

MidCoast Regional Economic Development Strategy 2018 - 2022

Supporting Analysis



Leveraging our strengths

- Land and water
- Infrastructure and location
- Lifestyle and amenity

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Overview and summary

This document sets out a Regional Economic Development Strategy (the Strategy) for the MidCoast Functional Economic Region (the Region). It provides a vision for future economic development and describes strategies, initiatives and actions to be implemented over the next four years.

This Strategy has been developed using an approach that is being applied across all regions in NSW. It aligns with the local strategies and the NSW Government's *Economic Development Strategy for Regional NSW*. In conjunction with the MidCoast Council, a community engagement process was conducted involving workshops, an online survey, and face to face and telephone interviews with businesses, business and community organisations and members of the community.

The Region is a diverse, but largely self-contained region with an estimated resident population of 91,958 people.

The MidCoast Region has several industry specialisations based on regional advantages that include land and water assets, its location and infrastructure and the desirability of the Region as a place to visit and live.

The Region's natural assets include mineral resources for mining, agricultural land highly suitable for dairy, beef cattle and poultry industries and water resources ideal for aquaculture.

The MidCoast Region's proximity to Sydney and Newcastle and connection via the Pacific Highway coupled with affordable land, make the Region attractive to light industrial and freight/logistic industries. The potential will increase with the development of the Northern Gateway project which will likely make Taree a hub for freight and logistics and should significantly reduce freight costs in and out of the Region.

The Region is a popular destination for visitors, those seeking a sea/tree change and

for retirees. In addition to well serviced communities, it has abundant coastline and inland natural features including the Barrington Tops World Heritage National Park.

Going forward there are opportunities to strengthen and grow key industry sectors. These include boosting productivity in agriculture through greater use of technology and innovation, growing the local aquaculture industry, leveraging advantages for freight and logistics and building on its strength as an attractive location for people to reside and visit.

The Region's long term economic vision is

The MidCoast Region will have sustainable economic growth, founded on the region's natural assets, amenity and location, while offering a healthy lifestyle and community connection.

The MidCoast Region will be regarded as a desirable place to establish and grow a business while living an enviable lifestyle and a premium location to visit, raise a family, settle and retire. The Region will particularly appeal to:

- businesses seeking an affordable and supportive business environment with proximity and connection to major centres;
- skilled workers seeking a sea-change and tree-change lifestyle while maintaining good connections to Sydney, Newcastle and beyond;
- self-funded and other retirees seeking a highly desirable but affordable coastal location with proximity to Sydney and Newcastle;

- visitors wishing to escape the cities and enjoy the natural attractions of the area; and,
- people (including those with care needs) seeking a supportive environment to live, work and visit.

The table below summarises a set of strategies and initiatives to achieve the vision.

Strategies	Key initiatives
<p>A. Strengthening the Region as a location of choice</p>	<ul style="list-style-type: none"> Improve the core foundation infrastructure, in particular the roads and bridges but also other infrastructure relating to telecommunications and water Enhance and expand business infrastructure that will be drivers for growth, in particular the Northern Gateway project and other employment lands for commercial and light industrial Directly invest in key tourism assets to increase visitation, particularly in the off-season Encourage other lifestyle and tourist developments that will increase the Region's attractiveness to sea/tree change professionals
<p>B. Creating a supportive environment for businesses to invest and grow</p>	<ul style="list-style-type: none"> Identify and reduce/remove regulatory barriers that hinder business growth Ensure that policies, procedures and charges are appropriate to support economic development consistent with the vision Encourage partnerships to enable businesses to leverage each other and other groups Actively support new and existing businesses with advice and other services
<p>C. Marketing the MidCoast Region</p>	<p>Marketing to</p> <ul style="list-style-type: none"> Business owners and professional workers who may relocate to the Region Potential visitors to ensure that they are aware of the Region's attractions Local residents to encourage them to 'play in their own backyard' and recommend the area to friends and relatives The MidCoast Region labour force and community to encourage them to deliver on the vision

The body of this document provides additional detail on the context and process for the Strategy (Section 1), the Region (Section 2), considerations (Section 3), the economic future of the Region (Section 4) and the Strategies (Section 5). A detailed action plan can be found in section 6 of this document.

MidCoast Council is a key institution in respect to implementing the Strategy. Council will work closely with the business community and other private, public and community stakeholders to ensure the successful implementation of the Strategy. Responsibility to implement actions within the Strategy does not lie with Council alone and requires other key organisations to drive specific actions.

1. Introduction

This Regional Economic Development Strategy (the Strategy) has been developed for the functional economic region (the Region)¹ that matches MidCoast Local Government Area (LGA). The MidCoast LGA was formed by proclamation on the 12th May 2016 as an amalgamation of the former Greater Taree City, Great Lakes and Gloucester Shire LGAs.² It is a timely document given the recent creation of the amalgamated LGA.

The Regional Economic Development Strategy aims to align with the aspirations of the residents and businesses in the Region. It identifies the strengths of the local economy, articulates a long term economic vision and

identifies the immediate actions required to deliver that vision. The Strategy also takes into consideration the regional risks and actions to mitigate these risks.

The NSW Government engaged Sapere Research Group to work closely with the MidCoast Council in developing the Strategy, using an approach developed by the Centre for Economic and Regional Development (CERD) under the guidance of its panel of experts.³ A core focus of the methodology is to build on the strengths of the Region and reflect best practice in the development of the Strategy.

The MidCoast Region

The MidCoast Region has an area of 10,052 square kilometres located about 320 kilometres north of Sydney. It shares boundaries with the Hunter Region to the south, the Port Macquarie-Hastings Region to the north and the Tableland Regions to the west. The Region houses an estimated resident population of 91,958 people⁴ and is comprised of a number of main population centres including Taree, Forster-Tuncurry, Tea Gardens-Hawks Nest, Gloucester, Stroud, Wingham and Old Bar.

Figure 1: The MidCoast Region



Objectives

This document sets out the long-term vision (i.e. decades into the future) for the economic future of the Region and identifies the strategies and immediate actions that can be undertaken in the next four years to pursue this vision.

The objectives of this Strategy are to:

- build on existing strengths in the Region and enhance those strengths;
- identify new opportunities to enhance the development, performance and competitiveness of the Region; and,
- set the Region on the path towards long term sustainability.

This Strategy identifies the aspirations and goals of the Region, and lays out a pathway that its residents can follow in order to reach these objectives. As well as steering the

Region towards its objectives, a successful Regional Economic Development Strategy must take into account the strengths and weaknesses of the Region, as well as the capacity and capability of its industries, institutions and infrastructure, and identify actions that can leverage these strengths whilst mitigating any regional weaknesses. The economic fortune of a region does not however rest entirely in the hands of its residents. Exogenous factors, such as international and domestic megatrends, as well as developments in other parts of NSW (and Australia), can present both opportunities and challenges to a region's development. For this reason, this Strategy should be viewed as a living document and updated at appropriate intervals to take into account changes in the external environment.



Strategic context

This Strategy aligns with the NSW Government's 'Making it Happen in the Regions: Regional Development Framework' and 'Economic Development Strategy for Regional NSW'.

The Strategy also leverages and aligns with a number of local Strategies and projects. The key documents that overlap with, and have influenced, this report are listed in the table below.

Table 1: Key plans/strategies of relevance to the review⁵

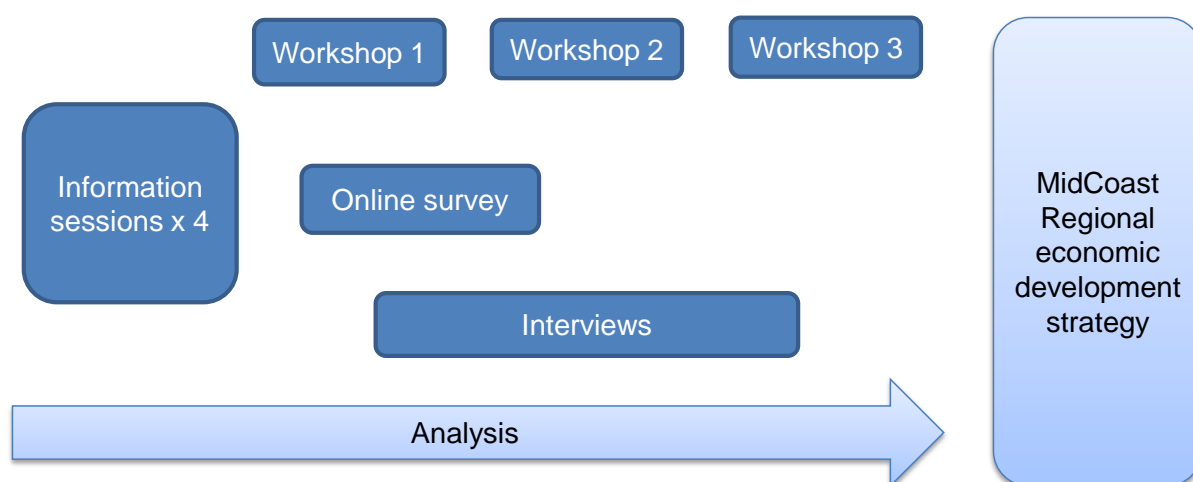
Plan / strategy	Objectives/ relevance
The MidCoast Community Strategic Plan (CSP)	Expresses how the MidCoast Region community wants to develop into the future
Delivery Programs <ul style="list-style-type: none"> • Gloucester 2012-16 • Great Lakes 2013-17 • Manning 2013-17 	Outlines what Council proposes to achieve towards the strategic objectives within the CSP
MidCoast Council 2017/8 Operational Plan	Outlines activities and services Council will provide during 2017/18
Hunter Regional Plan 2036	Provides the overarching framework to guide the NSW Government's land use planning priorities and decisions. The plan includes a series of actions to grow the economy of the MidCoast Region and Port Stephens ⁶
Rural Opportunities Land Use Strategy (ROLUS) (In development)	Aims to provide clear and informed land use planning recommendations that will provide a framework for the preparation of a new comprehensive Mid-Coast local environmental plan and development control plan
Draft Manning Valley Local Strategy, 27 May 2016 (Not formally adopted)	Provides a useful background to issues and opportunities in the former Greater Taree LGA
MidCoast Destination Management Plan	Provides a framework to guide sustainable tourism development



Consultation methodology

Consultation has been an important part of the development of the Strategy. In conjunction with the MidCoast Council, a community engagement process was conducted involving workshops, an online survey, and face to face and telephone interviews with businesses, business and community organisations and members of the community. Figure 2 provides an overview of the consultation process.

Figure 2: MidCoast Region Strategy Consultation Process



- **Analysis** — Background analysis was undertaken prior to all consultation sessions. This facilitated more informative discussions.
- **Information sessions** — Four information sessions were held in Bulahdelah, Gloucester, Taree and Forster. In total around 60 people from the community attended the sessions.
- **Survey** — An online survey (~15 minutes) was conducted in October 2017. 110 responses were received from a mix of businesses and other stakeholders. The web-link to the survey was advertised on the Council’s website and sent directly to key businesses and business chambers to circulate. The survey covered strengths, weaknesses, risks, issues and opportunities.
- **Workshops** — Three workshops were conducted with the MidCoast Region community. The first workshop was open to all members of the community and had around 100 attendees with broad representation from across the Region. Participants in groups discussed key endowments, issues and opportunities and collectively voted on the key opportunities. The second workshop was attended by around 40 selected invitees. The focus of the second workshop was on testing the preliminary findings relating to the economic opportunities, strategies and infrastructure priorities. All original participants were invited to the third and final workshop which was attended by 25 people. At the final workshop, participants discussed the economic vision and reviewed in depth the strategies and actions.
- **Interviews** — Around 20 information gathering interviews were conducted with a range of stakeholders including people in the business community and the public and non-for-profit sectors.

2. Regional profile

Overview

The MidCoast Region is diverse, but largely self-contained. The Region extends from the coastline, west to the escarpment of the Great Dividing Range. It includes the Manning River Valley in the north, the Wallis, Smiths and Myall Lakes systems, the northern foreshore of Port Stephens, the agricultural hinterland and the rugged, forested ranges of the Barrington Tops, Woko and Tapin Tops National Parks. During the winter, it is possible to move from the beach to the snow with a short drive.

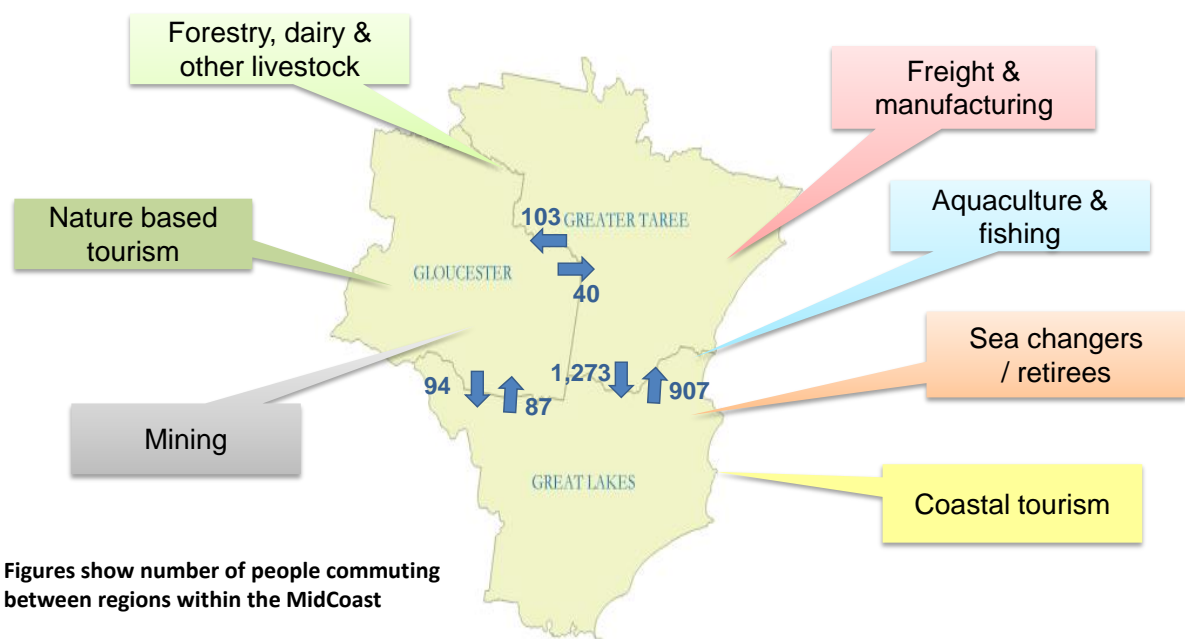
A large proportion of the Region is National Park, State Forest and nature reserves. Much of the rural area is used for timber production and livestock farming, primarily dairy and beef cattle with a growing poultry industry. Coal mining occurs in the Gloucester coal basin.

Oyster farming and fishing are also important industries that occur on the coastal locations.

The Region is a key holiday destination. During the summer months the population swells with tourists from Sydney, Newcastle and other destinations coming to enjoy the Region's pristine coastline and beaches, coastal lakes, lagoons and other environmental attractions. Popular year round attractions include the Barrington Tops National Park and other National Parks and reserves, the Manning River and Ellenborough Falls.

The MidCoast Region is also a popular location for retirement, having a large, and growing aged care sector.

Figure 3: The diverse but integrated region of the MidCoast Region



Source: Based on Census 2016, place of work and usual residence

Note: Location of industries is illustrative

The Region is well connected. The Pacific Highway, a national route, connecting Sydney and Brisbane runs North-South through the Region, providing ready access to the Port of Newcastle, Newcastle Airport, Port Macquarie

Airport and to Sydney and Brisbane markets. The North Coast railway line provides passenger and rail freight services to Sydney. Fly Pelican operates regular passenger

transport (RPT) services from Taree Regional Airport to Sydney.

The vast majority of people working in the Region also reside in the Region. There is substantial commuting between Forster-Tuncurry and Taree for work and leisure. The Gloucester area is more self-contained with limited commuting between Gloucester and

other localities. There is some commuting in and out of the Region. A significant number (more than 4% of the resident workforce) reported working in Sydney or Newcastle. Some (about 3% in total) reported working in the neighbouring Local Government Area's of Port Macquarie-Hastings and Port Stephens.

Demographic profile

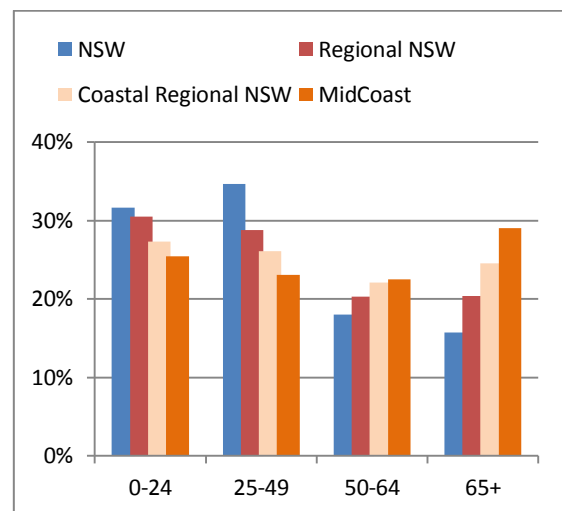
Age and household mix

The MidCoast Region has an estimated resident population of 91,958. It has experienced significant population growth over the last 10 years, with empty nesters and retirees strongly represented in this growth. From 2006 to 2016, the MidCoast Region population grew by 7,379 people, an average annual growth rate of 0.84 per cent. This is lower than the state average (1.39%) and other coastal regional areas (0.98%).⁷

The rate of growth has varied across the Region (see Figure 18 in Appendix 1). The annual population growth rate since 1991 for Gloucester, Greater Taree and Great Lakes regions is 0.2, 0.7 and 1.5 per cent, respectively.

The population of the MidCoast Region is characterised by a significantly higher proportion of people in the older age groups and a lower proportion of people in the young working age group of 15-44, relative to other regions in NSW. As illustrated in Figure 4, the 'hollowing out' of the workforce cohorts, while common in Regional NSW is more significant in the MidCoast Region. People aged 65+ years currently represent around 30 per cent of the Region's total population, making it one of the highest concentrations of an ageing population in NSW, well above the State and regional average of 16 per cent and 21 per cent, respectively.

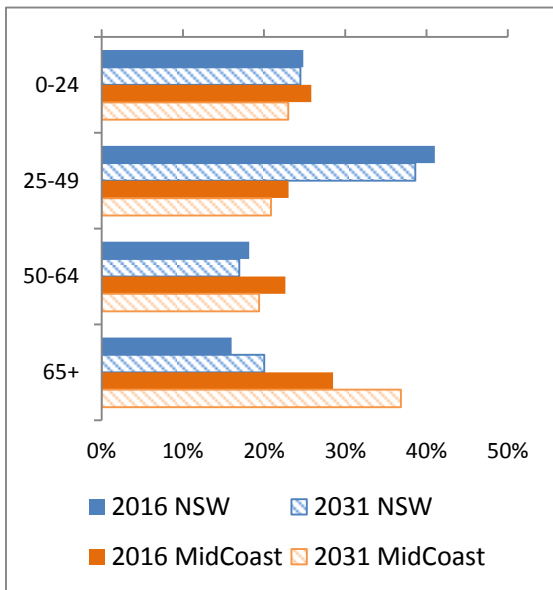
Figure 4: Population age profile



Source: ABS Estimated regional population 2016

The NSW Department of Planning and Environment forecasts this demographic disparity will intensify with the 65 and over population projected to increase to 37 per cent by 2031. This represents an additional 9,300 people in the 65+ age bracket (see Figure 5 below).

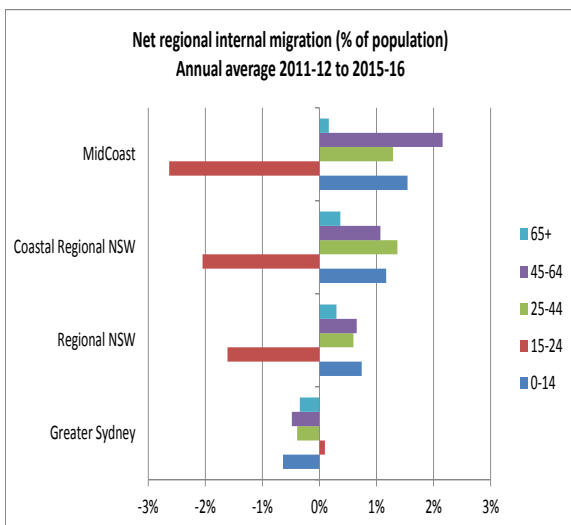
Figure 5: Population mix projections



Source: NSW Department of Planning and Environment – Population Projections

The migration of people in and out of the Region helps to explain the change in population. As illustrated in Figure 6, there is a large shift of people aged 45+ to the Region. There is also a very large movement of people age 15-24 out of the Region. As reflected in the movement of people aged 0-14, many families are relocating to the MidCoast Region. These trends are consistent with, but are more pronounced than, in other coastal regional areas in NSW.

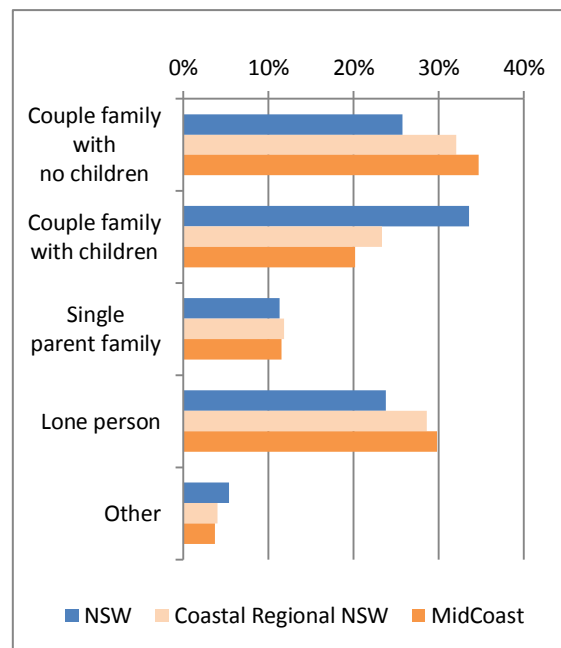
Figure 6: Net migration to MidCoast Region by age



Source: ABS Migration Australia (Cat. No. 3412.0)

The household composition profile (illustrated in Figure 7) differs from the rest of NSW, with the MidCoast Region having a relatively lower proportion of households with children. This difference is largely explained by the age-profile. However, it is notable that among households with children there is a relatively high proportion of single-parent families. The ratio of single-parent householders to couple-with-children households is 0.52 in the MidCoast Region, which is about 53 per cent higher than the NSW average (0.34).

Figure 7: Household composition profile



Source: ABS 2016 Census of Population and Housing

Labour force

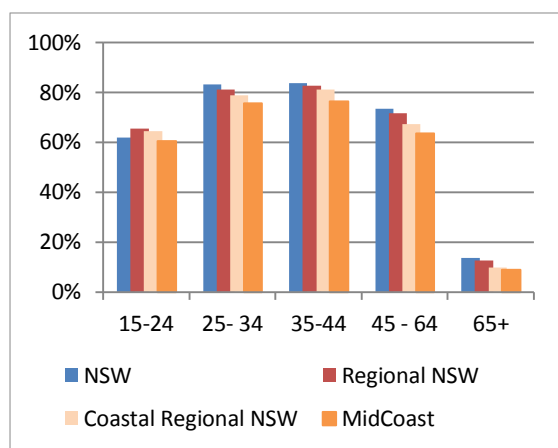
The size of the MidCoast Region’s labour force (including those employed and those seeking work) in 2016 was 33,011⁸ which is around one-third of the resident population.

The age profile of the MidCoast Region’s labour force reflects the population age profile. The MidCoast Region has a large proportion (53%) of workers aged 45+, which is significantly larger than comparable proportions for NSW (40%) and larger than coastal regional areas in NSW (50%).

The Region’s performance for employment is poor relative to NSW benchmarks.

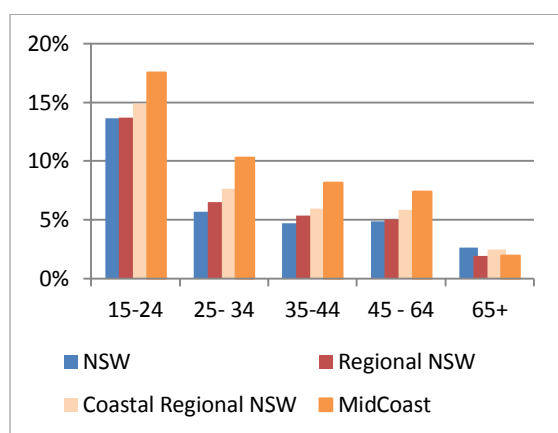
The labour force participation rate is generally lower and the unemployment rate higher than benchmarks for NSW, Regional NSW and Coastal Regional NSW. Youth unemployment is a particular concern with 17.5 per cent (1 in 6) people aged 15 to 24 reporting they are unemployed.

Figure 8: Labour participation rate by age



Source: ABS 2016 Census of Population and Housing

Figure 9: Unemployment rate by age

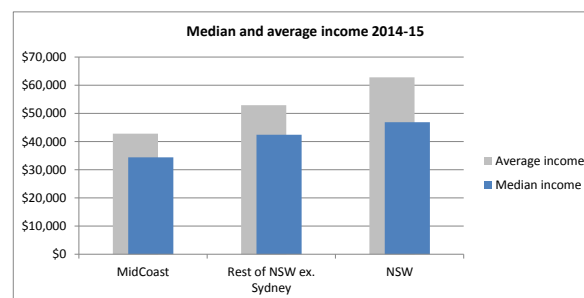


Source: ABS 2016 Census of Population and Housing

Around 35 per cent of the labour force is employed part-time which is relatively high compared with the NSW average (28%) and the coastal regional areas in NSW.

The poor employment outcomes are reflected in estimates of income. As shown in Figure 10, personal, household and family median incomes are lower in the MidCoast Region than for the State and the regions outside of Sydney.

Figure 10: Median and average personal incomes



Source: ABS Estimates of Personal Income for Small Areas, 2011-15

The economic conditions vary across the Region, with conditions in the Greater Taree area more depressed than in Great Lakes and Gloucester. The former Greater Taree LGA was ranked in the bottom 10 per cent of LGAs in Regional NSW on the SEIFA⁹ index of social and economic advantage and disadvantage.

A key concern is that there is significant intergenerational unemployment. The proportion of families with non-working parents is significantly high in the MidCoast Region (2.9%) and is particularly high in Greater Taree (4.1%) compared with NSW (1.6%).¹⁰

Table 2: Index of social and economic advantage and disadvantage – MidCoast Region

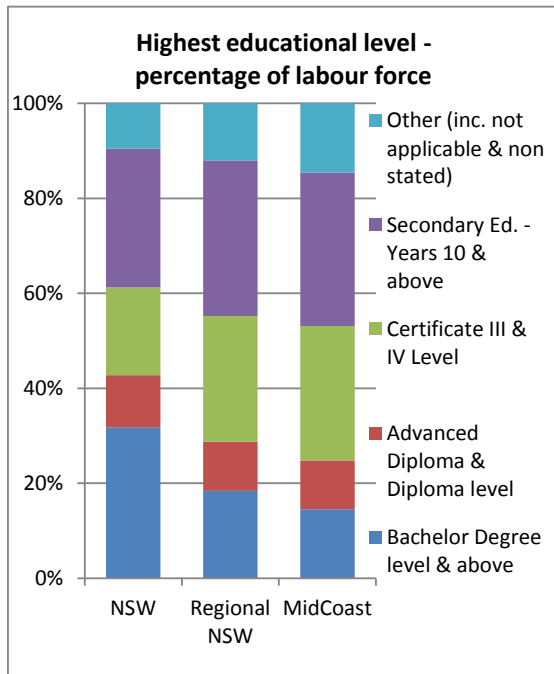
	SEIFA index of social and economic advantage and disadvantage by LGA ¹	Percentile ranking in NSW	Percentile ranking in Regional NSW
Gloucester	937	31	43
Great Lakes	920	17	23
Greater Taree	906	8	10

1. SEIFA Index 2011 — Median value for NSW LGAs was 959 and Regional NSW LGAs was 942.

Consistent with the above findings, the education attainment of the workforce is lower than comparable regions of NSW with a significantly lower proportion of people having obtained university education or diploma level qualifications (NSW 43%, Regional NSW 29%, MidCoast Region 25%). As

with other regions, the unemployment rate is higher among those with lower educational attainment.

Figure 11: Education level of labour force

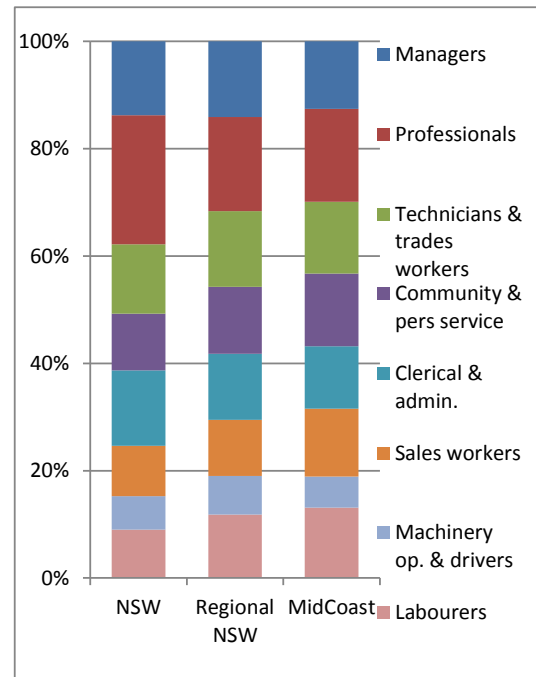


Source: ABS 2016 Census of Population and Housing

There are also notable differences in the predominant types of occupations held.

Relative to the rest of NSW and Regional NSW, a greater proportion of people in the MidCoast Region work in occupations described as labourers, sales workers and community and personal services workers.

Figure 12: Workforce mix



Source: ABS 2016 Census of Population and Housing

Industry analysis

Overview

A snapshot of the MidCoast Region's employment by industry is provided in Figure 13. The highest employing industries are *Health Care and Social Assistance, Retail Trade* and *Accommodation and Food Services*. The employment mix by industry has changed significantly over the last 15 years (see Figure 21 in Appendix 1). The most notable changes in employment since 2001 have been a large (around 2,000) increase in *Health Care and Social assistance*, a significant decline (around 500) in *Manufacturing* and a decline in *Agriculture, Forestry and Fishing*. The Commonwealth Department of Employment forecasts that these trends will continue (see Table 7 in Appendix 1).

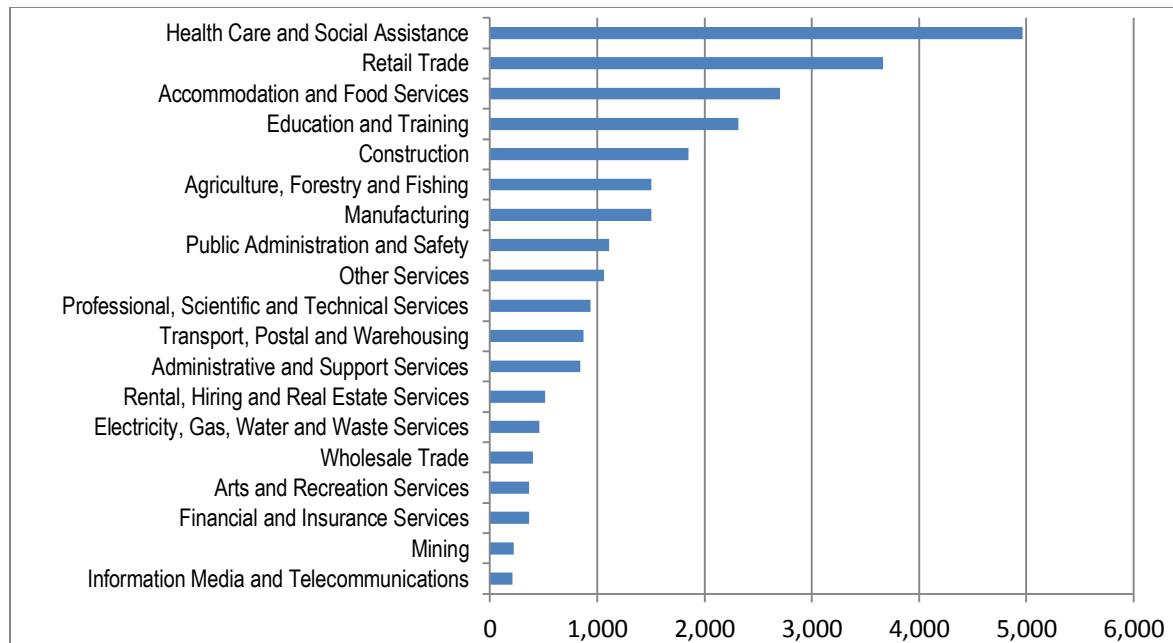
For the purposes of regional development it is useful to classify industries as:

- engines — industries that bring money into the Region (e.g. Agriculture) and that drive the local economy;
- enabling — industries that support the engines (e.g. Veterinary services to Ariculture); and,
- population serving — industries that support the local population (e.g. Retail).

As is reflected in the figure above, many people are employed in population serving industries (e.g. Retail trade, Education and Public Administration and Safety). However, typically the fortunes of the population serving industries depend on the success of

the engines and therefore it is useful to focus on the engine sectors that drive growth.

Figure 13: Employment by industry in the MidCoast Region



Source: ABS 2016 Census of Population and Housing, based on place of work

Note: 1. Industries are classified according to standard ABS industry classifications. 2. The number employed will understate the true number due to missing records and missing data (relating to industry and place of work). Data on some industries may not be accurate for seasonal industries because the census is taken at a point in time (during August). Furthermore it reflects the employment in the main job only.

An indication of the engine industries can be found by examining the value of exports from the Region by industry. This is summarised in Table 3 for selected key industries.

Agriculture, Forestry, Fishing & related processing and *Mining* contribute to over 55 per cent of the Region’s exports. Within the former, the key sectors are Agriculture (which includes the key industries of Dairy, Beef Cattle and Poultry) and *Meat & Meat Product Manufacturing*.

Many industries are closely related — for example, an increase in Beef Cattle output will lead to an increase in exports of the Manufactured Meat Products.

Exports, as measured in the table, are not a good guide for measuring the contribution of some sectors in bringing money into the Region. For example, *Aged Care and Social*

Assistance industry has minimal export value; however, retirees migrating to the Region can bring significant wealth and income with them. Another limitation is that the standard industry classifications do not neatly align with the key engine sectors of interest. Additional analysis is used to measure the impact of tourism (the visitor economy).

The table also lists each industry’s Gross Value Added (GVA) which is the contribution industry makes to Gross Regional Product (GRP). Industry GVA is closely aligned to the number of Full Time Equivalent (FTE) employees employed in the industry. The GVA per FTE is reasonably similar by industry; a key exception is *Mining* which is substantially higher, reflecting the significant capital investment and higher wages in Mining.

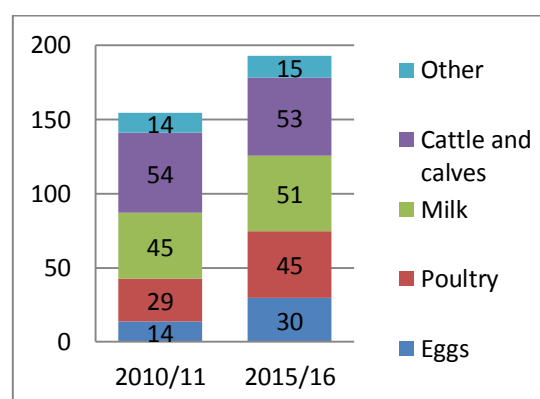
Table 3: Exports and Gross value added (GVA) for selected industries for the MidCoast Region

Industry	Exports \$m	Exports as % of Region total	GVA \$m	GVA as % of Region total	GVA per FTE
Agriculture	147	17.3%	127	3.8%	\$112,094
Meat & meat product manufacturing	66	8%	22	0.7%	\$68,096
Aquaculture & fishing	6	0.8%	49	1.5%	\$186,902
Processed seafood manufacturing	29	3.4%	8	0.2%	\$97,530
Forestry related	15	1.8%	28	0.8%	\$117,901
Other food product manufacturing	4	0.5%	10	0.3%	\$71,787
Agriculture, forestry, fishing & related processing Total	268	32%	243	7.3%	\$112,000
Mining	210	25%	145	4.4%	\$362,287
Transport & logistics	91	11%	157	4.7%	\$145,795
Other manufacturing	76	9%	120	3.6%	\$139,452
Accommodation and food services	64	8%	153	4.6%	\$75,185
Professional & technical services	32	4%	120	3.6%	\$120,951
Aged care and social assistance	1	0.1%	175	5.3%	\$85,416
Other	109	13%	2,216	67%	155,700
Total	851	100%	3,330	100%	\$139,786

Source: CERD IO Tables

Figure 14 shows additional data on the value of the agricultural commodities produced in the Region. The main industries are Beef Cattle, Dairy and Poultry (for Meat and Eggs). Much of the output would be for export out of the Region (in the case of Beef after local processing) suggesting that the true value of Agriculture exports is greater than indicated in the above table. Since 2011 (the date of the last Agricultural Census), the value of Poultry production has grown significantly while the value of output of other sectors has largely been stable.

Figure 14: Value of agricultural commodities produced in the MidCoast Region (\$m)



Source: ABS Agricultural Census (2010/11 & 2015/16)

Specialisations

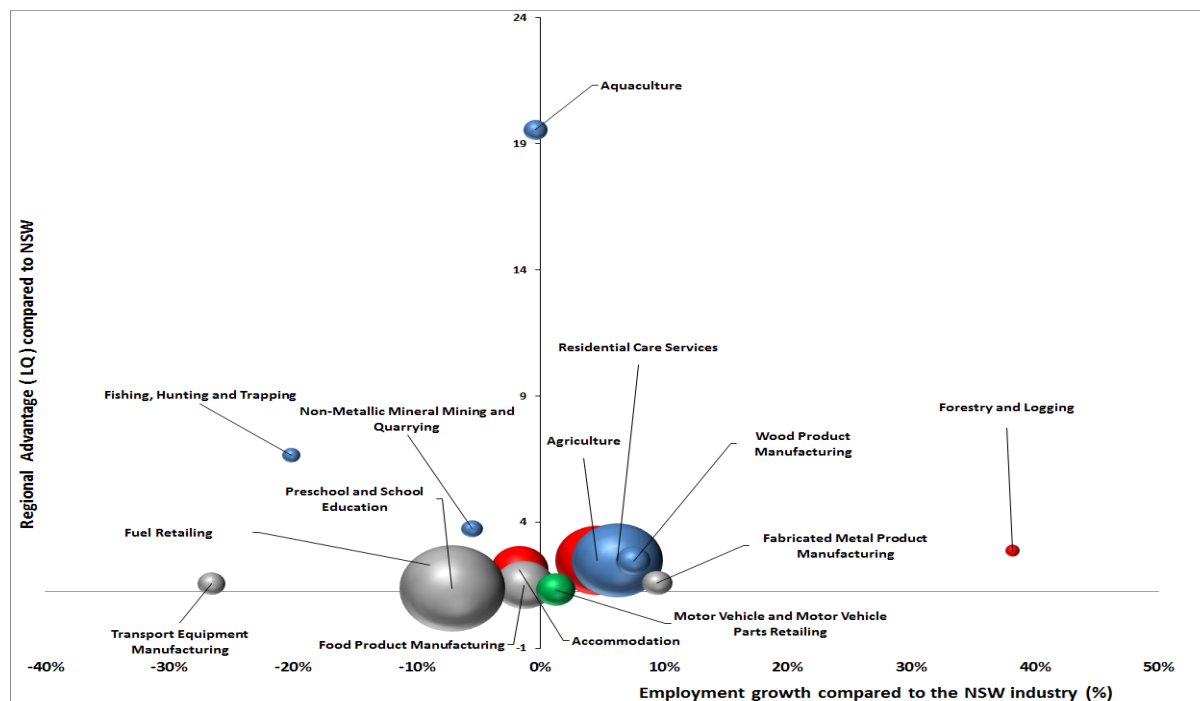
In analysing engine industries it is important to consider the extent to which the Region has a specialisation in the industry. CERD research¹¹ has shown that regions are becoming increasingly specialised in terms of their engine industries.

An indicator of industry specialisation is found in the relative concentration of regional employment in that industry.¹² This is measured by the employment location quotient (LQ) which is the industry's employment share in the Region divided by the industry's employment share for NSW. For example, a value of 2 means that the share of those employed in the industry in the Region is twice that of the share of those employed in the industry in NSW. The employment LQs and employment growth for selected industries is illustrated in the bubble diagram (Figure 15) below. The size of the bubble represents the number of people employed in the industry.¹³ The colour of the

bubble indicates whether the industry is likely to be an engine industry (red), an enabling industry (orange) or a population serving industry (white). The position on the horizontal axis indicates the percentage employment change since the last Census of Population and Housing (between 2011 and 2016). The position on the vertical axis shows the relative concentration as measured by the employment LQ.

Of note, 'Accommodation and Food Services' is used as a proxy for Tourism. Aged Care is used as a proxy for the retiree sector. As reflected in Figure 15 both of these sectors are large employers, have been growing in significance and employ relatively more people in the MidCoast Region than NSW. 'Agriculture, Forestry and Fishing' is another significant employer and engine industry. Despite a recent downward national trend, the employment in this sector grew over the last 5 years in the MidCoast Region.

Figure 15: Employment by sector – growth and relative concentration



Source: ABS 2011 & 2016 Census of Population and Housing. Note: For determining the rate of employment growth, some imputed data from the 2016 Census data was excluded so as to improve comparability with the 2011 Census data. See <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2901.0Chapter47402016> for more detail. Related processing refers to activities involving processing of the relevant commodity (e.g. seafood processing for aquaculture & fishing).

In understanding regional industry specialisations, it is useful to consider the relative growth (or decline) of an industry. Growth in an industry in a region may be in response to overall growth in the economy, or it may reflect growth in the industry across all NSW regions, or it may be a consequence of the local industry effects.

Table 4. The shifts have been expressed in percentage terms. For brevity, the state and industry shifts have been combined. For example, the industry category of *Accommodation and Food Services* directly employed 2,704 people in the MidCoast Region in 2016, with an LQ of 1.4. Since 2011, employment in this industry grew by 6.3 per cent in the Region and by 8.9 per cent in NSW. Therefore, the local effect was to *shrink* by around 2.6 per cent relative to the state benchmark for the industry. A positive local effect would indicate the Region is employing an increasing share of the state employment in the industry.

Table 4: Shift share analysis for the MidCoast Region

Industry	Employed 2016	LQ relative to NSW 2016	% growth (2011 to 2016)	State + Industry effect %	Local effect %
Agriculture, fishing, forestry and related processing	1,991	2.4	2.6%	-4.0%	6.7%
<i>Aquaculture, fishing & related processing</i>	222	16.7	-1.4%	13.0%	-14.4%
<i>Forestry, logging & related processing</i>	169	4.4	19.5%	-4.5%	24.1%
<i>Dairy & related processing</i>	308	6.7	-1.3%	-4.5%	3.2%
<i>Beef cattle & related processing</i>	871	5.3	-9.7%	0.0%	-9.6%
<i>Poultry Farming</i>	134	5.7	74.3%	50.6%	23.8%
<i>Horticulture & related processing</i>	119	1.0	19.8%	1.5%	18.3%
Aged & other residential care services	1,445	2.5	21.2%	12.7%	8.5%
Manufacturing (excluding agri-related)	935	0.8	-31.3%	-30.7%	-0.6%
Accommodation and Food Services	2,704	1.4	6.3%	8.9%	-2.6%
Professional, Scientific & Technical Services	938	0.4	-1.5%	7.9%	-9.4%
Construction	1,853	0.8	3.1%	11.2%	-8.1%
Road Freight Transport	312	1.0	-16.4%	-31.1%	14.7%
Mining	220	0.9	-35.3%	-6.7%	-28.6%

To isolate these different effects, a technique called 'Shift Share Analysis' is used to decompose an industry's growth (shift in employment) into a NSW State effect, a NSW industry effect and a local effect.

- The results of this analysis for selected industries are summarised in

For example, as illustrated in this table, since 2011 employment in:

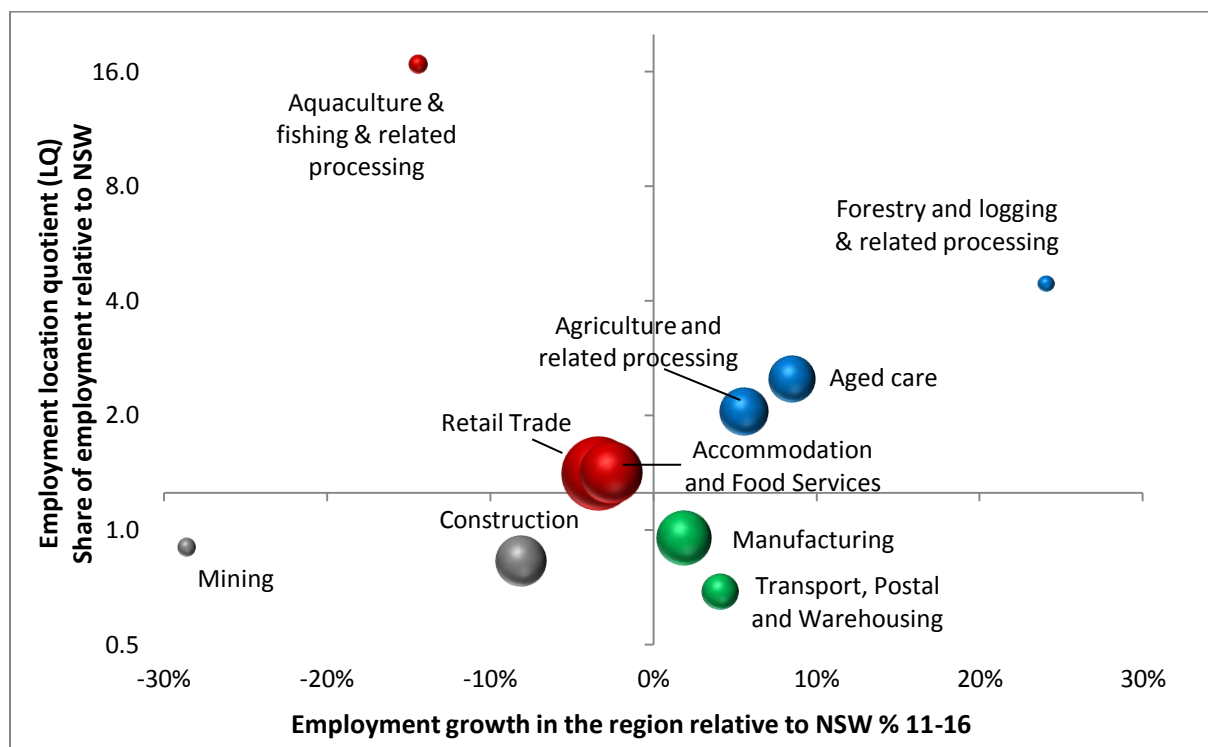
- Beef cattle & related processing* has fallen in the MidCoast Region but remained steady elsewhere
- Aged & other residential care services* has grown rapidly in NSW but significantly more so in the MidCoast Region
- Manufacturing (excl. agri-related)* has fallen but at a similar rate to elsewhere
- Accommodation and food services* has grown but a lower rate than elsewhere.

Source: ABS 2011 & 2016 Census of Population and Housing. Note: The 'Employed 2016' and 'LQ relative to NSW 2016' values include imputed numbers. To facilitate comparability with 2011 data, the data in other columns exclude imputed values. (See [here](#) for more detail). See also notes below Figure 13 and Figure 15.

Figure 16 shows a revised 'bubble' figure that incorporates the local effect of the shift share analysis as the horizontal axis. In this figure, the colour of the bubbles reflects whether employment in the industry has grown (Blue and Green) or shrunk (Red and Grey) relative to the NSW industry average and whether there is a relatively high (Blue and Red) or low

(Grey and Green) concentration of employment in the industry. The industries coloured blue are regional specialisations and since 2011 employment in these industries in the Region has grown faster than in the NSW and consequently the Region employs an increased share of the NSW employment in the industry.

Figure 16: Employment by sector – relative growth and relative concentration



Source: ABS 2011 & 2016 Census of Population and Housing. Note: See note below Figure 15.

Key industries

Based on the prior analysis and consultations, the following industries were identified as regional specialisations that are important to the local economy.¹⁴

Agriculture

Beef cattle

Beef cattle farming and related processing together form a major industry cluster in the MidCoast Region, directly employing around 870 people. The Wingham Beef abattoir in Wingham is a major local employer that processes local product and sources additional product from elsewhere. The abattoir is export licensed and exports around 70-80 per cent of the meat processed. Major export markets include Japan, USA, Republic of Korea, South Africa, Brazil, Chile, Europe, Taiwan, Canada, Mexico, Ukraine, Indonesia and Switzerland.

Dairy

The dairy industry was once the Region's largest industry and employer. The industry is still very significant today. There are over 150 farms employing around 300 people. The coastal agricultural lands are highly suitable for dairy cattle.



Poultry

The poultry industry employed 134 people in 2016 in the Region (most in egg production) an increase of around 75 per cent since the 2011 Census of Population and Housing. Due to growing demand, the industry is likely to continue to grow.

Forestry

The Forestry industry is a significant industry in the Region generating work in harvesting, transportation and saw milling. Forestry and logging (including Forestry and Logging, Forestry Support Services and Log Sawmilling and Timber Dressing) directly employed around 170 people in the Region in 2016, an increase of 26 people from 2011.¹⁵ The industry is a regional specialisation. The industry employment LQ is 4.4, and industry employment grew substantially faster than the industry average.

Forestry Corporation harvest hardwood forest and softwood plantations located in State forests in the western parts of the Region. There are saw mills in Wingham that process wood harvested.

Aquaculture and fishing

Aquaculture, fishing and related (seafood) processing directly employed 222 people in 2016.

Aquaculture — specifically oyster farming — is a regional specialisation. Wallis Lakes is by far the largest producer of Sydney Rock Oysters in NSW. In 2015/16 Wallis Lake accounted for 29.4 per cent of production in NSW and 27.5 per cent of the value of production.¹⁶

Employment in aquaculture grew at a lower rate than the rest of the State. However, this is in part due to temporary adverse impacts from flooding and related environmental shocks.

Currently, fishing in the Region is wild-catch fishing largely for local consumption with a small amount of export to markets in Sydney.

Manufacturing

Manufacturing (excluding agri-related processing) is a significant industry in the MidCoast Region employing 935 people in 2016. The MidCoast Region is home to a number of specialised manufacturing businesses, primarily located in Taree and Gloucester. Examples include boat manufacturing, electrical and mechanical solutions for mining and other applications and speciality camping products.



Mining

Mining is a significant industry within the Gloucester area. There are two existing open-cut coal mines, located at Stratford, 10km south of Gloucester and Duralie 20km south of Stratford.¹⁷

In 2016 the mining industry directly employed 220 people, a reduction of 110 people from 2011. According to the estimation by CERD (Table 3), the industry contributes 25 per cent to regional exports; however, a significant portion of the export value will leave the Region in the form of returns to the mine owners and payments to contractors who reside outside of the Region.

Road freight transport

Road Freight Transport is a significant industry employing 312 people in 2016. With an employment LQ of 1 it is not a regional

specialisation but nevertheless an important industry given the Region's location.

Aged care and social services

Aged care is a regional specialisation that is experiencing strong employment growth. The Region also has a high employment LQ (1.28) and relative strengths in other social assistance services. Through Government assistance, this sector is a source of income for the Region and is an important contributor to the community welfare.

Professional, scientific and technical Services

The Professional, Scientific and Technical Services sector employed 938 people in the Region in 2016. The LQ is low (0.4) and employment growth is slightly negative. Nevertheless, building on the Region's attractive lifestyle and location the sector may grow with improved telecommunications.

Tourism

Tourism is clearly an important industry to the MidCoast Region but a difficult industry to analyse. Key industry data is based on what good (or service) is produced (or provided), whereas Tourism is defined by who consumes the good or service. CERD has estimated that the Tourism sector directly employs around 2,500 Full Time Equivalent employees in the MidCoast Region. As with other industries, there is indirect employment.

Destination NSW provides estimates of visitation and tourism expenditure based on survey research. As summarised in Table 5, visitors to the MidCoast Region spent an estimated \$505 million in 2016. This expenditure is export income, which makes 'tourism' the largest export (engine) industry in the MidCoast Region.

Table 5: Tourism expenditure by area and type of travel for the MidCoast Region– annual average \$million

Type of visitor	4 years to YE Sept 2014				3 years to 2016	
	Gloucester	Greater Taree	Great Lakes	MidCoast Region	MidCoast Region	Percentage of total
Domestic overnight	43	115	312	470	409	82%
Domestic day trip	8	42	44	94	89	16%
International	0	3	3	6	7	1%
Total	51	160	359	570	505	100%
Proportion of MidCoast Region	9%	28%	63%	100%		

Source: Destination NSW LGA Profiles

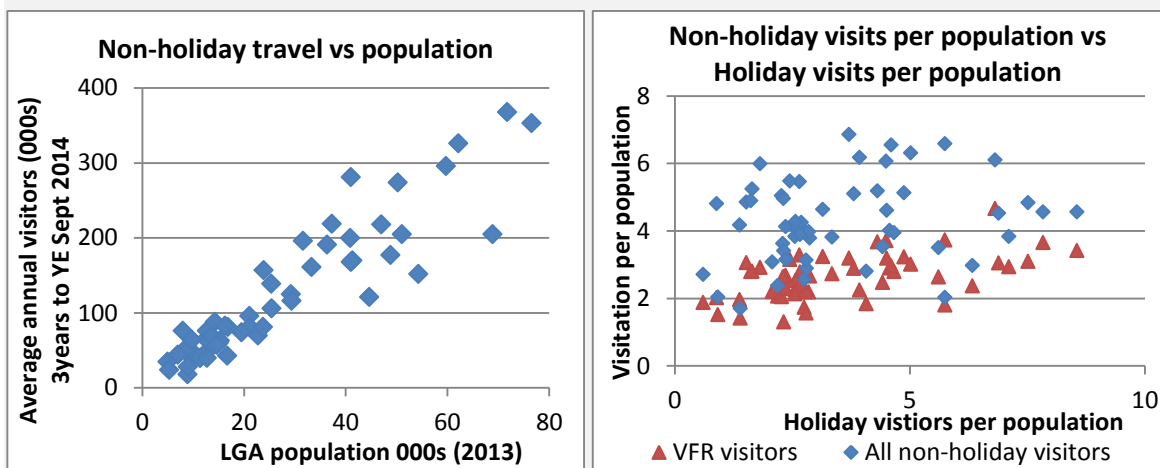
However, care is required in interpreting the data. Tourists have different reasons for visiting a region. Around 60 per cent of overnight visitors recorded their purpose of visit as being ‘holiday’. Around 33 per cent were Visiting Friends and Relatives (VFR) and the remainder (around 7%) for Business and other (this may include sporting events etc.).

The distinction is important in assessing the potential for growth. The volume of ‘holiday’ visitation can be influenced through product development and marketing whereas the remainder is more significantly determined by the size of the local population and the level and mix of business activity (see Box 1 below).

Box 1: Non-holiday visitation

The left-hand side figure below shows for each LGA in NSW the volume of non-holiday visitors against the LGA’s population. As can be seen from the figure, the non-holiday travel is largely determined by the size of the local population. The second figure examines how non-holiday visitation varies with holiday visitation. There is a slight positive correlation which suggests people will visit more for other purposes when the location is an attractive holiday destination. However, the relation is not strong.

Taken together, the figures suggest that there is some, however limited potential for a region to influence the non-holiday visitation.



Institutions

Institutions play a fundamental role in the economic development process, having either a positive enhancing effect or a detrimental or limiting effect. Thus, an appraisal of regional institutions, their capacity and capabilities, to enhance economic development is important.

A summary of institutions and their role in economic development within the Region is provided in Table 8 in Appendix 2. These include Government, Educational institutions that can build Human Capital (e.g. TAFE) and business and community organisations that are active in the MidCoast Region and are important for economic development in the Region.

MidCoast Council is the key unifying institution in the Region. The Council has an Economic Development Team (EDT) of three Full Time Equivalent (FTE) staff plus ancillary resources. The EDT works with the business community and private sector to facilitate and promote economic development and remove barriers to growth. The EDT's purpose is to

leverage current and emerging economic opportunities across the MidCoast Region, and to position and promote the Region as an excellent location to invest and grow a business.

The Council also has a Destination Management section whose purpose is to support tourism development and grow the visitor economy so that the MidCoast Region is recognised as a unique destination with a diversity of signature experiences. The Council provides cultural facilities (Art Gallery & Entertainment Centre) ensuring a diverse program of culturally enriching activities and experiences are available.

There are eight local business chambers that are unified under a single (recently formed) MidCoast business chamber (the directors of which are representatives of each of the local chambers). The new business chamber has strong links with Council and has proposed forming a local economic development committee to work with Council.



Infrastructure

Transport infrastructure

Roads network

The Pacific Highway which connects the south and north of the Region is the most significant and critical road-infrastructure in the Region. The highway is dual carriageway from Port Macquarie through to Sydney and provides fast access for residents, tourists and freight between the Region and major centres on the coast.¹⁸



Other key roads in the Region include:

- The Lakes Way — a coastal route that connects Forster–Tuncurry to the Pacific Highway near Taree in the north and Bulahdelah in the south.
- Thunderbolts Way — a regional road connecting the New England Highway and townships in the New England Tablelands to Gloucester and further to the Pacific Highway / Port of Newcastle. The road is an important route for freight (in particular logging) and tourist traffic.
- Bucketts Way — a regional road connecting Gloucester to the Pacific Highway in the South and branches in the north to service the Wingham / Taree area with a connection to the Wallanbah Road / Avalon Road network. It is part of the route linking the coast to the New England North West region. It is also a key alternative route to the Pacific Highway in the event of a major incident.
- Wallanbah Road and Avalon Road from Krumbach to Nahiab — these roads link Bucketts Way to the Pacific Highway and complete the connection of Gloucester

to Pacific Highway including links to Nahiab and Forster-Tuncurry.

The road network in the MidCoast Region is very large relative to the population of the Region¹⁹ and the cost of maintaining this infrastructure has been a core issue for the amalgamated Council. There is a current funding backlog of \$180 million and a funding gap of \$5 million per year. To help address these issues the Council has secured NSW state support funding and a special rate variation.

The state of the local road network was identified in the responses to the online survey as a key barrier to economic development in the Region. The main concerns relate to the poor state of the roads. Other concerns include the congestion during peak periods in Forster-Tuncurry.

Rail

The rail line (known as the North Coast Line) that connects Sydney to Brisbane passes through the MidCoast Region, with stations at Gloucester, Wingham and Taree.²⁰

Coach services are available that connect travellers in Forster-Tuncurry and townships to the stations in Taree and Broadmeadow (near Newcastle). However, the transit times are a concern; currently the trip from Taree to Sydney (Central station) takes over 5.5 hours. A number of survey recipients expressed a desire to see a higher speed (e.g. 2.5 hour) rail service.

The line is primarily used to transport coal from the mines in the Gloucester basin to the Port of Newcastle, and for the transport of general freight.

Airport



Taree Regional Airport services the MidCoast Region²¹ with direct double regular passenger transport (RPT) services between Taree and Sydney. There has been a downward trend in passengers using the airport. In 2016/17 there were a total of 13,617 paying passengers, slightly more than half of those using the services in 2000/01.²² FlyPelican, who recently took over from Rex Airlines as the sole provider of RPT services, is looking to reverse the trend by offering direct services between Sydney and Taree.

In 2017 upgrades to the airport included expanding the apron and installing a precision approach path indicator (a visual aid for planes to land in all weather conditions).

With the upgrading of the Pacific Highway, Newcastle Airport at Williamstown is readily accessible for many MidCoast Region residents.²³ It offers many more services (around 8 times as many flights) and transports around 90 times as many passengers as Taree airport.²⁴ Newcastle Airport is working towards the introduction of international flights. Port Macquarie Airport to the north is also a convenient airport that offers RPT services to Sydney and Brisbane.

Taree Airport is home to an Aviation Business Park. Recently completed, the facility provides businesses and individuals with the opportunity to secure hanger space. The aviation business park features twenty one lots with a typical size of around 850 square metres. Expected uses include warehousing,

recreational flight experiences, couriers, freight depots, and light manufacturing.

Ports and Marine Infrastructure

There are no commercial shipping ports in the MidCoast Region. However, the Pacific Highway provides easy access to the Port of Newcastle (170km south) and to Port Botany (320km) as well as the option to transport goods north to the Port of Brisbane (630km). Within the Region, there are maritime facilities in Tuncurry and Tea Gardens which are used primarily for commercial fishing and recreational boating. These sites have been reviewed as part of the NSW Department of Primary Industry's Regional Ports Strategy Development (Ports Strategy project) which is currently in progress.

The Tuncurry facilities include a timber wharf and several finger jetties for the local fishing fleet. The facilities are earmarked for a significant renewal to address existing issues and capture opportunities.²⁵ The Ports Strategy project notes that the port is captured under Crown Lands' Draft Forster-Tuncurry Crown Harbour Project, which *'is a 30-year vision for the Forster-Tuncurry waterfront that strives to capture the full potential of the harbour through a suite of recreational, commercial and tourism related experiences and to support the social and economic development of the area'*²⁶

In Tea Gardens, maritime facilities include a timber jetty and a jetty/pontoon maintained for the local fishermen's co-operative and recreational uses.²⁷ Regular ferry services operate between Tea Gardens and Nelson Bay. The Port Strategy notes that potential infrastructure projects relating to the port include the Marine Drive wharf and pontoon upgrade, Anzac Park boating access improvements (dinghy storage and launching facility), Odgen Street public jetty upgrade and the Tea Gardens Hawks Nest Foreshore Redevelopment Master Plan.²⁸

There were no issues with the ports infrastructure raised in the survey.

Utilities

Water

The Region's water and wastewater assets are managed by the MidCoast Water Services division of MidCoast Council. The entity manages 16 sewerage plants and 5 water supplies. The current asset value is around \$1.4 billion.

The water infrastructure is in place in most locations to support growth. Going forward the core issues are:

- Renewal of Gloucester infrastructure much of which is at the end of its useful life.
- Improving water security for the Great Lakes region through an investment in ground water supply near Nabiac.

Telecommunications

The NBN has been partially rolled-out to the MidCoast Region. As at November 2017:

- The key townships of Taree, Wingham, Old Bar, Barrington, Gloucester, Stroud, Forster-Tuncurry and Nabiac have access to NBN via fibre to the node (FTTN) in the town centres and fixed wireless technology outside of the townships.
- The build has commenced in some areas including areas near Bluey's Beach (FTTN) and along the northern stretch of Bucketts Way (fixed wireless).
- The NBN is not available in Hawks Nest-Tea Gardens and other areas in the south of the Region.

Mobile phone coverage is available through all the major communication carriers (Telstra, Optus and Vodafone). However, there are a number of black spot areas in the locations outside of the main population centres.

Several survey respondents raised concerns with the communications infrastructure in the MidCoast Region including speed and connectivity issues with the NBN service where it is available.

Energy

Power to the Region is provided by:

- TransGrid, which owns and operates the high voltage transmission network that delivers electricity to the Region, and
- Essential Energy, which owns and operates the distribution network (including sub-transmission and zone-substations as well as the feeder lines)

TransGrid is planning some upgrades (including capacity augmentation and renewal of the Taree substation).²⁹ The Essential Energy network is divided into three supply areas relating to Taree (incorporating Forster-Tuncurry), Stroud (incorporating Booral, Gloucester and Bulahdelah) and Hawks Nest.

There have been some reported issues relating to insufficient energy supply in the Gloucester region but at present there are no planned upgrades.

There is no reticulated natural gas and no large-scale energy generation in the MidCoast Region.

Employment lands

In the MidCoast Region there are a number of existing industrial precincts. There is industrial zoned land in Forster, Tuncurry, Tea Gardens, Gloucester, Stratford, Wingham, Taree, Taree South, Brimbin, Old Bar and Harrington. Most of the industrial zone land is privately owned.

Notable planned and recent developments of employment lands include:

- The recently developed Taree Airport Business Park
- The Northern Gateway project (see below)
- The Stratford Industrial Park (in development) — a 135 hectare park located on the Bucketts Way 15 kilometres south of Gloucester near Stratford. It is advertised as 'a high quality, attractively designed industry park being developed near Gloucester which will focus upon the effective use of

significant energy resources and road and rail transport infrastructure.’

- Brimbin development — New industrial lands will be included as part of the Brimbin development, a new town to be located 8km north-east of Taree.

There is a current shortage for light industrial activities at existing centres adjacent to the Pacific Highway. Opportunities to expand the available industrial land are being considered by Council.

Concerns have also been raised relating to industrial land in Gloucester. While industrial land is available and reasonably priced there have been issues raised regarding the infrastructure development costs relating to water services and electrical supply.

Northern Gateway project

The Northern Gateway project is a freight/transport hub to be developed near the Pacific Highway and Taree airport. Truck drivers delivering freight between Sydney and South East Queensland will stop at the facility to switch loads. This will enable them to focus on smaller sections of the route (e.g. the return journey from Taree to Sydney)³⁰ and facilitate more efficient freight transport between Sydney and Brisbane.

The hub is strategically significant to Taree and the surrounding region. The direct effect of the project is to increase the amount of freight business located in Taree. It is expected that many truck drivers will base themselves in Taree.

The proposed hub should also significantly reduce freight costs to and from the Taree region as it will allow freight in and out of Taree to be added to loads as they are being switched. The reduction in freight costs will provide Taree and the surrounding regions with a shipping cost advantage in delivering freight to and from major centres. Coupled with the low cost of land and labour, this hub is likely to encourage the establishment of transport and logistics businesses and other industrial businesses seeking low freight costs in Taree.³¹

The facility will require new road infrastructure to connect the facility to the existing road network.

Buildings and other

Educational (vocational) infrastructure

Of relevance to economic development, the Region’s key education infrastructure in the MidCoast Region includes:

- TAFE NSW campuses in Taree and Tuncurry —
 - The Taree campus is advertised as ‘having state-of-the-art facilities including a horticultural glass house, a metals and engineering 3D printer which is available for commercial use and training, full automotive workshops, integrated childcare learning facilities for community playgroups, and an IT CISCO Training Centre.’
 - The Tuncurry campus is a modern facility (established in 2011) that shares the site and some facilities with a junior and senior college.
 - Gloucester has no TAFE facilities and no coordinated transport facilities to TAFE services in Taree and Tuncurry.
- The University of Newcastle operates a Department of Rural Health in Taree via Commonwealth Government funding under the Rural Health Multidisciplinary Training Programme.
- The University of New England operates a regional study centre in Taree.
- Other vocational infrastructure includes WEA Coast Community College in Tuncurry.

There are no university campuses in the MidCoast Region however there are a number of university campuses in Port Macquarie and Newcastle

Health care infrastructure

The key health facilities in the Region are:

- The Manning Hospital in Taree — a large regional public hospital with an emergency department. The hospital is going through a significant redevelopment (expected to be completed in late 2018) that will include a new, purpose-built facility to provide enhanced cancer care and renal dialysis services.
- Forster Private Hospital — the hospital advertises as offering accommodation for 69 patients, 2 Operating Theatres, Day Surgery Unit, Oncology Unit, Inpatient Rehabilitation, Day Therapy Programmes and Hydrotherapy Pool.
- Mayo Private Hospital — An 81-bed acute medical, surgical, rehabilitation and mental health facility in Taree
- Bulahdelah Hospital — A small regional hospital with an emergency department.
- Gloucester Hospital — A small public hospital with an emergency department.
- Wingham Hospital — A specialist rehabilitation hospital.

The Region is home to many aged-care facilities including retirement villages and nursing homes.

Lifestyle and tourism infrastructure

Notable infrastructure supporting lifestyle and tourism includes:

- Tourism and culture centres
 - Manning Entertainment Centre
 - Manning Regional Art Gallery
 - Museums in Wingham, Cundletown, Tinonee and Nabic
 - Gloucester Art Gallery.
- Showgrounds in Gloucester, Taree, Forster, Wingham, Stroud and Nabic.
- Sport facilities including Wingham Sporting Complex and Gloucester Hydrotherapy Pool.

Industry specific infrastructure

Other important industry specific infrastructure includes

- Saleyards – Gloucester (operated by MCC), Nabic (operated by MCC) and Taree (Private).
- An abattoir for beef cattle in Wingham owned and operated by Wingham Beef.
- Sawmill facilities.
- Marine facilities managed by fisherman coops in Taree and Tuncurry.



3. Considerations – Endowments, weaknesses, risks and trends

Regional endowments

In the context of the Regional Economic Development Strategies, strengths are described as endowments — tangible strengths and assets that a regional economy possesses and that can be leveraged to develop economic opportunities.

Endowments include natural features (e.g. climate, agricultural land and water), built infrastructure (e.g. roads and airports), institutional strengths (e.g. established industry clusters, local university) and other features that have some permanency.

Endowments play a key role in the economic development of each region. The Centre for Economic and Regional Development, in its Regional Economic Enablers Report (2016) found that

“the future of individual regional economies is inexorably linked to their natural endowments, and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed”.

A region seeking to encourage economic development needs to concentrate on the growth enablers of endowment-based industries, as well as building local leadership capacity in order to capitalise on the opportunities that the Region’s endowments present.

The MidCoast Region is diverse and consequently relative strengths of each of the Region’s endowments may vary in part by location within the Region.

Land, water and related assets

The Region has a varied topography. The Region has good agricultural land and reliable

rainfall which produces pastures that are highly suitable for dairy and beef production. The rural land is suitable for other agricultural industries including poultry farming. There are hardwood and softwood lands located in the western sections of the Region which provide the basis of the forestry industry.

The MidCoast Region has several estuarine areas highly suitable for aquaculture. These include areas around the Manning River, Wallis Lake and Port Stephens.

The Gloucester coal basin, located in the west of the Region extending from Gloucester to Stroud, (55km long by 15km wide), provides the foundation for the coal mining industry and was identified as a source of coal-seam gas.

There are a number of key industry specific assets that are used for processing product from the land and from water industries. These include the beef abattoir located in Wingham (which is export licensed), private Seafood processing, saw Milling facilities and Mining infrastructure.

The use of natural resources for productive purposes is supported by good transport infrastructure for delivering product to market. The Pacific Highway and other regional roads are key assets which enable Agriculture, Forestry and Fishing products to be delivered to markets outside the Region. The rail-line is an important endowment for the coal mining industry. Coal from Duralie is transported to the coal handling and preparation plant at Stratford, with the coal then being transported by rail to the Port of Newcastle.

Infrastructure and location

The main population centres in the MidCoast Region are all within a short distance to the Pacific Highway which provides direct access to the Sydney market (3-4 hours) and to the Port of Newcastle and Newcastle Airport (around 2 hours). The Region (via Gloucester, Wingham and Taree) has rail (North Coast line) and air services (via Taree airport, Williamstown airport located a short distance to the south and Port Macquarie to the north). Connectivity to other markets is enhanced by the NBN which has been rolled-out in key townships in the Region.

Taree's location (adjacent to the Pacific Highway and proximity to Sydney) renders it a convenient location for freight and transport operations. This advantage will increase with the development of the Northern Gateway transport and logistics hub, which is expected to result in significantly reduced freight transport costs in and out of the Region.

Gloucester is also conveniently located and has a rural setting. It has good access to key markets to the South (less than 3.5 hours to Sydney and 1.5 hours to Newcastle airport) and is a gateway from the coast to the New England North West region.

The availability and affordability of land (for employment and non-employment uses) is a key positive for the Region, particularly for industry wishing to establish in Gloucester and Taree.

Lifestyle and amenity

The MidCoast Region has significant endowments from a lifestyle and an amenity perspective that underpin a range of people-based industries.

The MidCoast Region has 192 kilometres of coastline, with key features including the Manning and Myall Rivers, Wallis, Smiths and Myall Lakes. The twin towns of Forster-Tuncurry are high profile, popular destinations. The coastal waters, lakes and rivers have multiple uses including marine park tourism, whale watching, recreational

fishing and recreational boating. In addition to tourism the coastal locations are popular for retirees and others seeking a sea-change lifestyle. The Manning River is an important asset that could be further leveraged in the development of Taree for tourism and lifestyle benefits.



The inland region including the township of Gloucester offers an attractive tree-change lifestyle, with good accessibility to the regional centres of Taree and the city of Newcastle. Inland notable natural features include Barrington Tops World Heritage National Park which is a popular destination during summer and winter and Ellenborough Falls, which is the second longest drop waterfall (200m) in the southern hemisphere. There are many other natural assets including National Parks, State Forests and Nature Reserves. The Region's natural assets are highly accessible with good road and tourist infrastructure.

For tourism, the Region is accessible as a day trip destination from the Lower Hunter and as a short breaks destination from Sydney, Central Coast, Hunter, Tamworth and Armidale regions. Gloucester's location on Thunderbolts Way is an advantage in

leveraging vehicle traffic travelling between the New England North West Region and Newcastle, Sydney and the Mid Coast Region.

Relative to other coastal regions to the North (e.g. Port Macquarie and Coffs Harbour), the MidCoast has a significant advantage in its proximity to Sydney and Newcastle. The driving distance from Sydney (3-4 hours) is a convenient distance for weekend escapes. Relative to coastal regions to the South (around the Central Coast and Lake Macquarie), land in the MidCoast Region is more affordable and less congested.

The Region has good services. Taree is an important regional asset as a key regional centre that includes a large regional public hospital, other health facilities, direct rail access and a local airport. The Region has good accessibility to higher education with TAFE NSW having good facilities in Taree and Tuncurry and university campuses in nearby cities of Port Macquarie and Newcastle.

The Region has developed a reputation as being supportive of people with care needs. The Region has good services for the aged and people with disabilities and employment

opportunities for people with disabilities (e.g. Valley Industries).

Other

Other less tangible strengths were identified as part of the consultation process. The successful amalgamation of the three LGAs appears to be a valuable strength. While diverse, the Region is well integrated with strong institutions. The amalgamated council has collective resources to allocate to economic development and has demonstrated greater capacity and leverage in working with NSW government. The local business chambers are particularly active in promoting the Region and working as a consolidated group.

The Region's appeal as a destination to get-away and relocate to has (anecdotally) led to a significant community of semi-retired and retired professionals who are active in supporting the Region. Such experience is valuable in supporting the development and growth of local businesses.

Weaknesses and challenges to address

Weaknesses can be limitations that inhibit economic opportunities or be issues to be addressed.

Through consultation and a survey a number of weaknesses and challenges were identified. A summary of the survey results can be found in Figure 22 on page 56.

The key weaknesses/challenges identified are the following.

Infrastructure and utilities

- **Roads** — The road infrastructure was the most poorly rated factor in the survey with the large majority of respondents identifying roads as being a key weakness. The poor state of the Region's roads was commented on as an issue by many survey respondents and was

identified as a key disadvantage to rural development

- **Telecommunications** — As is the case in many other areas, there are reports of issues with the roll-out of NBN. Poor mobile coverage was also identified as a key weakness in rural areas
- **Energy** — Issues with the energy infrastructure were identified as an issue in areas around Gloucester
- **Water** — Availability and quality of water is seen as a regional strength — however the cost of developer contributions is a concern for some developers in the Gloucester area.

Labour force

- **Generational unemployment** — As noted earlier, a disproportionately high

number of children are being raised in families without employed parents fuelling concerns of generational unemployment

- **Access to skilled labour** — Issues of access to skilled labour was rated as a key weakness by many survey recipients. Issues appear to be related to the lack of higher education and migration of young people away from the Region
- **Access to training** — While there are good TAFE facilities in Tuncurry and Taree, access to TAFE education is difficult for people located in Gloucester
- **Transport options for youth** — A lack of public transport options has been raised as a potential barrier for youth employment and higher education.

Other

- **Planning and land-use regulations** — Difficulties with obtaining planning approval and inconsistencies in land-use regulations were raised as issues. Land-use planning is being examined through the ROLUS project and other local strategies (to be commenced)
- **Marketing** — A common perception raised is that the Region has not been sufficiently well promoted to date and that there is a lack of awareness amongst potential visitors, new residents and businesses about the attractions of the Region.

Issues and risks facing the Region

Through analysis and consultation (surveys and interviews), issues and risks to the economy were identified and examined. As part of the survey, respondents were asked to rate the significance of different risk categories. A summary of responses is provided in Appendix 3.

In considering risk it is useful to identify those risks which might justify some Government or community intervention. Some risks are best managed by individual firms.

Governance risks (including changes to regulation)

Governance and regulation at all levels (including changes in regulation) were identified by the business community as the most significant category of risk.

Key risks in this category relate to risk of unresolved land-use conflicts and changes in regulation.

Economic risks

Economic risks (e.g. changes in prices, exchange rates) are predominantly risks that do not require Government or community intervention. The exposure to economic risks

varies. The performance and subsequent output of key agricultural sector industries (beef, dairy and poultry) is sensitive to changes in prices for inputs and outputs.

The strength of the visitor economy is also exposed to economic risk factors. For example, a weaker economy leads to reduced spending on tourism. However, a weaker exchange rate may increase the number of people taking domestic holidays.



Production risks (changes in input costs, labour disruptions etc.)

On the whole, production risks are relatively low for the Region.

The most significant issues appear to be workforce related. An issue raised by participants in interviews, workshops and the survey is that service levels among local businesses vary greatly. Consequently, a risk (failed opportunity) is that the Region fails to reach its potential.

Other related issues raised include the lack of work opportunities for youth, generational unemployment and loss of young people to other locations. A lack of public transport for youth was also raised as a key issue.

Environmental risks

Overall, environmental risk did not rate strongly as an issue. This is despite the Region being subject to significant flooding in recent years.

Local Land Services evaluates risks to key agricultural and fishing industries. Agricultural industries are exposed to climatic risks. Periods of low rainfall lead to lower stock volumes. The aquaculture industry is exposed to changes in water quality.

Climate change and associated sea level rise is a potentially important issue. Forecast impacts of climate change include higher

temperatures, changes in rainfall (a decrease in winter and an increase in autumn and spring) and a higher fire risk.³² Associated sea level rise is potentially the most significant matter for coastal regions, leading to higher projected storm surge and oceanic inundation levels and a landward recession of unconsolidated (sandy) shorelines.

Societal risks (adverse community attitudes to development etc.)

Societal risks preventing the Region capitalising on its opportunities include the risk that:

- Local communities resist a greater influx of retirees. A related concern is that pensioners receive substantial discounts on rates with the risk that broader community cross-subsidises pensioner retirees.
- Property prices rise in coastal locations increasing to the detriment of local residents not in the property market.

The table below describes drivers of change (trends and forecast events) and potential implications for the MidCoast Region.

Trends and other drivers of change

Drivers of change (trends and forecast events) and the potential implications for the MidCoast Region were considered in evaluating threats and opportunities. These are summarised in the table below.

Table 6: Drivers of change and potential implications for the MidCoast Region

Driver of change	Potential implications for the MidCoast Region
Global trends	
Digital economy — the internet and mobile technologies are transforming production techniques, business models and operations, communication modes and consumer behaviour.	<ul style="list-style-type: none"> • Increased opportunities for local businesses to improve productivity and service to access new markets • Increased potential to attract businesses and professionals to operate from the MidCoast Region • Improvements in lifestyle and enabling industry services including health, education, financial and other services through on-line delivery • Increased competition from external businesses (e.g. internet shopping and service delivery) • Increased importance of reliable telecommunications

Driver of change	Potential implications for the MidCoast Region
	infrastructure.
<p>Increasing use of technology in production and manufacturing — changes including use of Ag-Tech, 3D printing, just-in time delivery</p>	<ul style="list-style-type: none"> • Opportunities for productivity improvements • Changing skill requirements to adopt new technology.
<p>Climate Change — including increasing variability and uncertainty in climate and weather patterns and an increase in sea-levels and extreme weather events. Projected regional impacts include:³³</p> <ul style="list-style-type: none"> • Increases in the maximum and minimum temperatures • Increases in autumn and winter rainfall. 	<ul style="list-style-type: none"> • Increased risk for agricultural producers and agricultural dependent industries and services • Increased risk of coastal erosion.
Australia / NSW changes	
<p>Changes in markets — including</p> <ul style="list-style-type: none"> • Growth of Asia. Increased demand for agricultural product driven by strong economic growth in Asia and India • Free Trade Agreements • Local changes. Increasing sophistication of demand. 	<ul style="list-style-type: none"> • Local prices more exposed to international markets • Growing demand for agricultural staples including meat and dairy • New sources of capital from overseas investors • Potential for new niche products and value-adding • Heightened community awareness and interest in ‘clean – green’ and locally produced products, creating opportunities for value-adding, niche marketing and premium pricing.
<p>Changing population dynamics — including:</p> <ul style="list-style-type: none"> • Aging population and workforce. • Generational change with ‘baby boomers’ moving into retirement and Gen X and Y becoming dominant in the work place • Increasing focus on work-life balance and quality of life. Diversified and growing cultural mix • Consumers are becoming more aware, sophisticated and demanding. 	<ul style="list-style-type: none"> • Increased number of retirees • Increased demand for health, aged care and allied facilities, services and labour force • Increase in travel by baby boomers, including an increase in the touring caravan and Recreational Vehicle markets. • Generational change and social trends to be reflected in investment and marketing strategies • Lifestyle and work-life balance is playing an increasingly significant role in decision-making and needs to be incorporated in the development of services. • Increase in ‘sea’ and ‘tree’ change market.
<p>Growth of disability sector — The National Disability Insurance Scheme has resulted in an increase in funding and a shift toward greater flexibility and competition in provision of services.</p>	<ul style="list-style-type: none"> • Potential to build on existing strengths and increase provision of support services for people with disabilities relocating to and visiting the Region • Potential to create tourism facilities and experiences that accommodate people who are frail, aged and/or disabled
<p>Changing work-force demands — including: increasing demand for professional and technical services and other skilled resource</p>	<ul style="list-style-type: none"> • Change in training and development needs • Risk of development hampered by lack of skilled resource • Lower demand for lower-skilled resources
<p>Changing energy market — energy costs within the Region are higher than Sydney.</p>	<ul style="list-style-type: none"> • Continued uncertainty • Higher gas prices may reduce relative disadvantage of no

Driver of change	Potential implications for the MidCoast Region
On-going uncertainty over energy markets.	<ul style="list-style-type: none"> gas connection • Business / community initiatives to reduce power consumptions / costs.
Improvements in transport and freight – improving road and rail infrastructure to facilitate freight movements; increasing utilisation of high productivity vehicles.	<ul style="list-style-type: none"> • Increasing use of high productivity vehicles - need to continue to invest to improve capacity / safety of the roads and remove pinch points. • Continue to explore rail opportunities
Increasing productivity of agriculture – arising from changing technology, improved land and water management, Increased intensification of livestock production.	<ul style="list-style-type: none"> • Potential for further reductions in on-farm labour • Changes in farming practices, including a shift to more intensive production methods (e.g. feedlots, glasshouses) • Growth in containerisation / intermodal services. • Establishment of new technology-based service providers and/or new products and services for existing businesses. • Changing skill needs within the agriculture and agri-business sectors. • Need for reliable, high speed, affordable internet / digital access to utilise emerging technologies.
Regional changes	
Growth of Newcastle – Newcastle is growing rapidly as a city and regional centre and is attracting significant investments in facilities. Developments include: <ul style="list-style-type: none"> • Cruise ship terminal • Expansion of Newcastle airport 	<ul style="list-style-type: none"> • Newcastle’s population growth can increase opportunities for businesses located in the MidCoast Region to service the Newcastle market • Cost of land and housing pressures may lead to businesses seeking to relocate
Mining sector changes –Including potential for existing mines to close within the next decade	<ul style="list-style-type: none"> • Impacts on local employment and development and associated flow on effects for local communities • Potential impact to local amenity. • Potential rehabilitation and reuse of mining leases for other employment purposes
Growth of Sydney economy and population – including increased cost of living pressures and increased cost of land	<ul style="list-style-type: none"> • Higher Sydney property prices increases wealth of retirees who may settle in MidCoast Region • MidCoast Region’s cost-of-land advantage increases.

4. Economic future of the Region

Long Term Economic Vision for the Region

The economic vision needs to align with the needs and wants of the community. The MidCoast Region vision from its (draft – in development) Community Strategic Plan (CSP) is:

“MidCoast is a unique place of environmental significance where our quality of life and sense of community is balanced by sustainable and sensitive development that supports economic growth”

Consistent with this community vision, the desired economic future for the MidCoast Region is for:

The MidCoast Region will have sustainable economic growth, founded on the region’s natural assets, amenity and location, while offering a healthy lifestyle and community connection.

It will be regarded as a desirable place to establish and grow a business while living an enviable lifestyle and be a premium location to visit, raise a family, settle and retire. The Region will particularly appeal to:

- businesses seeking an affordable and supportive business environment with proximity and connection to major centres
- skilled workers seeking a sea-change and tree-change lifestyle while maintaining good connections to Sydney, Newcastle and beyond
- self-funded retirees seeking a highly desirable but affordable coastal location with proximity to Sydney and Newcastle
- visitors wishing to escape the cities and enjoy the natural attractions of the area

- people (include those with care needs) seeking a supportive environment to live, work and visit.

Reflecting the Region’s diversity, the economic vision and reputation will vary by location across the Region.

- Taree — a thriving regional centre, with a strong industrial and commercial base that leverages its connectivity
- Contemporary Coastline — modern, connected communities, offering a premium coastal lifestyle and a destination of year-round appeal with an abundance of spectacular natural attractions
- Vibrant Rural Hinterland — a strong rural based economy adjoining key natural attractions centred on strong, communities well connected to regional centres, offering authentic country experiences and an excellent location for innovative business.

Consistent with this theme

- Council will be known as welcoming and supportive of businesses
- The business community will work collaboratively with Council and each other in addressing common issues and opportunities
- The local labour force will support the Region’s vision by establishing a reputation for quality of service; and
- The local community will embrace growth and innovation that is consistent with the community’s vision for the economy.

Economic Opportunities for the Region

The economic opportunities for the Region have been summarised according to opportunities that leverage:

- The natural land and water assets

- The people who chose the MidCoast Region as a desired location
- The infrastructure and location

Leveraging land and water

Agriculture

Agricultural industries including Beef Cattle, Dairy and Poultry are key industries for the Region and are expected to continue to be so in the foreseeable future.

- The Beef Cattle industry in the MidCoast Region (currently directly employing around 850 people) has potential to grow. The abattoir has capacity to process more cattle (and thereby employ more people). The main limiting factor is the supply of cattle. Local cattle production is largely determined by uncontrollable factors such as the exchange rate and climatic conditions. Wingham Beef also sources a substantial amount of cattle from the tablelands and other regions in NSW and Victoria. Improvements to the Thunderbolts Way, Scone Road and the Bucketts Way would facilitate greater volumes of beef being processed in Wingham.
- The fortunes of dairy cattle farming will largely be determined by market conditions.
- Due to growing demand, the Poultry industry is likely to continue to grow in the Region.

The growth of these industries will largely be determined by exogenous factors (i.e. outside the Region's control) such as climate and market prices. However, local factors are important, in particular, ensuring certainty around land-use planning and improving local roads. There are also opportunities to improve farming productivity through greater use of technology. Improvements in mobile telephony network would be a key enabler to improved productivity.

Forestry industries

The fortunes of the forestry industry are directly linked to the availability of forestry resource. Most logging occurs in State forests and no significant changes are expected in the MidCoast Region in the near future. The NSW State Government is looking to re-invigorate the industry which may lead to some expansion, particularly in terms of logging on private land.³⁴

Mining

The existing Stratford and Duralie mines have approval to operate to 2025 and 2021, respectively. While the decision about future mining is now outside of the control of the Region, it is important that the Region is prepared for the future.

Water - Aquaculture and fishing

Aquaculture

The MidCoast Region has a well-established Aquaculture industry. Nevertheless, there is strong potential for growing local supply to service existing Australian markets for which international imports are required to meet demand.

First, there is substantial potential to increase the volume of production, particularly from the area around the Manning River. Recent investment and production is low, relative to historical levels. Aquaculture within the river estuary of the Manning is vulnerable to the impact of flood events and periods of extended freshwater events resulting in intermittent loss of production. Furthermore, the southern entrance to the river is intermittently open and closed depending on river flows. In order to overcome the

vulnerability of Aquaculture and potential for increased production to periods of low salinity, manipulation of the southern entrance is required by way of artificial opening after closure during periods of significant river flows. Implementation of the Farquhar Inlet Entrance Opening Management Plan³⁵ adopted in 2010, will provide for planned openings based on agreed triggers which maintain water quality (salinity) conditions.

Second, there is potential in most regions along the MidCoast to modernize cultivation

People based industries

The MidCoast Region can grow its economy by building on its strength as an attractive location for people to reside and visit. People coming to the Region can contribute to economic growth by spending accumulated wealth, bringing established businesses and capabilities that generate income, and other income sources.

There are several people-based industries that can contribute to economic growth by increasing the flow of money into the Region (or conversely reducing the flow out of the Region). These include:

- **Tourism** — Tourists to the Region who spend on goods and services.
- **Education** — Students bring existing wealth to a region (and conversely, students leaving the Region to be educated take income out of the Region).
- **Sea/Tree changers** — Can bring wealth, an existing income stream and/or capability to generate income from outside of the Region. Local professionals can reduce the dependence on services sourced from outside the Region.
- **Retirees** — Who bring existing accumulated wealth to the Region and a Government supported income stream.
- **People with care needs** — This group includes the people with disabilities who have an income stream from the NDIS and others such as the elderly.

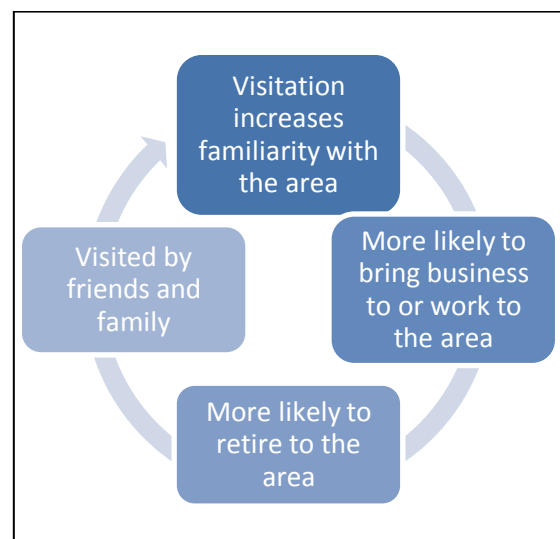
techniques improving the quality and prices received and consequently driving further expansion.

Fishing

The local Fishing industry is expected to be reasonably stable in terms of output in the foreseeable future. No significant economic opportunities for the Fishing industry have been identified. A potential growth opportunity is expansion into fish-farming, leveraging the coastal waters.

The different sectors are interrelated in two key ways. First, an improvement in local amenity (e.g. the quality/quantity of eating options) has potential to benefit each of these sectors. Secondly, the different sectors support each other. This virtuous circle is illustrated in Figure 17. People who have some link to a region are more likely to visit, set-up business and retire in a region. Through connection with others, increased movement and visitation leads to continued growth and interest in others.

Figure 17: The visitation cycle



Tourism (the visitor economy)

Tourism expenditure in the MidCoast Region has been growing at around 3 per cent per annum.

For analysis purposes, the potential growth in the market is usefully categorised by purpose of travel. The most significant potential is holiday-based tourism, which currently represents around 60 per cent of travel to the Region. The volume of 'Visiting Friends and Relatives' (VFR) tourism is largely determined by the size of the local population however, VFR tourism is greater in holiday destinations, suggesting that to some extent this market can be influenced.

There are reasons to believe that strong growth can be achieved. In particular:

- There is strong growth forecast in the nearby population centre of Newcastle;
- There is an expectation that the impact of the reduced travel times between Sydney and the Region have yet to be fully realised (in particular with the introduction of the Bulahdelah bypass);
- There is a belief that the significance of the Region has yet to be fully appreciated; and,
- The MidCoast has substantial natural assets which have not been fully leveraged.



The greatest benefit to the Region will come from growth in tourism outside of the peak travel periods. During the summer months, the coastal towns (in particular), are at capacity and there is congestion in key towns such as Forster-Tuncurry, to the detriment of the local community. Increased visitation during the off-peak periods would maximise the value retained by the Region and lead to more steady employment.³⁶ As described in the recently developed Destination Management Plan there are 'game changer'

projects that would help build the Region's profile, enhance the visitor experience, attract new markets and help address the seasonality issue.

Sea/tree changers

The MidCoast Region is an attractive destination for Sea and Tree changers — those who are seeking to exit the city in search of a better lifestyle — while staying within a reasonable distance of Sydney and the rapidly growing market of Newcastle.

Sea and Tree changers include providers of Professional and technical services (including creative industries) and light Manufacturing as well as needed skilled labour for the Region in other key enabling sectors such as health. The Professional, Scientific and Technical services sector is rapidly growing. With improved communications infrastructure, it is increasingly practical to provide these services from afar. Attracting these services to the Region is important both as a source of export income and as means of reducing imports of these services.

A key issue facing the sector is access to reliable communications.

People with disabilities

The disability service industry has changed dramatically with the NDIS which results in a large increase in funding and a shift toward greater flexibility and competition in provision of services. The Region has a number of providers servicing the community's needs.

Retiree sector

The retiree sector is an increasingly important sector for the MidCoast Region. The sector leverages the attractive lifestyle, good health facilities and proximity to key population centres. The sector can inject substantial revenue into the Region. Retirees bring personal wealth, pension income and Government expenditure (e.g. on health services). There is a net annual migration of more than 500 people aged 45+ to the Region.

There is strong potential for growth as the NSW population grows and housing pressures in major cities increases. The value of the sector can be enhanced by increasing the

influx of retirees or by attracting retirees with greater accumulated wealth. Improving the attractiveness and awareness of the Region is key to make the most of this opportunity.

Leveraging infrastructure and location

The MidCoast Region has several important economic opportunities that leverage its location and infrastructure.

The proximity to Sydney and Newcastle and connection via the Pacific Highway coupled with affordable land, make the MidCoast

region particularly attractive to light industrial and freight/logistic industries.

The opportunity will increase with the development of the Northern Gateway project which will likely make Taree a hub for freight and logistics, which would significantly reduce freight costs in and out of the Region.

Other opportunities

Other potential economic opportunities were considered based on suggestions raised by people consulted (via workshops, survey and interviews). These included:

- Community based renewable energy
- Higher education sector to attract students to the Region

- Blueberry and other horticulture production (emulating growth in the Mid-North Coast Region of NSW)

The rationale for these potential opportunities (including the link to the Region's endowments) was not sufficiently developed for inclusion in this Strategy.



5. Strategies

Three broad strategies have been identified to deliver on the vision, mitigate and manage economic risks and capture the economic opportunities for the MidCoast Region. These are:

- A. Strengthening the Region as a location of choice
- B. Creating a supportive environment for businesses to invest and grow
- C. Marketing the MidCoast Region

A. Strengthening the Region as a location of choice

The success of many of the economic opportunities discussed above depends on the MidCoast Region's attractiveness to businesses, residents and visitors. While the Region has strong existing endowments, further work and investment is required to maximise its potential. This includes improvements to core infrastructure (e.g. road and telecommunications) that are important for each of the key industry sectors and industry-specific assets (e.g. Tourism assets).

The key initiatives identified in this strategy include:

- Improve the core foundation infrastructure, in particular the roads and bridges but also other infrastructure relating to telecommunications and water
- Enhance and expand business infrastructure that will be drivers for growth, in particular the Northern Gateway project and other employment lands for commercial and light industrial
- Directly invest in key tourism assets to increase visitation, particularly in the off-season
- Encourage other lifestyle and tourist developments that will increase the Region's attractiveness to sea/tree change professionals

Potential benefits

This Strategy has direct benefits and provides a foundation for economic growth upon which other strategies can build. The potential benefits include:

- Attracting new (and growing existing) businesses to capitalise on the Region's assets;
- Increasing confidence of established businesses to invest and grow; and,
- Increasing the attractiveness of the Region to visitors and potential Sea/Tree change professionals.



Challenges and considerations

- Funds and resources are limited and it will be necessary to target investment wisely to ensure that the initiatives are consistent with the vision for the Region and have net benefits; and,
- Implementation can take significant time — it will be important to manage community and business expectations.

Infrastructure priorities

- Road infrastructure — in particular key routes for development (Bucketts Way, Thunderbolt's Way and The Lakes Way);
- Provision of adequate industrial and business lands;

- Infrastructure to support Northern Gateway development;
- Renewal of maritime facilities, particularly in Forster-Tuncurry;
- Tourism assets — in particular key destination assets (e.g. Lakes2Ocean);
- Mobile telephone infrastructure — to address coverage issues in rural areas; and,
- Water infrastructure — improving water security

Implications for stakeholders

- Many actions under this strategy will require financial investment and time and will involve coordination across multiple stakeholders;
- Some stakeholders in the community may be disappointed at the lack of direct support for some industries and projects that do not fit within the strategy; and,
- Maximising the value of the strategy will require timely and targeted marketing. (see discussion below).

B. Creating a supportive environment for businesses to invest and grow

Growing the local economy is dependent on the strength of local businesses to leverage their region's endowments. Local businesses face barriers that can be potentially reduced and removed. Actions can also be put in place to proactively support businesses to develop and grow.

A supportive environment is particularly important for professional services and light industrial businesses. As reflected in the survey, key issues facing businesses include dealing with regulation (at all levels) and accessing skilled and unskilled labour.

Key initiatives under this theme include:

- Identify and reduce/remove barriers that hinder business growth (including ensuring policies, procedures and charges are appropriate to support economic development consistent with the vision);
- Support development of the Region's workforce;
- Encourage partnerships to enable businesses to leverage each other and other groups;
- Actively support new and existing businesses with advice and other services; and,

- Provide targeted support to key sectors (e.g. tourism) including investments that will stimulate growth (see Action Plan).

Potential benefits

This strategy has direct benefits in supporting business growth, increasing business confidence and attracting new investment.

Challenges and considerations

- Council has limited resources to provide pro-active business support. Maximum leverage will be achieved through developing close ties with the business community; and,
- Many regulations affecting business are state and federal — the Region's role may include lobbying for change, helping businesses deal with state and federal issues and leveraging state/federal resources.

Infrastructure priorities

- There are no significant infrastructure priorities for this strategic theme (in addition to those in Strategy A). However, initiatives under this strategy may lead to identification of additional infrastructure priorities.

Implications for stakeholders

- Reforms to policies and charges have the potential to negatively impact some members of the community.

C. Marketing the MidCoast Region

Growing the MidCoast Regional economy depends significantly on attracting people and investment to the Region. A significant risk is that the growth potential is not achieved due to a lack of awareness and appreciation of the Region's endowments (e.g. proximity to key markets and lifestyle options) and opportunities. A focus on marketing the MidCoast Region is important to addressing this risk.

Marketing the MidCoast Region will be critical to build awareness of the Region's strengths as a location of choice for businesses and community. Similarly it will be important to ensure further developments in the Region's assets and improvements in the business environment are communicated to stakeholders in and outside of the Region.

Marketing is required to target:

- Businesses owners and professional workers who may relocate to the Region;
- Potential visitors to ensure that they are aware of the Region's attractions;
- Local residents to encourage them to 'play in their own backyard' and recommend the area to friends and relatives; and,
- The MidCoast Region labour force and community to encourage them to deliver on the vision.



Potential benefits

- Higher value-add businesses move to the Region; and,
- Greater number of visitors and spending by visitors in the Region.

Challenges and considerations

- A current inhibitor is the lack of a clear branding for the MidCoast Region. This needs to be resolved before other marketing efforts can begin;
- Marketing needs to be consistent with the community's vision for the Region and carefully constructed and targeted; and,
- Marketing must be based on the Region's assets and capabilities. It is important that the other strategies are undertaken to ensure the Region lives up to the promise. Consequently marketing needs to also be carefully timed with the developments (e.g. in tourism assets) being undertaken.



Infrastructure priorities

- There are no hard infrastructure priorities under this strategic theme, however investment will be required in marketing assets.

Implications for stakeholders

- The Marketing Strategy has direct implications for the local community to deliver on the vision; and,
- Effective marketing on the back of other strategies will stimulate further population growth (e.g. retirees to the Region) which may disappoint some in the community.

6. Regional Action Plan

A set of initiatives and actions to deliver on the Strategy over the next 4 years are presented in the table below organised against each of the three strategies. The action plan is a working document and it is expected that it will be revised during the period of the plan.

The table also summarises:

- the potential impact of each action. Actions are rated using a scale of Very High through to Low based on considerations such as economic impact, funding opportunities, risk factors and mitigation opportunities as well as delivery timeframes. Actions recorded as high or very high are highlighted.
- the timeframe for when the action will occur. The columns 1 to 4 indicate the years 2018/19 through to 2021/22. There is a weighting of actions towards the initial years, reflecting that some actions will result in subsequent actions and there will likely be additional actions identified during the course of the plan
- the responsibility for undertaking the action and any additional funding needs. Those actions which will likely result in needs for additional funding are highlighted. No comment is made for actions that do not require additional funding.

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
A	Location of choice							
A.1	Improving core infrastructure							
A.1.a	Continue road upgrades, prioritising roads that are important for growth, including Thunderbolts Way and Bucketts Way.	Poor state of transport infrastructure has been a key issue for businesses	High	X	X	X	X	Council & RMS Additional funding to be sought for some projects

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
A.1.b	Invest in Nabiac water security project	Provide stronger future water security for the MidCoast region	High	X				Council
A.1.c	Investigate additional incentives to address mobile black spots	Poor mobile coverage impacting on lifestyle and attractiveness of region for business	Medium	X	X			Telco, Council & business community. Additional funding likely required
A.1.d	Augmentation of Gloucester water supply scheme	Improve water security and facilitate growth	High		X	X		Council
A.1.e	Renewal of Gloucester sewage treatment plant	Existing plant near end of its useful life	Low		X	X		Council Additional funding to be sought under Safe & Secure Water program.
A.1.f	Improvements to the sewerage systems at Tea Gardens and Pacific Palms	Reduce the impacts of significant wet weather events on the existing sewerage infrastructure	Low	X	X			Council Additional funding to be sought under Safe & Secure Water program for the Pacific Palms project.
A.1.g	Investigate power upgrade at Whitbread Street Industrial area	Transport of manufactured goods restricted by current location of services	High	X				Business community & provider
A.1.h	Investigate power infrastructure upgrade at	Current infrastructure limits the supply capacity to the area impeding the growth and	High	X				Business community

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
	Gloucester light industrial area	operating efficiency of current businesses.						& provider
A.2	Enhance and expand business infrastructure							
A.2.a	Develop employment land strategy	Ensure future supply of suitable employment lands	Low					Council
A.2.b	Provide supporting infrastructure for Northern Gateway project	Infrastructure required for Princes Street and Emerton Close roundabout	Very High		X	X		Council & RMS
A.2.c	Progress the Manning Heath-Taree CBD Development Precinct Plan	Revitalise and redevelop the area to foster business development and growth. Provide opportunity to increase service provision to the Region.	Medium		X	X		Council
A.3	Invest in tourism assets							
A.3.a	Implement Destination Management Plan (DMP) including game changer projects such as - <ul style="list-style-type: none"> • Great Lakes Great Walk & Aquatic Trails Project • Manning Valley Soil To Sea Produce Precinct • Gloucester Visitor Hub • Outdoor & Nature-based Recreation Initiatives • Celebrating Culture on Country • Centre of Excellence for the Environment & Wetlands • Forster Tuncurry Revitalisation 	Build key destination assets and experiences to grow visitor economy. Maintain and grow existing markets to encourage repeat visitation and increased length of stay. Attract new markets to increase visitor numbers and yield. Address seasonality, lack of regional dispersal and capture opportunities to link with other sectors. (Refer to DMP for further information)	High	X	X	X		Council, NPWS, Forestry, Crown Lands, LALC and others Funding required for game changer projects

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
A.3.b	Develop a strategy for biking themed assets across the Region	Create adventure based activity to increase off-peak visitation and improve lifestyle. (Refer DMP 'Outdoor and Nature-Based Recreation' for actions.)	High	X				Council with local groups Funding to be sought for implementation
A.3.c	Complete Forster Main Beach Strategy	Including investment in maintaining and enhancing existing facilities, trails and connectivity.	Low-medium	X	X			Council
A.3.d	Seek funding and support to undertake a study into impacts of RV and other free camping activities	To develop a strategy to manage and leverage the impacts of free camping in the Region	Medium	X	X			Funding to be sought for implementation
A.3.e	Investigate and support indigenous based tourism potential	Refer to DMP	High	X	X			Council & LALC
A.3.f	Further develop State Forest tourist potential	Refer to DMP	High	X	X			Council and Forestry Corp
A.3.g	Further develop National Park tourist potential	Refer to DMP	Medium		X	X		Council and NPWS
A.4	Invest/encourage lifestyle developments							
A.4.a	Grow and support development of sporting infrastructure for activities that are compatible with the area	Build key sporting destination assets and opportunities to grow visitor economy. Refer also DMP.	High	X	X	X	X	Council
A.4.b	Support vibrant town centres	Create a positive retail experience to	Medium		X	X		Council & business

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
		encourage local shopping and increased visitor numbers						community
A.4.c	Develop and implement a MidCoast Cultural Plan	Leverage the area’s visual and performing arts and cultural strengths and assets including opportunities for the Manning Regional Art Gallery and Manning Entertainment Centre, to support the development of the Region as a location of choice.	Medium	X	X	X		Council
A.4.d	Continue to support and identify events for the MidCoast which maximise community and economic benefits for the Region.	To capitalise on the economic value of major events. Refer also DMP.	Medium	X	X	X	X	Council and community
A.4.e	Development of a Housing Diversity and Affordability Strategy	Identify housing needs and opportunities in the Region to underpin new LEP	Medium	X	X			Council
A.4.f	Support the implementation of the Mid Coast Disability Inclusion Action Plan (DIAP)	Considerations to include fostering positive community attitudes and behaviours, creating liveable communities, supporting access to meaningful employment and improving access to services through better systems and processes	Medium	X	X	X		All
B	Supportive environment for business to invest and grow							

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
B.1	Remove barriers (regulatory & other) to growth							
B.1.a	Complete Rural Opportunities and Land Use Strategy	Create additional opportunity for rural land use	High	X				Council
B.1.b	Development of a single LEP and DCP for the Region	Increase development opportunity and consistency across the area	High	X	X	X		Council
B.1.c	Review charges and payment options (water and other) for development to ensure they are cost reflective and do not unnecessarily discourage growth	Development charges for water and sewerage are a key concern for new and expanding businesses	High	X				Council
B.1.d	Investigate issues with the roll out and access to the NBN in the Region	Improved digital functionality in the Region will foster business efficiency and growth	Medium-High	X	X			Council, business community & NBN Co, other industry
B.1.e	Establish a digital economy forum	Capitalise on digital opportunities such as fibre to the node to foster the digital economy as a key enabler of economic growth for the Region	Medium-High	X	X			Council, business community & NBN Co, other industry
B.2	Support development of the Region's workforce							
B.2.a	Encourage increased workforce participation through the establishment of industry specific initiatives such as a 'Jobs Club'	Difficulty attracting and retaining suitable workforce particularly in younger age groups. Opportunity exists to re-engage segments of the community currently not engaged in	Low	X	X			Council, employment and training providers, business community

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
		employment.						
B.2.b	Establish collaborative approach to industry specific workforce development strategies including a focus on vocational training and education.	Difficulty attracting and retaining suitable workforce particularly in younger age groups. Opportunity exists to re-engage segments of the community currently not engaged in employment and to improve economic contribution through higher skill levels. Previous examples exist in MidCoast industries and communities.	Medium		X			Council, training providers and business community
B.2.c	Develop strategies to strengthen higher education participation	Linking young people with education opportunities and addressing current and future market needs.	Medium		X			
B.2.d	Explore opportunities to deliver education and training in the local area that link to delivering on our vision and our industry strengths	Focus areas could include aged care, hospitality, agriculture, aquaculture and environmental management	Medium		X	X		Council, industry and training providers
B.3	Provide active support for business development							
B.3.a	Establish and implement a Gloucester Job Fund (replicating the AGL legacy fund)	Opportunity to grow the local job market through supporting business expansion and growth.	Very High		X	X		Gov't, Council and business community
B.3.b	Establish and implement a Manning Job Fund	Opportunity to grow the local job market through supporting business expansion and growth.	Very High		X	X	X	Gov't, Council and business community

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
B.3.c	Establish a program with key stakeholders to build business capacity & capability	Improve business resilience, people management, , succession planning, encourage innovation, entrepreneurship and connectivity. Encourage knowledge transfer and consider business mentoring programs. Improved customer service and other business management skills important to vision	Low-Medium			X	X	Council and business community
B.4	Encourage partnerships							
B.4.a	Establish an economic development reference group between business community and council	Provide a foundation for managing business environment in a collaborative manner and foster positive outcomes	High	X				Business community with Council
B.4.b	Establish strategic linkages and partnerships with external organisations to support economic growth of the Region	Important to establish strong partnerships with key agencies and organisers who may influence economic growth of the area.	Medium		X			Business community with Council
B.4.c	Encourage the establishment of strategic business networks	Support local businesses to work collaboratively, capitalising on the collective strengths of the Region.	Medium	X	X	X	X	Business community
B.4.d	Investigate establishing (e.g. a partnership) for a MidCoast services hub in Sydney	Improve MidCoast's presence in Sydney. Must be part of targeted strategy.	Low-			X	X	Business community with Council
B.5	Provide targeted support to key sectors							

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
B.5.a	Undertake a review of Council managed sale-yard services	Ensure the facilities are managed in a way which is equitable for users, and which maximises community benefit without placing undue demand on Council resources or finances.	Low	X	X			Council, Dept Primary Industries - Agriculture, EPA, Local Land Services
B.5.b	Promote and grow sustainable land use management through education and support	Continue to partner with and support local, state and federal funding bodies to ensure sustainable agribusiness practices are applied across the Region	Medium	X	X	X	X	Council, education providers, NSW Govt Fed Govt Community, Dept Primary Industries - Agriculture
B.5.c	Develop plans for future management of mining in the Region	Develop strategies to manage possible future changes to mining in the Region	Low	X	X	X	X	Mine operators, Council, NSW Mineral Council or Trade & Investment, local business and community groups
B.5.d	First Steps Community Centre	Social Support and community connectedness through co locating a number of existing community, medical and social services while also providing physical space for visiting service providers, community groups, schools, council and government	High	X				Community and Council, Dept Health, Dept Family & Community Services

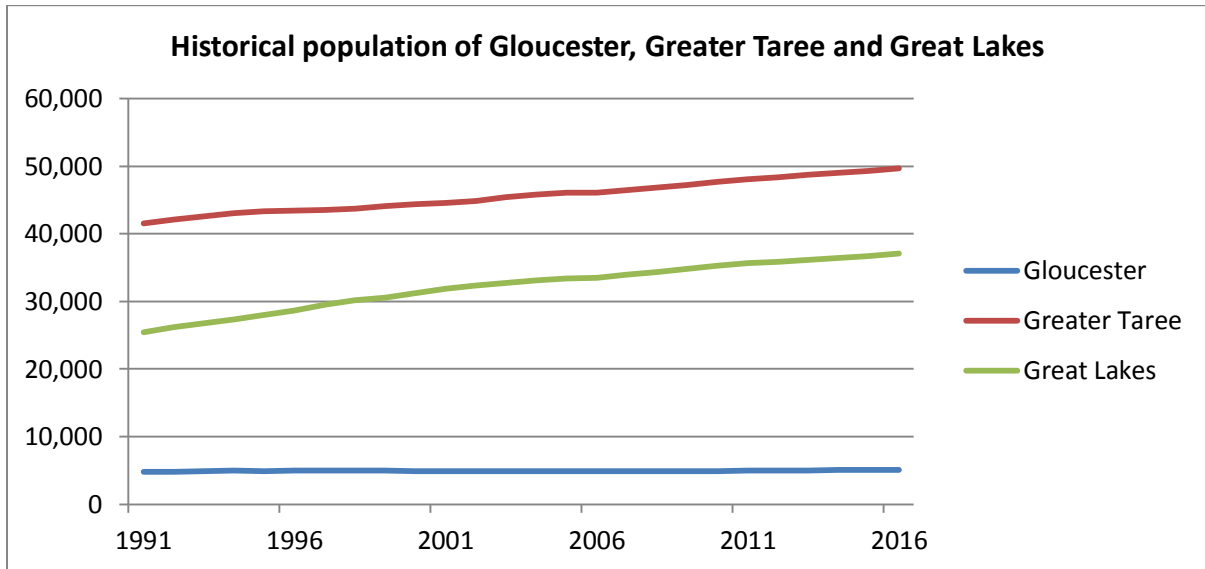
Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
		agencies.						
B.5.e	Encourage further investment into the local aquaculture industry	Undertake feasibility assessments into aquaculture based on local strengths and market demand	Medium	X	X			Council, Dept Primary Industries - Fisheries and industry
C	Marketing the Region							
C.1	Establish a coordinated marketing strategy							
C.1.a	Develop a coordinated marketing strategy that focusses on the strengths of the area as identified in this strategy.	Investigate opportunities to develop, link or leverage off specific marketing campaigns, remembering that the marketing must be targeted to the specific market and market segment.	High	X	X			Council / business community
C.2	Marketing to business owners and professionals							
C.2.a	Undertake targeted marketing around key business assets and opportunities	For example, marketing business opportunities associated with airport facilities and Northern Gateway Development	High		X	X	X	Council / business community
C.3	Marketing to the community							
C.3.a	Actively promote the Region's vision to the community	Delivery of vision needs support of business community and workforce	Medium	X	X	X	X	Gov't Council / business community

Ref#	Initiative / action	Issue/Opportunity	Impact/ Importance	Timeframe				Responsibility/ Funding needs
				18/19	19/20	20/21	21/22	
C.3.b	Promote and encourage employment opportunities in aged-care and service sector	Address perceived issues with these industries (casualisation, lack of career progression)	Low-Medium		X	X		Service & training providers
C.3.c	Investigate links to MidCoast destination marketing initiatives such as 'Discover Your Own Backyard' style campaign	Raise local awareness of business success stories and encourage residents and local businesses to identify opportunities to grow the local economy	Low-Medium		X	X		Council
C.3.d	Actively promote Council owned lots within land developments to facilitate land sales	Space activation and income opportunities	Low	X	X	X	X	Council
C.4	Marketing to visitors							
C.4.a	Investigate promoting the opportunities for employment and relocation to visitors	Capitalising on visitors to region. Need to ensure marketing of the Region is consistent and explore opportunities for linkages between the targeted campaigns.	Medium		X	X		Council's Economic Development and Destination Management Staff.
C.4.b	Implement marketing strategy as detailed in DMP	DMP is designed to maintain existing markets but also target new high-value markets resulting in benefits including increased visitations during non-peak periods and increased yield.	High	X	X	X		Council and tourism industry

Appendix 1: Additional regional profile data

Demographic data

Figure 18: Historical population growth

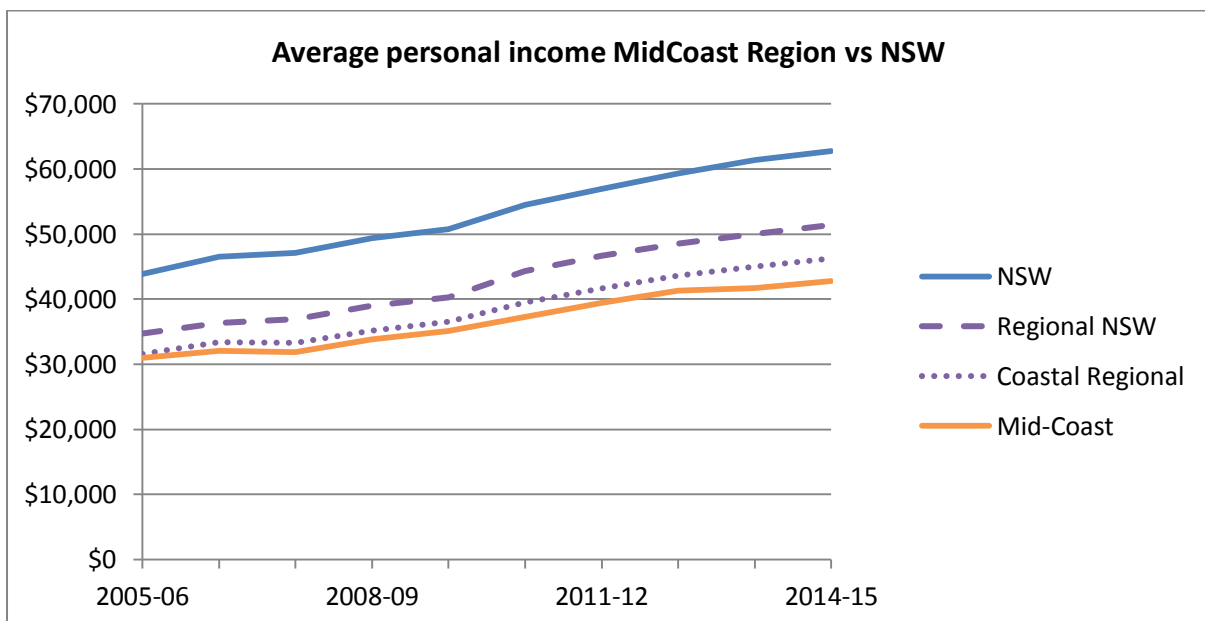


Source: ABS, Estimated Resident Population

1. The average annual growth rates since 1991 for Gloucester, Greater Taree and Great Lakes are 0.2%, 0.7% and 1.5% respectively.

Unemployment and income

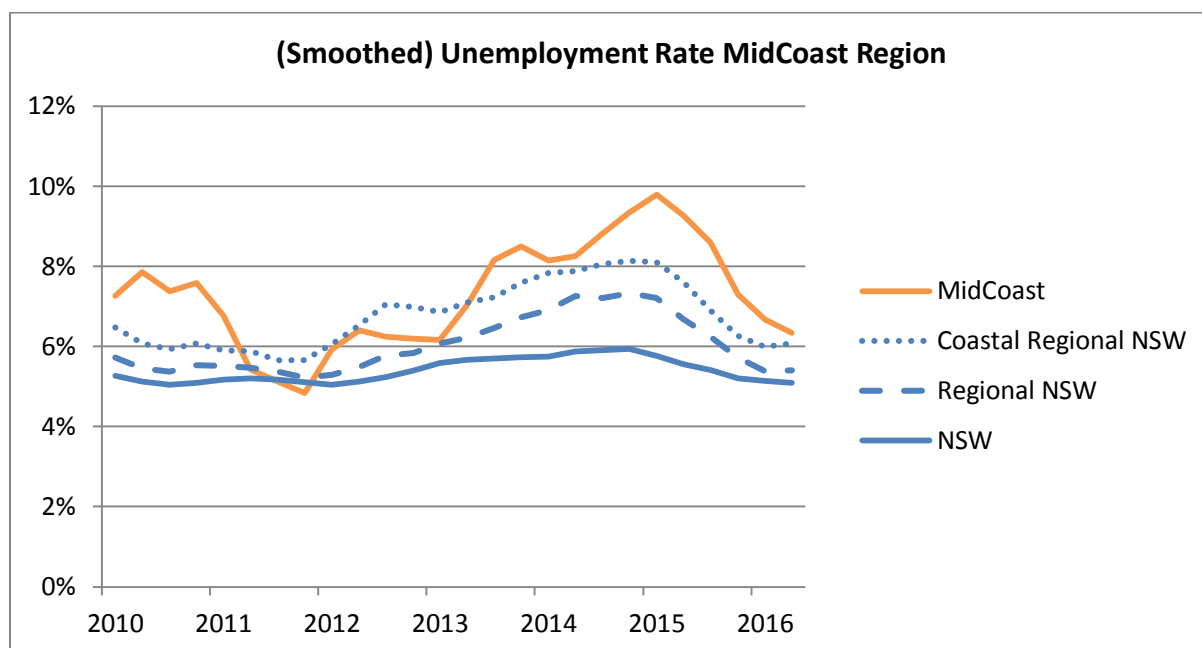
Figure 19: Personal income over time



Source: ABS, Estimates of Personal Income for Small Areas

1. Personal income includes employee income (i.e. wage and salary) and other personal income (e.g. investment income).

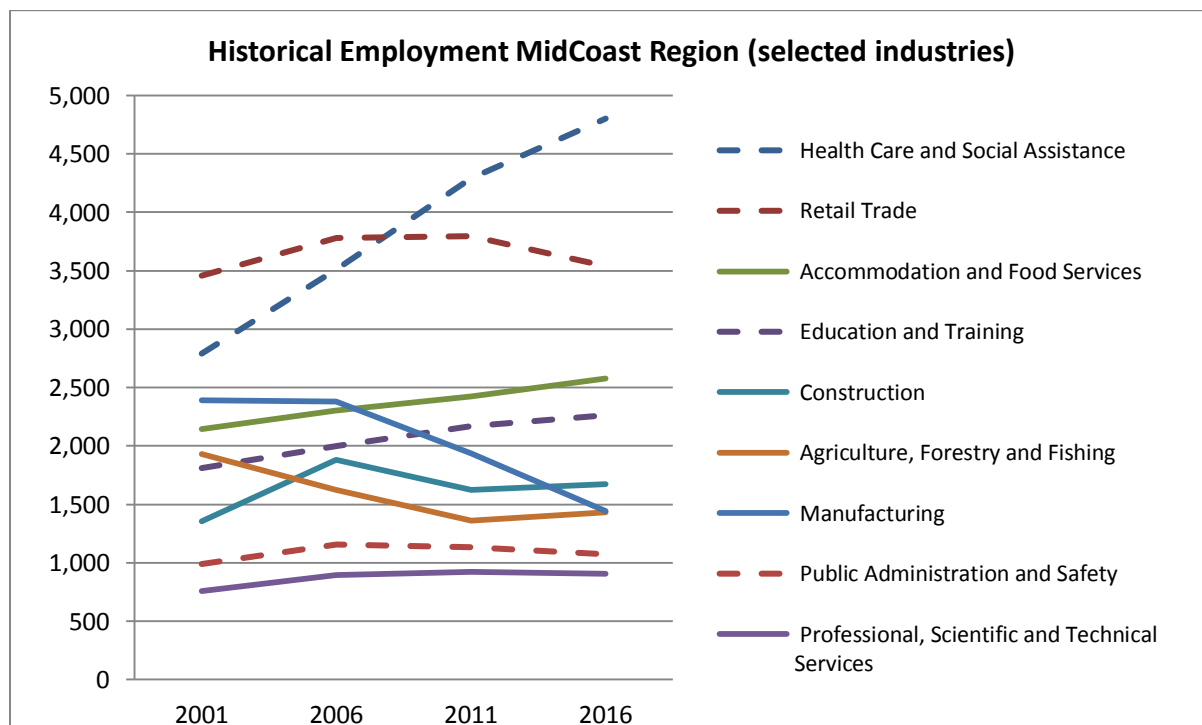
Figure 20: Unemployment over time



Source: Department of Employment, LGA Data tables — Small Area Labour Markets — March quarter 2017

Industry analysis

Figure 21: Historical Employment by Industry



Source: ABS, 2016 Census of Population and Housing.

Note: 1. Industries are classified according to standard ABS industry classifications. 2. Only selected industries are shown in the figure. 3. Dotted lines are population serving industries.

Table 7: Employment forecasts by industry – forecast growth from 2017 to 2022

ANZIC Industry sector	Mid North Coast	NSW (excluding Sydney)	Australia
Agriculture, Forestry and Fishing	1.4%	-4.9%	-0.8%
Mining	-6.6%	-1.1%	2.4%
Manufacturing	-9.1%	-8.3%	-4.2%
Li Electricity, Gas, Water and Waste Services	-12.8%	-9.8%	-7.0%
Construction	12.0%	10.5%	10.9%
Wholesale Trade	5.5%	1.5%	0.5%
Retail Trade	3.2%	1.7%	3.7%
Accommodation and Food Services	10.9%	6.5%	11.2%
Transport, Postal and Warehousing	-4.8%	-2.0%	6.5%
Information Media and Telecommunications	10.9%	10.8%	3.3%
Financial and Insurance Services	1.0%	2.4%	5.6%
Rental, Hiring and Real Estate Services	-4.7%	2.9%	8.5%
Professional, Scientific and Technical Services	22.8%	8.1%	12.5%
Administrative and Support Services	24.3%	4.5%	8.4%
Public Administration and Safety	18.3%	11.1%	9.3%
Education and Training	15.7%	12.5%	12.0%
Health Care and Social Assistance	21.1%	18.8%	16.1%
Arts and Recreation Services	14.3%	14.9%	9.9%
Other Services	0.6%	1.6%	2.5%
Total (industry)	11.0%	6.3%	7.8%

Source: Department of Employment 2017 Employment Projections

Should there be a black line in the table dividing the NSW and Australia columns?

Appendix 2: Institutions

Table 8: Key institutions

Institution	Role in economic future of the Region	Capacity/capability/linkages/notes
Government bodies		
MidCoast Council	Set and implement local regulations. Provide support for local businesses. Directly invest in key infrastructure and provide key services	Three Full Time Equivalent employees for economic development. Good linkages with all key stakeholders
Hunter Councils (Hunter Incorporated joint organisation)	Aim is “uniting of councils on general matters and in their approach to the State and Federal Governments for positive action and assistance”	An association of councils in the Hunter region including MidCoast Council. ³⁷
NSW Office of Regional Development (ORD)	Provide advice and assistance to Council, businesses and other stakeholders on a range of matters including grant applications and facilitating linkages	Works with Council and other Govt and non-Govt organisations including private businesses
Regional Development Australia (RDA) Mid North Coast and Hunter ³⁸	Facilitates regional development; undertakes research; provides advice and assistance to businesses including access to Australian Government Grants and the skilled migration schemes.	Part of a national network of RDA committees. Work closely with ORD and Councils.
NSW Department of Planning	Develop land-use policy and plans. Assess significant development	Strong linkages with Council
Hunter Development Corporation (HDC)	The HDC is charged with promoting, securing and managing orderly economic development in the Hunter region (which incorporates the MidCoast). In late 2016 it’s role was expanded to include overseeing delivery of the Hunter Regional Plan 2036.	The HDC is well resourced but its focus has historically been on the Lower and Upper Hunter areas.
Training Services NSW	Responsible for government-funded vocational education and training (VET) in NSW.	Regional office in Newcastle Close linkages VET providers (TAFE)
NSW Department of Primary Industries (DPI)	Works to increase the value of primary industries. Key role in undertaking agriculture productivity research.	Maintains close linkages with other research groups, Govt departments and industry organisations. Due to the cessation of extension services, has limited engagement with agricultural producers.
Local Land Services	Provides agricultural production advice and training; responsible for biosecurity, natural resource management and emergency management	NSW Govt agency with strong links with local agricultural producers. Strong linkages to Natural Systems division of Council.

Institution	Role in economic future of the Region	Capacity/capability/linkages/notes
AusIndustry	Facilitate access to Commonwealth Government programmes	Limited local capacity
Industry related bodies		
Business chambers and other business groups ³⁹	Support local businesses to grow. Can help promote the Region's economic vision. Key stakeholders in providing feedback to Council	Capacity varies Strong linkages to Council
Industry associations and bodies ⁴⁰	Represent and support local sector	Strong linkages with state and Federal Govt agencies
The Business Centre	Provides Govt subsidised small business advisory programs in the Region	Works closely with small businesses in the Region
Employment service providers ⁴¹	Support local businesses and job seekers	Works closely with small businesses in the Region
Other		
TAFE NSW & registered training organisations	Provides training and education services to local workforce	TAFE facilities in Tuncurry and Taree
Community organisations ⁴²	Improve amenity and lifestyle. Help to promote region	Limited financial capacity but have strong membership
Local Land Councils ⁴³	Key stakeholder with regards to land use	
Forestry Corporation of NSW	Stewardship of state forests	Works with councils and Govt Departments
National Parks and Wildlife services	Protection and enhancement of key natural assets	Works with councils and Govt Departments. Some joint projects with Forestry Corp.

Appendix 3: Survey results

Overview

An online survey was conducted in October 2017. 117 responses were received from a mix of businesses and other stakeholders. The web-link to the survey was advertised on the Council’s website and sent directly to key businesses and business chambers to circulate. The survey covered 21 questions relating to:

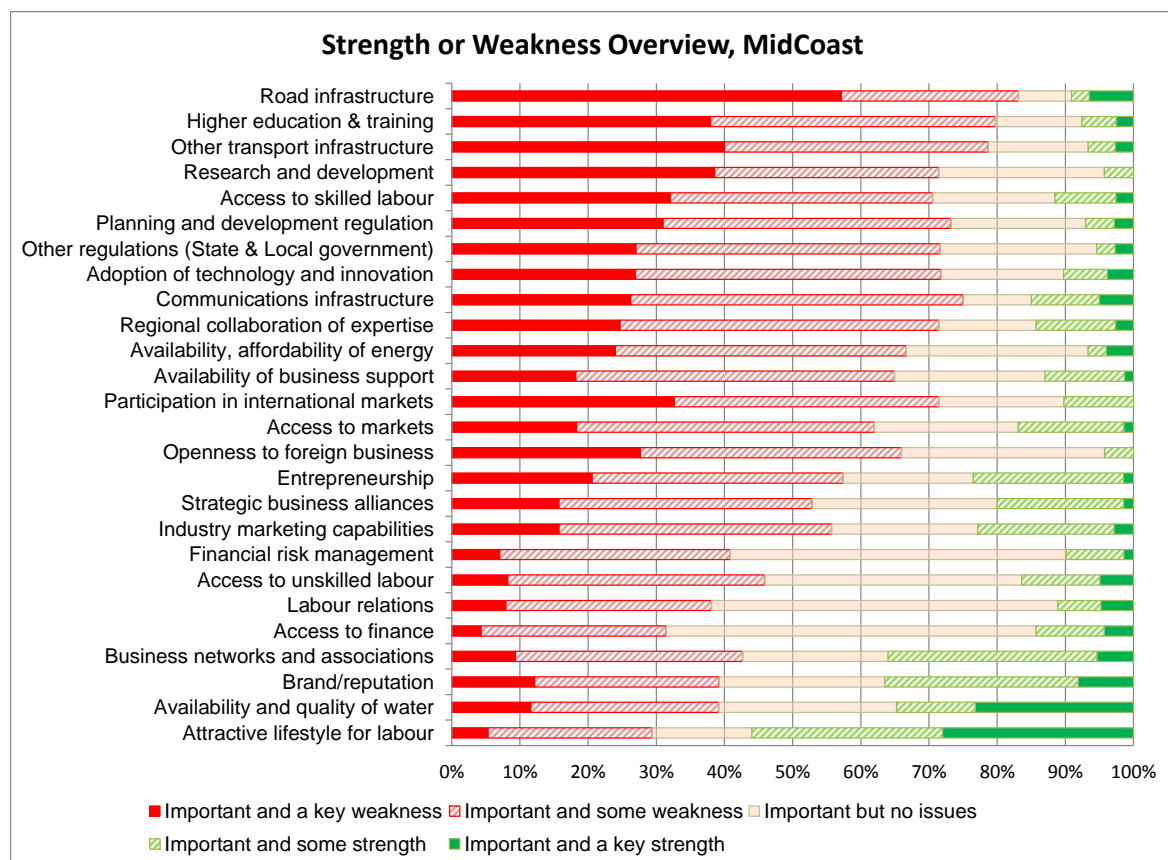
- Background of the respondent.
- Matters relating to their chosen industry including economic outlook, strengths, weaknesses, risks, issues and opportunities.
- Issues and opportunities for the Region.

A similar survey had been conducted by the consultants in other regions including the Hunter and regions within New England and North West.

Strengths and weaknesses

A summary of the respondent’s ratings of strengths and weaknesses is presented in the figure below. Consistent with surveys conducted elsewhere it was more common for respondents to rate factors as a relative weakness.

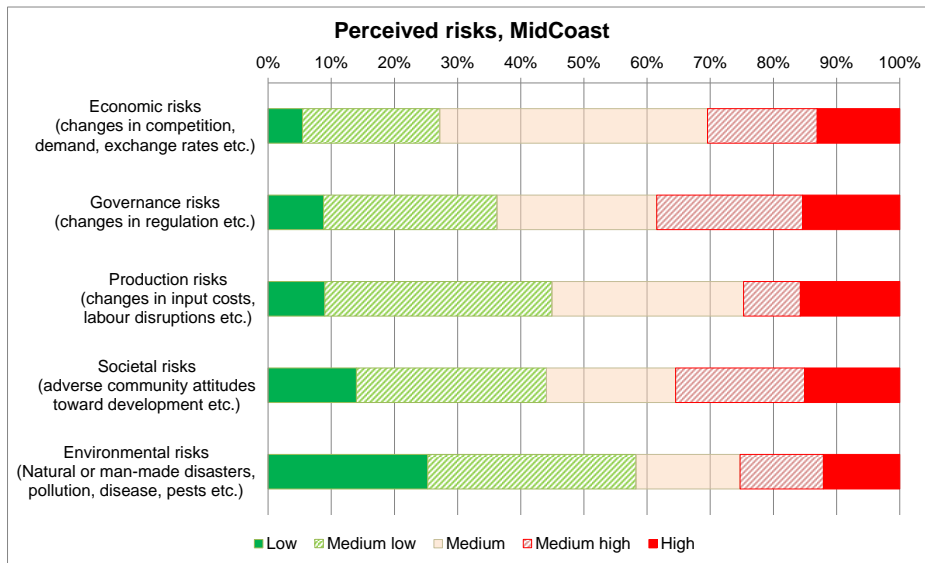
Figure 22: Strengths and weaknesses



Source: Survey conducted for the Strategy

Risks

Figure 23: Perceived risks as captured in survey



Source: Survey conducted for the Strategy

Endnote

- ¹ Functional Economic Regions for most other regions in NSW encompass multiple LGAs. LGA boundaries define regions for administrative purposes, which often are an artefact of history and bear little resemblance to the economic activity that takes place. A Functional Economic Region is a concept developed to more accurately reflect the boundaries of regional economies and economic interaction. These boundaries have been developed by considering Australian Bureau of Statistics data such as residents' journeys to work and the jobs-housing ratio for the region.
- ² Following the amalgamation, the local Water Authority MidCoast Water, was dissolved and integrated into Council on 1 July 2017.
- ³ The methodology has been derived from that outlined by Stimson, Stough and Roberts, Regional Economic Development - Analysis and Planning Strategy, Springer.
- ⁴ Based on the Australian Bureau of Statistics (ABS) Estimated Resident Population (ERP). The ERP is 'based on Census counts of usual residents that are adjusted to account for usual residents missed in the Census, including residents estimated to have been temporarily overseas on Census night.' The ABS considers it the most accurate measure of population. See <http://www.abs.gov.au/websitedbs/d3310114.nsf/Home/Understanding+different+population+counts>.
- ⁵ There are many other documents that were examined as part of the review but are not listed in the table.
- ⁶ The actions in the Hunter Regional Plan to growth the economy of the MidCoast and Port Stephens are:
 - Enhance tourism infrastructure and connectivity.
 - Enhance links to regional services in Greater Newcastle.
 - Enable economic diversity and new tourism opportunities that focus on reducing the impacts of the seasonal nature of tourism and its effect on local economies.
 - Promote growth of industries that can leverage accessibility provided by the Pacific Highway.
 - Plan for and provide infrastructure and facilities that support the ageing population.
- ⁷ Source: ABS ERP 2016.
- ⁸ Source: ABS 2016 Census of Population and Housing .
- ⁹ SEIFA (Socio-Economic Indexes for Areas) provide summary measures derived from the Census and can help users understand the relative level of social and economic wellbeing of a region. Data shown is based on Census 2011. The SEIFA indices based on Census 2016 will become available in 2018.
- ¹⁰ Source: ABS 2016 Census of Population and Housing .
- ¹¹ Centre for Economic and Regional Development, Regional Economic Growth, Enablers April 2017.
- ¹² A specialisation might be best measured by some measure of output (e.g. low cost of production, or highly quality of output). Employment is a more convenient and straightforward measure to apply.
- ¹³ The industries portrayed are the top-level categorisation used by the Australian Bureau of Statistics.
- ¹⁴ Data in this section is based on 2016 Census unless otherwise specified.
- ¹⁵ In addition to direct employment, an additional 67 people are reported as being employed in 'wood product manufacturing'.
- ¹⁶ Source: NSW Department of Primary Industries (2017) Aquaculture Production Report 2015-2016.
- ¹⁷ Consent for another project called the Rocky Hill Project near Gloucester was recently refused by the NSW Planning Assessment Commission.
- ¹⁸ As a national highway, maintenance and upgrades to the highway are funded by the State and Federal Government.
- ¹⁹ In total there are 346km of regional roads, 3228km of local roads (Unsealed - 1790km, Sealed – 1438km) and 542 bridges (Concrete – 347, Timber – 195).
- ²⁰ A negligible number of people use the train service as means of travelling to work. Train Statistics 2014 published by Transport for NSW reports 19 trips taken by rail for the Taree – Gloucester area.
- ²¹ The region is also home to a number of other private airports.
- ²² Source: Airport Traffic Data 1985–86 to 2016–17, available at <https://bitre.gov.au>
- ²³ Williamtown airport is less than 100 minutes from most locations in the MidCoast region.
- ²⁴ Airport Traffic Data 1985–86 to 2016–17, available at <https://bitre.gov.au>.

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- 25 Issues, considerations and opportunities are listed in the Tuncurry Site Presentation, available at <http://yourportcrownland.engagemthq.com/Tuncurry>
- 26 See <http://yourportcrownland.engagemthq.com/Tuncurry>
- 27 http://www.crownland.nsw.gov.au/crown_land/coastal-harbours-and-river-entrances/tea-gardens
- 28 <http://yourportcrownland.engagemthq.com/Tea-Gardens>
- 29 Transmission Annual Planning Report 2017.
- 30 Or Taree to Grafton where there will be a similar facility.
- 31 There will also be community benefits. It will allow larger freight to be broken down to smaller modes of transport that can then move around the local road network and reduce the need for large trucks to drive through local streets.
- 32 NSW Office of Environment and Heritage, North Coast Climate change snapshot, 2014.
- 33 See NSW Office of Environment and Heritage, (2014), North Coast Climate Change Snapshot, Sydney.
- 34 See NSW Forestry Industry Roadmap available at <http://www.crownland.nsw.gov.au/forestry/industry-roadmap>
- 35 Farquhar Inlet, Old Bar - Entrance Opening Management Plan (Worley Parsons 2010).
- 36 Increased visitation during peak times would lead to additional construction costs associated with holiday accommodation, a significant portion of which would be spent outside of the region.
- 37 The member councils of the Hunter Incorporated joint organisation are Cessnock City, Dungog Shire, Lake Macquarie City, Maitland City, Muswellbrook Shire, Newcastle City, Port Stephens, Singleton and Upper Hunter Shire.
- 38 RDA Hunter (www.rdamnc.org.au) covers the former Greater Taree LGA and the coastal LGAs north to Coffs Harbour. RDA Mid North Coast rdahunter.org.au covers the former Gloucester and Great Lakes LGAs along with the LGAs of Cessnock City, Dungog Shire, Lake Macquarie City, Maitland City, Muswellbrook Shire, Newcastle City, Port Stephens, Singleton and Upper Hunter Shire.
- 39 Other business groups include: Great Lakes Women in Business, Gloucester Economic Development Group, and the Manning Valley Businessman's Association. The Rural Financial Counselling Service (RFCS) also provides support to rural businesses.
- 40 Other industry associations include: Meat Livestock Australia, NSW Farmers Federation, The Wallis Lakes Fisherman's Coop.
- 41 Employment service providers include: NORTEC, breakthru, Workplace Services, Castle Personnel Services, Tursa Employment & Training, Nova Employment & Training, Jobfind Centre, ETC - Enterprise & Training, Wesley Uniting Employment, Wesley Mission, OCTEC Employment Service, Complete Staff Solutions and Buckettsway Neighbourhood group inc.
- 42 Community organisations include: Clubs - Rotary Lions, Quota, Coolongolook/Wotton Action group, North Arm Cove Residents Association, Hallidays Point Progress Association, Forster Keys Ratepayers & progress Association, Wards River Progress Association, Tea Gardens / Hawks Nest Progress Association, Friends of the Manning Regional Art Gallery, Great Lakes Art Society, Friends of the Great Lakes Library, Advance Gloucester, Myall River Action Group, GACCI (Gloucester), Destination Gloucester, Wallis & Smiths Lake Coast & Estuary Committee, NSW Fishing Clubs Association, Arts Mid North Coast, RSL Clubs, SLSC.
- 43 Local Land Councils in the region are: Forster Land Council, Karuah Land Council and Purfleet/Taree Land Council.

