTS OR
PROFITABILITY

BARRIERS TO HIRING

ONE THIRD

DON'T NEED MORE STAFF



TWO THIRDS

SAY COST, LACK OF WORK/SALES,
FINDING QUALITY STAFF AND
PROFITABILITY PROHIBIT HIRING

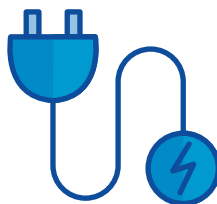


Retail Sector Profitability



75%

THINK THERE IS A
DECLINE IN RETAIL
PROFITABILITY



POWER COSTS

IS THE MOST PROMINENT FACTOR
AFFECTING PROFITABILITY
FOLLOWED BY COST OF LABOUR,
COST OF RENT, LACK OF SALES
AND LOW MARGINS



HOLDING STOCK

15%

MORE

64%

SAME

21%

LESS

MAIN REASON - SUMMER &
CHRISTMAS

REASON FOR LESS IS CASH
FLOW, ECONOMY OR REDUCED
WORKLOADS

General business issues

- › Exposure
- › Flow, fewer people on the street compared to last couple of years
- › Having to contend with overseas business influences
- › Knowledge of Chinese market to attract more visitors to Glenelg
- › Lack of funding
- › Lack of promotion and innovation
- › Lack of foot traffic in Jetty Road and Marina
- › Obtaining credit support from banks
- › Old technology
- › Winter

CONCLUSION

- › Satisfaction with the National Broadband Network (NBN) roll out has been low
- › E-Commerce and online trading is a feature for many businesses with only a quarter of businesses saying they are transacting online and these businesses are likely to be retail or accommodation and food services.
- › 44% of all businesses surveyed claim to be investing in eCommerce or digital platforms to aid business transactions. (Those more likely to be investing are not the food services or retail enterprises rather they are medium sized businesses in all other industry sectors).
- › Visitors to the area are important particularly intrastate for repeat purchase opportunities and there is a desire for Council to do more to attract visitors to help business with sales and revenue as a flow on effect.



poolwerx
for healthy pool people

poolwerx
for healthy pool people

PARINGA AVE

PARKING AT REAR



1 YEAR
WRANTY

CASH
FOR
CARS

FINANCE
AVAILABLE*

SALE

CASH
FOR
CARS

poolwerx
for healthy pool people
OPEN

UNBEATABLE
PRICE

FINANCE
AVAILABLE

DANGER
DO NOT GO ON ROADS
HIGH PRESSURE GAS
PIPELINES IN VICINITY
SEEK PROFESSIONAL
ADVICE

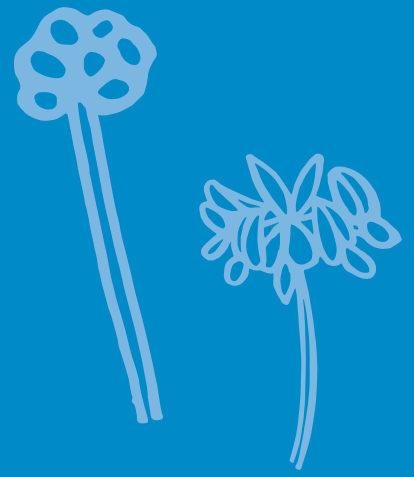
SALES

TAKE
THE
LEAD

POOLING

POOLING
CARS
OWNERS

OUR CHALLENGES AND OPPORTUNITIES



Economic development is not widely understood by the community at large and as reported earlier can be defined through standard of living and creation of jobs, attracting and maintaining business activity and the support of innovation.

Our experiences represent the key unique selling points of the region and under-pin the tourism industry of Holdfast Bay

STRENGTHS OF HOLDFAST BAY

Nestled between southern and western Adelaide and only 20 minutes from Adelaide central business district (CBD), the city has access to South Australia's best education and training facilities with Flinders University on our doorstep located at Tonsley Innovation District. Flinders at Tonsley is designed for businesses and students to interact, with researchers available in areas such as engineering, medical devices and nanoscale technologies.

Flinders Innovation Centre, a node of the South Australian Government's Manufacturing Technologies Centre is available for businesses, innovators and educators to create prototypes, parts and injection molding tools with precision.

Tourism plays a major role in our economy attributing to an economic output of \$253 million and accounting for 1,643 (2017) jobs across the Accommodation and Food, Administrative and Support, Arts and Recreation and the Retail sectors.

INDUSTRY SECTOR	% OF TOURISM ACTIVITY
-----------------	-----------------------

Accommodation & Food Services	60.80%
Administrative & Support Services	20.94%
Arts & Recreation Services	18.04%
Retail Trade	10.67%

Source: 2015-16, Australian Bureau of Statistics (ABS), Tourism Satellite Account

The Health and Social Services sector remains strong accounting for almost a quarter of our workforce with 2,491 (Dec 2016) jobs. Figures for 2016 (ABS) indicate the median age of people in Holdfast Bay was 46 years. People aged 65 years and over made up 23.9% of the population, with people aged 50-85 years and over above the state average. Technological and digital advances in the Health and Social Services sector will provide opportunities for growth and development of new businesses and a new way of delivering services to the community.



STRENGTHS SNAPSHOT

Recognising tourism as a strength & opportunity

Tourism is a key economic driver for Holdfast Bay that has significant positive flow-on effects for the local community. In 2017, tourism contributed \$253 million to the local economy, providing an estimated 1,643 full time equivalent jobs.

Within the EAP, tourism is outlined as one of the key strategic objectives of economic development through focusing on Council's Economy pillar highlighted in the Strategic Plan 'Our Place 2030'. Council's strategic plan emphasis is on boosting our visitor economy through the following objectives;

1. Implement the City of Holdfast Bay Tourism Plan 2020 strategic priorities
 2. Implement Western Alliance Tourism Destination Action Plan
 3. Develop City of Holdfast Bay Tourism Destination Management Plan
 4. Develop a Visitor Servicing Strategy
- 



Through this strategic approach Council has the ability to attract investment and major events to Holdfast Bay and build great resilience in our economy. Tourism is already a significant economic driver of the South Australian economy with Holdfast Bay the second most visited area outside the Adelaide central business district. In 2017 6.3 million overnight visitors spent \$6.6 billion in South Australia across 17,000 tourism businesses, directly employing 36,700 South Australians.

Holdfast Bay recognises that successful tourism requires strategic planning where visitors' expectations are balanced against the needs of residents and ensures local amenity or the natural environment is not compromised. Retail remains the third largest employer accounting for 13.5% of the Holdfast Bay workforce and plays an important role in the local and visitor economy and adding to the vibrancy of the city. The City has four significant retail centres each offering their own unique coastal appeal. Jetty Road Glenelg and Marina Pier Glenelg being the most visited centre outside of the Adelaide CBD provides for a unique visitor experience while catering for local residents. The quaint areas of Broadway Glenelg South and Jetty Road Brighton provide a blend of café culture, local art and tourism product all within minutes of pristine coastline.

Regional partnerships through the western Adelaide Councils Alliance has seen the development of the Adelaide Beaches brand and launch of www.adelaidebeaches.com website linking to the best address in west where the sun sets on the sea. Businesses in the tourism industry now have a dedicated business and tourism directory showcasing western Adelaide coastline tourism assets and linking through the national tourism data warehouse.

Maintaining vibrant and sustainable centres and ensuring commercial vacancy rates remain low, is key, particularly with fluctuating seasonal demand of our retail centres. The EAP encompassing the Tourism Plan 2020 is facilitating programs and projects to fulfill unmet needs and utilise data to identify supply chains and opportunities within the Asian tourism market and create holiday packages in off-peak seasons and create event opportunities for winter activation.

CHALLENGES FOR HOLDFAST BAY

Our challenge will be to ensure the city is able to adapt to the shift in focus of traditional economic drivers and not rely on current sectors to maintain our quality of life. How we do business in the future will depend on how well equipped we are now and invest in knowledge intensive industries, services for an ageing population and acclimatise to demands on space, zoning considerations, commuter trends and global warming particularly as a coastal city.

CHALLENGES

CITY OPPORTUNITIES

Rapid pace of technological change and digitisation of the economy

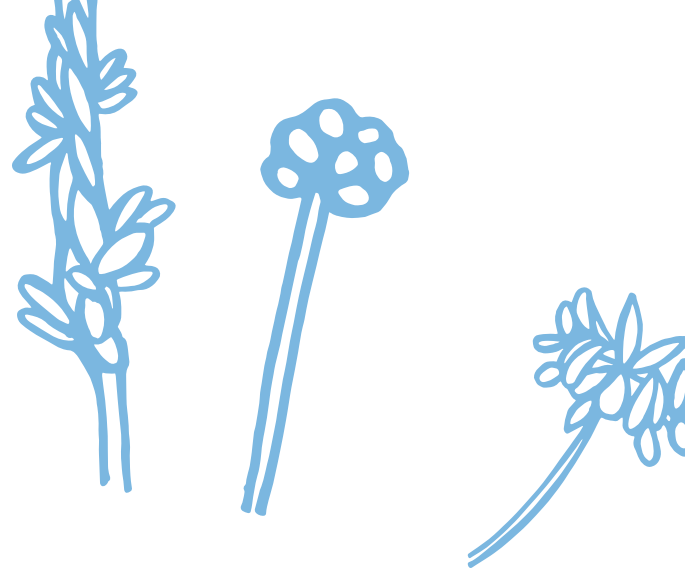
- › Embrace Smart City thinking
- › Strengthen the competitive advantage of the local economy
- › Attract investment via new, innovative businesses with a strong emphasis on digitisation and Industry 4.0
- › Ability for intercultural communication
- › Access to health services through the use of technology for disability services and our growing aged population
- › Ensuring education and training is supporting the technological advances in new employment areas
- › Diversification in employment fields
- › New technologies to invest in skills

Globalisation

- › Access to a world market
- › Import and export opportunities in countries previously not trading in
- › Linkages with universities
- › Secondary schools and training providers to develop workforce skills base

Economic disruption

- › Ability for more people to operate a business
- › Access to global trading
- › Prepare businesses to be resilient and adaptable to change
- › Developing and supporting entrepreneurship through programs, technology and available space



**Parking availability
(actual and perceived)**

- › Embrace latest technology to monitor and assess visitor movement in and out of the city
- › Invest in smart car technology and access to clean car electric points throughout the city
- › Provide and promote shared vehicle spaces across the city

Zoning restrictions

- › Preservation of the small industrial area of Somerton Park to cater for emerging industries
- › Assess mix land use as homebased businesses increase

Access to high speed internet

- › Invest in infrastructure for cluster development in industrial area
- › Advocate for reliable access to high speed internet for businesses
- › Installation of wifi across the city for the community and businesses as a welcoming place to do business and stay and play

Land availability

- › Adopt a housing strategy that reflects future living trends
- › Educate businesses on the circular economy and the benefits of clustering and shared resources

Seasonality of demand

- › Ability to sell product or services outside of seasonal demand through the adoption of technology
- › Utilisation and diversification of workforce skills to tap into new markets during off-peak demand
- › Create an off-peak brand for the city

Reducing the impact of rising energy prices and climate action

- › Establishing a leadership position on climate change (in both an SA and national context)
- › Reducing operating costs of the Council through energy efficiency and increased uptake of renewables
- › Improving the efficiency of the local economy through reduced energy bills, water/waste costs
- › Capitalising on the opportunities for local organisations to share resources and capacity, resulting in reduced costs and risks

OPPORTUNITY SNAPSHOT

Digitising the local economy





The global economy is experiencing a wave of innovation at a pace and scale never seen before. Emerging technological advancements in the Internet of Things (IoT) have enabled seamless connectivity between the physical world and the virtual world, enabling us with unparalleled levels of control and communications capability. New artificial intelligence techniques for collecting and analysing large volumes of data (Big Data) are improving our ability to make real-time decisions. Blockchain platforms are revolutionising monetary transactions, and enabling unparalleled levels of transparency across the supply chain. Virtual reality and augmented reality technologies are redefining user experiences and relationships between the business and the customer. Driverless electric vehicles are expected to disrupt traditional modes of transport and transport services, and ultimately redefine transport planning for cities.

Dubbed Industry 4.0, this trend of technological advancement is often referred to as the 'Fourth Industrial Revolution', and just like the previous Revolutions, will redefine what it will mean to live, work and create value as a business and community in Holdfast Bay, with the ultimate objective of creating a step-change improvement in the economic, social and environmental wellbeing of our local economy. Digital infrastructure, via super-fast broadband, will be core to the City's push for embracing Industry 4.0. It is predicted that Australian consumers will need approximately 200GB transfer speeds by 2020 and potentially five terabytes (TB) by 2030.

Digital hubs and innovation technology precincts built on this core infrastructure will provide local businesses with the physical and virtual infrastructure to increase their knowledge base and build capabilities and capacity. For example the Tonsley Innovation District brings together leading-edge research and education, established businesses and start-ups, business incubators and accelerators as well as government and the wider community to connect and collaborate in Australia's leading innovation district. Opportunities exist for our local secondary schools to link with local businesses through integrated pathway programs.

Libraries have gone beyond traditional literacy and have very much focused on becoming information, technology and digital hubs. It is estimated there are almost 13 million users of libraries across Australia including communities, schools, universities, TAFEs, government departments, research agencies, and other knowledge-based enterprises. Libraries shouldn't be overlooked and provide a significant community resource and engaging place for communities to come together in an encouraging environment providing a trusted source of digital resources, information and advice.

The opportunities presented to the City by embracing Industry 4.0 innovations are no doubt game-changing, however care must be taken to ensure that the unintended (negative) impacts are mitigated and managed. For example technologies such as augmented reality, IoT devices, big data analytics and virtual shop fronts, if adopted by the City's tourism, industrial and services sectors, can dramatically improve their productivity and offer a more compelling service offering to customers. However the unintended consequence of adopting such technologies could be that businesses will no longer be restricted by location or constrained by traditional bricks and mortar to do business, which if not managed carefully could see an increase in vacancy rates in commercial and retail spaces, requiring a review of land-use zoning.

A methodical and strategic approach to 'digitising the local economy' is therefore a critical step of the City's push to embrace Industry 4.0. By doing so smart decisions can be made with respect to supply and demand chains, investment opportunities and future trends that drive sustainable growth in the local economy while mitigating the risk of negative unintended consequences.

Digital transformation over the next five years and beyond will also be imperative for the Council as we continue to review infrastructure and streamline council processes to ensure a seamless customer-friendly interface occurs. In becoming more agile and increasing efficiencies, it will give customers a platform of services that makes us the most business-friendly and customer-centric Council in South Australia.



OPPORTUNITY SNAPSHOT

Energy & climate action

Electricity prices have had a significant impact on the profitability and overall business confidence of South Australian businesses. Wholesale electricity prices tend to be higher and more volatile in South Australia than in other States. This price differentiation and volatility partly reflects South Australia's historical reliance on gas powered generation, and its higher ratio of peak to average demand. Other contributing factors are South Australia's relatively concentrated generator ownership, generator bidding behaviour, thermal plant withdrawals, and limited import capability. Recent closures of South Australian and Victorian power plants have greatly contributed to reduced capacity and hence higher spot-prices for electricity. While the market forecast expects a drop in price, the average price of electricity will not return to historical levels (prior to 2013) for the foreseeable future.

The Council is committed to working with all local businesses and the broader community on programs and initiatives to reduce energy bill costs, whether it be through energy efficiency measures or the uptake of renewable energy solutions such as solar PV or battery storage. By taking a strategic approach to Energy Management, the City will take its place amongst a growing number of innovative Councils around Australia in the adoption of Council-wide initiatives to reduce both energy costs and greenhouse gas emissions, both for the ratepayer and the Council itself. Taking a strategic approach may also involve the adoption of a set of renewable energy or greenhouse gas emissions targets – for example City of Adelaide aiming for carbon neutrality by 2025, or Coffs Harbour Council aiming for 100% renewables by 2030.

The Council's approach to climate action also extends to the adaptation of the City to cope with the future impacts resulting from climate change. Council is committed to current and implementing new programs and projects that will assist businesses abilities to adapt and thrive in our changing climate. Through the Regional Resilient South Implementation Plan and the Council's Local Adaptation plan, a number of projects have been identified to assist economic growth that are outlined in the final chapter of the EAP. Implementing stormwater upgrades and water sensitive urban design projects will assist the City's ability to cope with more intense rainfall events expected in the region over the coming decades. Stormwater remains a concern in some areas of the City and Council has committed \$3 million towards stormwater management.

The City of Holdfast Bay continues to invest significant resources into conserving our coastline to maintain the reputation as Adelaide's Premier Seaside destination. Installation of sand groynes at Brighton beach and continued sand pumping through Adelaide's Living beaches Sand Transfer project assist in keeping our beaches sandy and aesthetically appealing to residents and visitors. Continued restoration of our sand dunes by staff and dedicated environmental volunteers assists in providing protection to our coastal community and businesses from storm events, which are predicted to be more frequent and intense over the coming decades through changing climate.

WEAKNESSES IMPACTING ON HOLDFAST BAY

The entire Holdfast Bay municipality is within 2.5 kilometres of the beach foreshore resulting in a highly seasonal environment for a significant proportion of industry sectors. With pristine coastline and environmental coastal parks, this impacts a disconnect between the foreshore reserves and retail precincts. A further disconnect occurs with a major arterial road dividing the city with significant traffic flows on an ongoing basis.

The city is well established with no available Greenfield land and limited land for commercial development unless changes in landuse zoning or redevelopment of existing areas.

Holdfast Bay currently has the largest proportion of ageing population in metropolitan Adelaide and while this can be envisaged as a weakness there are opportunities in many sectors to experience employment growth and the new industries emerging particularly in the health sector.





STRATEGIC DIRECTION ACTIONS

INTEGRATED COUNCIL ALIGNMENT

The City of Holdfast Bay is invested in its community through the delivery of ‘Our Place 2030’ strategic Plan.

The Plan reinforces our investment in enhancing quality of life for our residents, commitment to existing business and inspires innovation and industry investment by creating a place people like to live, visit and invest in.

Within each of the ‘Our Place 2030 – Pillars’ outlines a set of strategic actions in response to feedback from community and stakeholder engagement in 2016.

OUR PLACE 2030 VISION

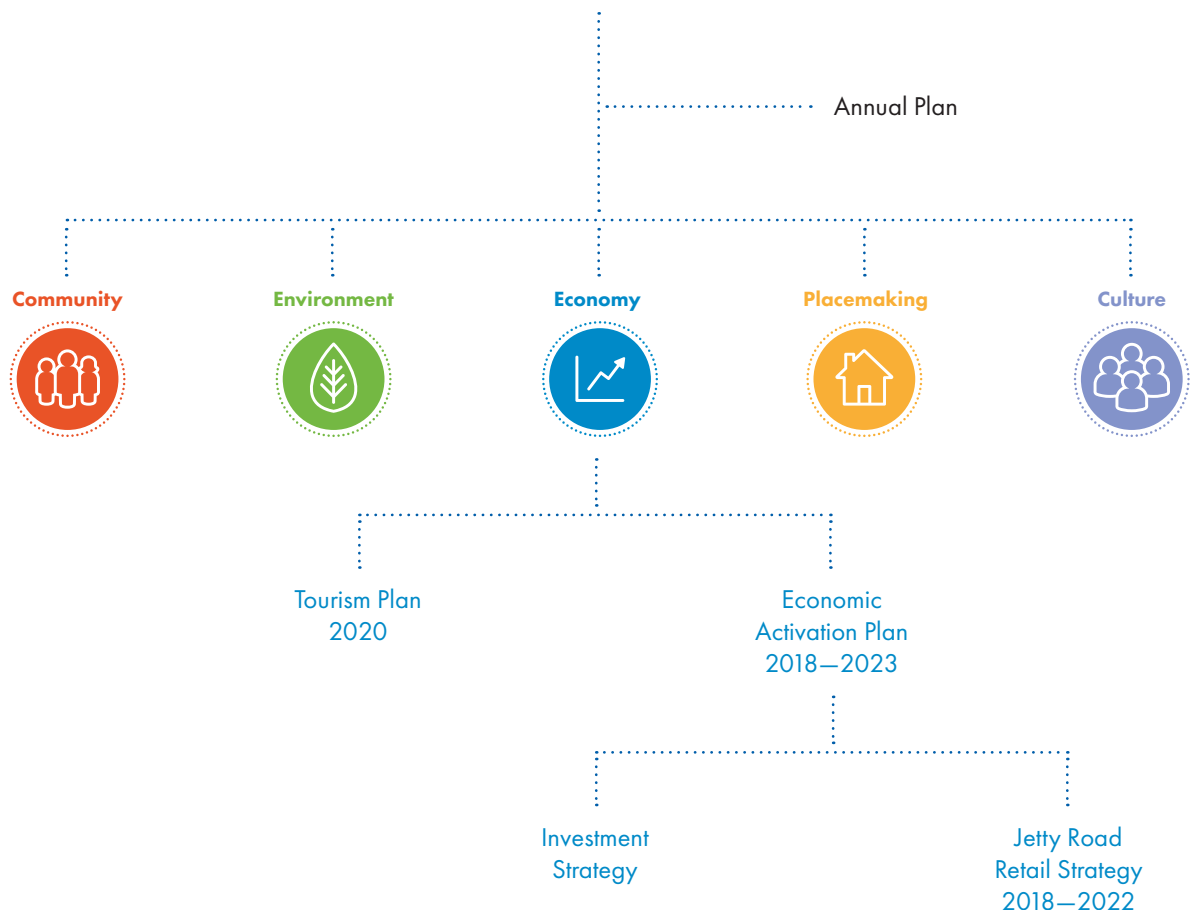
“Balancing our progress with our heritage, we lead in coastal management to deliver high-quality public spaces and services to build a welcoming, safe and active community where resident, visitor and business prosperity meet.”

The Economy Pillar supports ‘A diverse and resilient local economy’ through the development of an Economic Development Strategy, Tourism Plan, Investment Attraction Strategy and Digital Economy Strategy.

The Economic Activation Plan has been developed to embrace the key economic strategic directions through a set of actions to 2023. The Plan will set a five year horizon, identifying annual milestones.

OUR PLACE 2030

City of Holdfast Bay Council Plan





ECONOMY STRATEGIC DIRECTION

While the City of Holdfast Bay has defined five key economic strategic focus areas that ensure a diverse and resilient local economy, business and industry ultimately drive economic development.



As an enabler Council plays a vital role in facilitating, promoting and influencing economic development through a partnership approach with businesses, the community, state and federal government, industry bodies and other key stakeholders and representative bodies.

The EAP has sought to identify opportunities and actions outlined below that through an integrated partnership approach will deliver ongoing economic benefits and prosperity to the City.

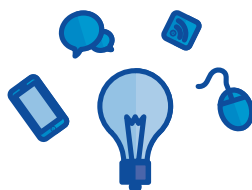
The success of the proposed initiatives will require commitment by all stakeholders by measuring and monitoring the outcomes and having a commitment to funding projects and programs to 2023.



STRATEGY 1: Business Capacity Building



STRATEGY 2: Investment Attraction and Growth



STRATEGY 3: Innovation and Digital Evolution



STRATEGY 4: Regional Collaboration



STRATEGY 5: Adelaide's Premier Seaside Destination

ACRONYMS

ABH	Adelaide Business Hub
ABR	Australian Business Register
ABS	Australian Bureau of Statistics
ACC	Adelaide City Council
ACB	Adelaide Convention Bureau
CHB	City of Holdfast Bay
CSC	Charles Sturt City Council
DPTI	Department of Planning, Transport and Infrastructure

DSD	Department of State Development
GIS	Geographic Information System
HB	Holdfast Bay
JRMC	Jetty Road Mainstreet Committee
MCC	Marion City Council
OCC	Onkaparinga City Council
OSCBC	Office of the Small Business Commissioner
PAEC	Port Adelaide Enfield City Council

SAEDB	Southern Adelaide Economic Development Board
SASBAS	Southern Adelaide Small Business Advisory Service
SATC	South Australian Tourism Commission
SATIC	South Australian Tourism Industry Council
WBL	Western Business Leaders
WBC	West Torrens City Council



STRATEGY 1. BUSINESS CAPACITY BUILDING

OBJECTIVE:

Implement and support a range of programs designed to equip local businesses with the knowledge and capacity to achieve business sustainability, manage business expansion and prepare for export opportunities.

Council Plan Alignment



1. Supporting and growing local business
2. Making it easier to do business



1. Fostering an engaged, contributing community



1. Protecting Biodiversity
2. Building an environmentally resilient city
3. Using resources efficiently



1. Creating lively and safe places
2. Developing walkable, connected neighbourhoods
3. Building character and celebrating history



1. Provide customer-centred services
2. Enabling high performance
3. Being financially accountable
4. Supporting excellent, efficient operations



Complete



Ongoing/In Progress

ACTION	OUTCOME	MEASURE	LEAD/PARTNER	TIMEFRAME				
				18/19	19/20	20/21	21/22	22/23
1.1 Host forums, networking and training and support for new and existing businesses	Deliver a series of business networking and training focusing on areas identified in the Business Confidence survey	Business confidence survey	CHB Businesses	✓	↻	↻	↻	↻
1.2 Shop Local Campaign	Decrease the escape spend by local residents	Reduce escape spend by \$50m annually	CHB Businesses JRMC	✓	✓	✓	✓	✓
1.3 Investigate central co-ordination of business precincts	Establishment of precinct based business associations for a coordinated approach to precinct development	Establishment of three business precinct associations by 2021	CHB JRMC Business precincts	✓	✓	✓	↻	↻
1.4 Red-tape reduction program	Implement continuous improvement initiatives to reduce red-tape in the delivery of Council services to business	Reporting bi-annually to the Small Business Commissioner in line with Small Business Friendly Charter	CHB OSBC	✓	✓	↻	↻	↻
1.5 Maintain a single point of contact for businesses through a Business Concierge service	One-stop-shop business website and one point of Council contact for business engagement	Reporting bi-annually to the Small Business Commissioner in line with Small Business Friendly Charter	CHB	✓	↻	↻	↻	↻
1.6 Education and workforce development	Provide a direct link to business and education providers in the development of a skilled workforce and pathways to employment	Engage with all Holdfast Bay secondary schools and Flinders University	CHB Businesses Flinders University HB Secondary Schools	✓	✓	✓	✓	✓
1.7 Small Business Grants for new and existing businesses	Deliver small business grants annually to new and existing small businesses	\$50,000 distributed annually	CHB	↻	↻	↻	↻	Review
1.8 Shopfront Grant	Enhance the appearance of shopfronts and create a more vibrant appeal to precincts	\$50,000 distributed annually	CHB Landlords Businesses	✓	✓	✓	✓	✓
1.9 Strengthen the Buy Local Procurement Policy	Ensure Council purchases are made in the best interest of the community in accordance with Council's legislative requirements	Reporting bi-annually to the Small Business Commissioner in line with Small Business Friendly Charter	CHB, OSBC	✓	✓	✓	✓	✓

1.10 Increase the amount of green infrastructure within the City	Reduce surface temperatures in industrial and retail precincts	Increase in tree canopy	CHB	✓	✓	✓			
1.11 Landfill diversion program	Convert all plastics bags in businesses for fruit and vegetables to compostable version	Zero plastic bags	CHB Green Industries SA Business	✓	✓	✓			
1.12 Situation Analysis audit for Circular Economy opportunities	Audit Somerton Park industrial precinct for a shared economy	90% business participation	CHB Flinders University Business Industry precincts	✓					
1.13 Circular economy shared services	Reduce annual costs and increase profitability	Number of businesses sharing resources/ services	Business precincts CHB		✓	✓	✓	✓	
1.14 Bulk purchase of collective resources (energy, insurance, solar etc)	Reduce annual costs and increase profitability	Number of businesses subscribing to bulk purchases	Business precincts CHB		✓	✓			
1.15 Customer Relationship Management system (CRMS)	Improve business relationship, data analysis and history of client relations	Linkage of ABR and CHB data in a complete GIS CRM system	CHB External provider	✓	↻	↻	↻	↻	
1.16 Clean Energy Strategy for Council	Reduces energy costs for both local businesses and Councils	Energy cost reductions Greenhouse gas emissions reductions	CHB Green Industries SA External provider DSD	✓	✓				





STRATEGY 2. INVESTMENT GROWTH & ATTRACTION

OBJECTIVE:

Explore and develop opportunities in collaboration with state and federal government and the private sector that maximises new investment and economic growth prospects in Holdfast Bay.

Council Plan Alignment



1. Supporting and growing local business
2. Making it easier to do business



1. Creating lively and safe places/neighbourhoods
2. Building character and celebrating history



1. Provide customer-centred services
2. Enabling high performance
3. Being financially accountable
4. Supporting excellent, efficient operations



Complete



Ongoing/In Progress

ACTION	OUTCOME	MEASURE	LEAD/PARTNER	TIMEFRAME				
				18/19	19/20	20/21	21/22	22/23
2.1 Establish an advocacy and lobbyist role with state and federal Govt	Identify projects and programs that would benefit state and federal support	Joint project initiatives identified	CHB Govt	✓	✓	↻	↻	↻
2.2 Joint project initiatives identified	Increase the knowledge of industry through access to shared data	Number of new businesses locating to Holdfast Bay	CHB JRMCMC	✓	↻	↻	↻	↻
2.3 Develop new and diverse income streams	Increase the capacity of Adelaide Beaches website and identify additional income streams	Revenue raised via the Adelaide Beaches website to support tourism initiatives	CHB Western Alliance	✓	↻	↻	↻	↻
2.4 Revise and align Holdfast Bay Investment Strategy	Provide relevant data and content to attract investment to Holdfast Bay	Number of new businesses establishing via ABR data	CHB	✓				
2.5 Seek new opportunities for Glenelg Jetty project	Create an economic and environmental showcase incorporating Glenelg jetty	Investment and funding commitment from government and private sector	JRMCMC HBC Govt		✓	✓	✓	✓
2.6 Foster creative business hubs and shared facilities	Ensure opportunities exist to incorporate economic opportunities into community and recreational facilities	Establish at least one creative business hub	CHB JRMCMC Business		✓	✓		
2.7 Undertake a review of zoning and other legislative restrictions to business growth	Undertake a strategic review of business precincts to establish current and future business needs	Review Somerton Park Industrial Park	CHB		✓	✓		
2.8 Identify investment sectors for Somerton Park Industrial Precinct	A thriving industrial precinct that is agile and responsive to growth	Introduction of new industry sectors relating to growth sectors to Somerton Park Industrial precinct	CHB Businesses		✓	✓	✓	✓
2.9 Transport study for whole of city	Identify future infrastructure requirements for the city	Council adoption	CHB	✓				
2.10 Jetty Road Masterplan	Improved amenity and activation for Jetty Road Glenelg	Increased visual appeal and visitation to the street and reduction of vehicle access	CHB JRMCMC Govt	✓	✓	✓	✓	To 2028

2.11 Brighton Road Masterplan	Develop a masterplan for Brighton Road in consultation with the community and key stakeholders	Council adoption	CHB Businesses Govt	✓				
2.12 Community Centres study	Identifies economic opportunities within community centres	Council adoption	CHB Community Business Govt	✓				
2.13 Open Space Public Realm Strategy	Identifies economic opportunities within recreational spaces	Council adoption	CHB Community Government Business	✓				
2.14 Sporting Grounds study	Identifies economic opportunities within sporting facilities	Council adoption	CHB Sporting Bodies Community Business Govt	✓				
2.15 Visual and Brand development for business precincts	Develop a brand for each precinct	Create brands for at least 3 precincts	CHB Businesses	✓	✓	✓	✓	✓
2.16 Export ready programs	Increase the knowledge of businesses to prepare for export	Increase from 2016 ABS regional export figures annually	Business CHB Austrade Tradestart		✓	✓	✓	



ENTERTAIN/CENTRE
Via City

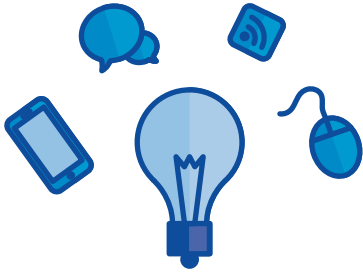


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STRATEGY 3. INNOVATION AND DIGITAL EVOLUTION

OBJECTIVE:

Create opportunities that develop the competencies, skills and capacity of local businesses that instills a digital culture and leads to innovation and sustainable outcomes for a vibrant and connected community.

Council Plan Alignment



1. Supporting and growing local business
2. Making it easier to do business
3. Harnessing emerging technology



1. Celebrating culture and diversity
2. Providing welcoming, accessible facilities



1. Creating lively and safe places
2. Developing walkable, connected neighbourhoods
3. Building character and celebrating history



1. Provide customer-centred services
2. Enabling high performance
3. Being financially accountable
4. Supporting excellent, efficient operations



Complete



Ongoing/In Progress

ACTION	OUTCOME	MEASURE	LEAD/PARTNER	TIMEFRAME				
				18/19	19/20	20/21	21/22	22/23
3.1 Utilise digital technology for business online transactions	Utilise education providers to upskill industry precinct workforce. Create pathways to employment opportunities	Business Confidence Survey results	CHB Flinders University Schools Businesses JRMC	✓	✓	✓		
3.2 Investigate establishing a Digital Hub/s	Places and spaces for entrepreneurs and homebased businesses to connect	A least one digital/co-working space established by 2020	CHB Businesses Landlords	✓	✓			
3.3 Investigate provision of infrastructure for electric vehicles	Provide infrastructure across the City for electric vehicles	Reduction in carbon omissions and increase in electric vehicles	CHB		✓			
3.4 Investigate fast broadband to Industrial Precinct	Improved broadband capabilities to Somerton Park Industrial precinct	Increase in access to data	ACC CHB State Govt Sabrenet EscapeNet	✓				
3.5 Promote access to NBN to all businesses and residents for connection to digital services	Improved broadband capabilities across the City	Business Confidence Survey results	CHB NBN Telcos	✓				
3.6 Explore opportunities to integrate Adelaide Smart Cities Program to Holdfast Bay	Improved digital connectivity across Adelaide and link to the GigCity program	Business Confidence Survey results	ACC CHB State Govt Sabrenet EscapeNet	✓	✓			
3.7 Citywide free Wifi	A City that embraces digital connectivity for mobile businesses	Increase in vibrancy in retail precincts	CHB Telcos	✓	✓	✓		
3.8 Seminars and training on Industry 4.0	Increased knowledge on Industry 4.0 for Somerton park Industrial precinct	Business Confidence Survey results	CHB Businesses	✓	✓			



STRATEGY 4. REGIONAL COLLABORATION

OBJECTIVE:

Incorporate collaborative regional approaches where shared outcomes can be achieved for a cohesive and robust Holdfast Bay economy.

Council Plan Alignment



1. Supporting and growing local business
2. Making it easier to do business
3. Harnessing emerging technology
4. Boosting our visitor economy



1. Fostering an engaged, contributing community
2. Celebrating culture and diversity
3. Providing welcoming, accessible facilities
4. Fostering an engaged contribution



1. Building an environmentally resilient city
2. Using resources efficiently



1. Creating lively and safe places
2. Developing walkable, connected neighbourhoods
3. Building character and celebrating history



1. Provide customer-centred services
2. Enabling high performance
3. Being financially accountable
4. Supporting excellent, efficient operations



Complete



Ongoing/In Progress

ACTION	OUTCOME	MEASURE	LEAD/PARTNER	TIMEFRAME				
				18/19	19/20	20/21	21/22	22/23
4.1 University and Secondary School linkage programs	Increase the level of skill base for students and businesses	Number of schools engaged with businesses. Number of businesses accessing small business grant for New Venture Institute programs	CHB Flinders University HB Secondary Schools	✓	✓	✓	✓	✓
4.2 Create an alliance with the City of Adelaide for the development of tourism, infrastructure, digital connectivity and wayfinding	Identify and implement joint projects that enhance the visitor experience and increases business digital connectivity	Create a joint wayfinding strategy with ACC. Link Somerton Park with Gig city program.	CHB ACC Business	✓	✓	✓	✓	✓
4.3 Develop a Western Alliance economic development strategy	Identify joint economic project alignment across the four western Councils for the development of a western economic development strategy	Produce a western regional economic development strategy	CHB WTC CCS PAE WLB	✓	✓			
4.4 Free business advisory through the Southern Adelaide Small Business Advisory Service	Provide one-on-one on demand and visiting business advisory service	Maintain 15-20% of the program service delivery across the four Councils	CHB MCC OCC SASBAS	✓	✓			
4.5 Southern Economic Development Board strategic alignment	Identify joint economic project alignment across the three southern Councils	Increase CHB input to SAEDB	SAEDB CHB MCC OCC	✓	✓			
4.6 Western Business Leaders Group business network program	Increase Holdfast Bay business membership on WLB and their attendance at networking events	Build Holdfast Bay business membership on WLB to 50.	CHB WBL	✓	✓	✓	✓	✓
4.7 Identify key regional projects by industry sector	Identify industry leaders and provide Input to the southern and western alliance regional economic development agenda	Increase participation by Holdfast Bay businesses in key industry sectors	CHB Business MCC OCC CSC WTC PAEC SAEDB WLB	✓	✓	✓	✓	✓



STRATEGY 5. ADELAIDE'S PREMIER SEASIDE DESTINATION

OBJECTIVE:

A city that provides a balance between the needs of the local community and visitor expectations through sustainable tourism and protection of amenity and the natural environment.

Council Plan Alignment



1. Supporting and growing local business
2. Making it easier to do business
3. Harnessing emerging technology
4. Boosting our visitor economy



1. Fostering an engaged, contributing community
2. Celebrating culture and diversity
3. Providing welcoming, accessible facilities
4. Fostering an engaged contribution



1. Building an environmentally resilient city
2. Using resources efficiently



1. Creating lively and safe places
2. Developing walkable, connected neighbourhoods
3. Building character and celebrating history



1. Provide customer-centred services
2. Enabling high performance
3. Being financially accountable
4. Supporting excellent, efficient operations



Complete



Ongoing/In Progress

ACTION	OUTCOME	MEASURE	LEAD/PARTNER	TIMEFRAME				
				18/19	19/20	20/21	21/22	22/23
5.1 Implement actions outlined in the Holdfast Bay Tourism Plan 2020	Improve the visitor experience and increase awareness of Holdfast Bay to national and international visitors. Provide premier facilities and experiences to local, national and international visitation	Increase the number of visitors to Holdfast Bay: target increase – 15% by 2022	CHB State Govt Federal Govt Private Investment Western Councils Southern Councils SATIC SATC ACB Key Stakeholders	✓	✓	✓	✓	✓
5.1.1 Driving Demand (Strategies 1-7)	Secure marketing and investment opportunities that promotes and strengthens Holdfast Bay as a global tourism destination and supports tourism product development	Increase the number of high value events by 1% and overnight visitors to Holdfast Bay by 5%	CHB State Govt Federal Govt Key Stakeholders	✓	✓	✓	✓	✓
5.1.2 Visitor Experience (Strategies 1-7)	Increase digital connectivity and visitor appeal of the city, particularly in retail precincts, local amenity and infrastructure, and recreational facilities	Increase public Wifi to all public areas and retail precincts across the city	CHB Key Stakeholders	✓	✓	✓		
5.1.3 Tourism innovation and sustainability (Strategies 1-7)	Creative sustainable tourism products that lead to economic growth and add value to other industry sectors	Create an integrated approach to tourism across Council departments and utilise data that informs key stakeholders of trends and economic impact of tourism initiatives	CHB Key Stakeholders JRMC	✓	✓	✓	✓	✓
5.1.4 Consultation and partnerships (Strategies 1-8)	Deliver regional and state tourism initiatives in partnership with regional partners, state government and key stakeholders that result in direct economic benefits to Holdfast Bay	Utilise data that informs key stakeholders of economic impact of regional and state tourism initiatives	CHB JRMC Western Councils Southern Councils SATIC SATC ACB Key Stakeholders	✓	✓	✓	✓	✓

5.2 Jetty Road Retail Strategy 2018-2022	Provide future direction and identify the actions required to maintain a prosperous and vibrant Jetty Road Glenelg	Maintain vacancies rates at less than 6.0%	CHB JPMC Community	✓	✓	✓	✓
5.3 Develop a Tourism Strategy 2021-2030	Provide a framework and strategic priorities for the planning, development, management and marketing of Holdfast Bay	Review Tourism Plan 2020 and develop a revised Tourism strategy	CHB Community Businesses JPMC SATIC SATIC ACB JPMC Key stakeholders			✓	





GET CONNECTED

To realise the five year Economic Activation Plan 2018-2023, the City of Holdfast Bay welcomes input from the community, businesses, visitors, strategic partners and the wider community during the life of the EAP.

To gain the most up-to-date economic information for the City or to download a copy of the EAP visit www.holdfast.sa.gov.au/business.

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2017 City of Holdfast Bay Business Confidence Survey

ALIA – Australian Libraries; the digital economy within everyone's reach

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Building Western Adelaide strategic plan

Dept of Industry, Innovation and Science – Australian Industry Report 2015

City of Holdfast Bay 'Our Place 2030' Strategic plan

City of Holdfast Bay Tourism Plan 2020

City of Holdfast Bay Housing Strategy directions paper

IBIS World Australia's Digital Future 2050

South Australian Small Business Commission



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