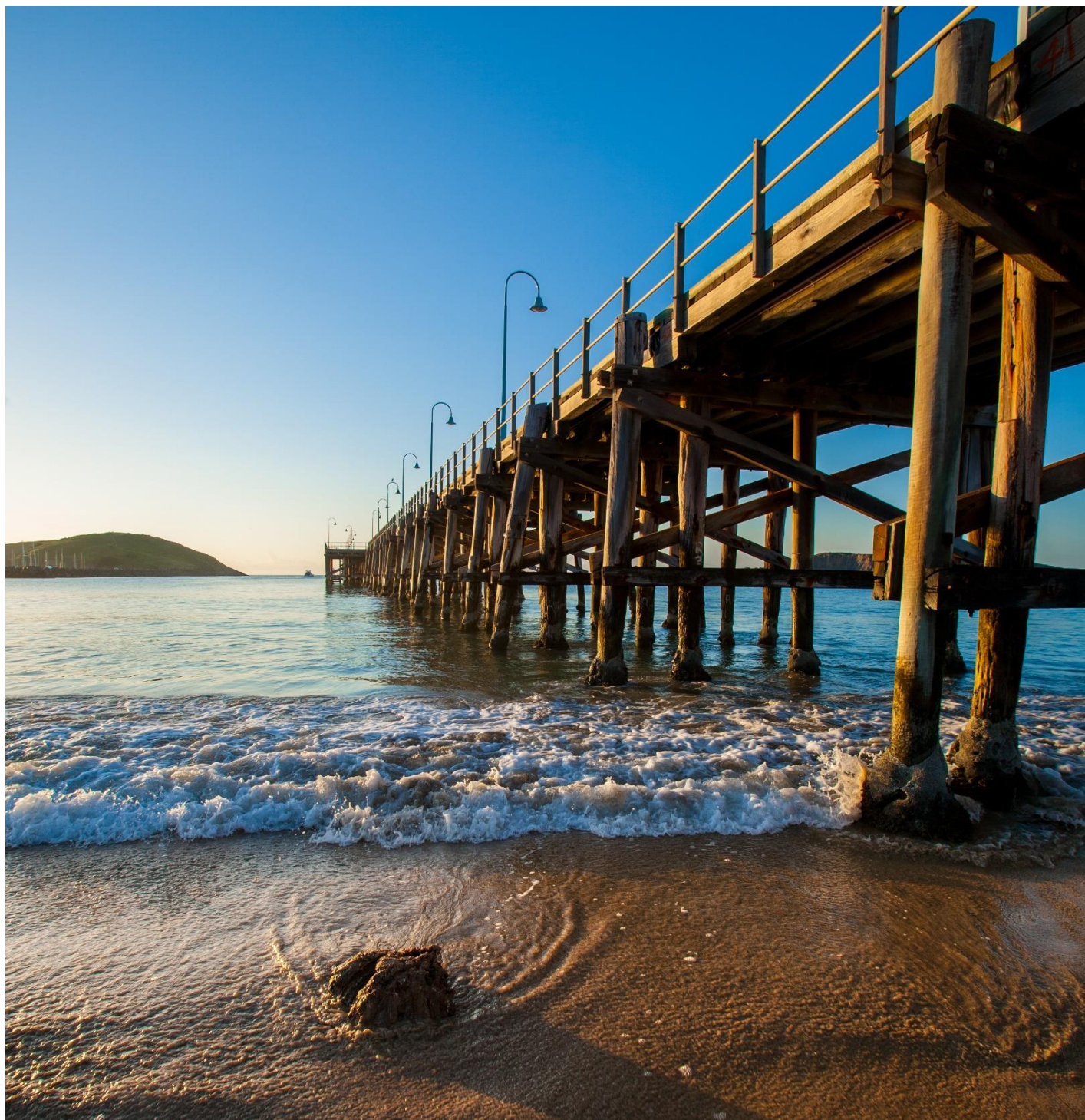
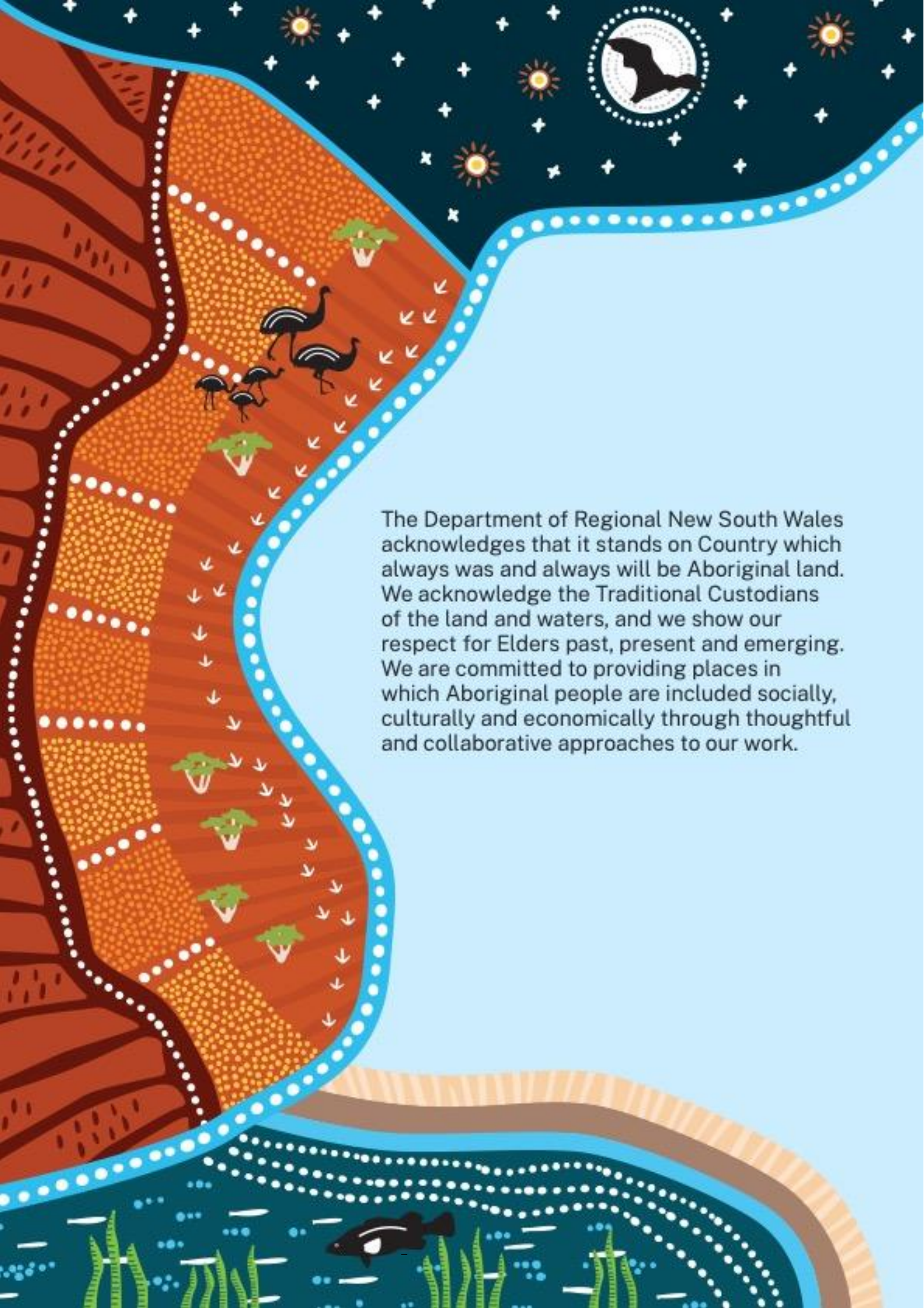


## Coffs Coast Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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### **On Country – Artwork by Mumbulla Creative**

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a river redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: Coffs Harbour Jetty. Photo credit: Coffs Harbour City Council

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# 1. Executive summary

## Changes in the Coffs Coast region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

### The Coffs Coast region has seen significant investment in major projects since 2018



The **\$194 million** Coffs Harbour Health Campus expansion.



The **Coffs Harbour Bypass** project at a cost of **\$2.2 billion**.



**\$56 million** committed to deliver the **Dorrigo Escarpment Great Walk**.



**\$43 million** to deliver the **Wiigulga Sports Complex** and **Coffs Harbour Regional Sports Hub Stage 2** projects.

### The region has seen population and house price growth, alongside reducing housing vacancy rates and a significant increase in job vacancies



**+ 2.4%** population growth since 2018.



The proportion of the population over 55 years old has **increased by 0.7 percentage points** since 2018.



Housing **vacancy rates** sit **below 2%**, with median **house prices** rising more than **50%** since 2018.



**Unemployment** has **declined more than 4%** since 2018, with **job vacancies** reaching an all-time high of **4,595** in 2021 .

The region's key industries continue to remain resilient, with agriculture and tourism continuing to be key drivers of economic growth



Tourism

+ 2.3% year-on-year (YoY) growth from 2011-2020

\$ 649 million visitor spend in 2021

8,133 jobs supported in 2021



Construction

+ 4.4% YoY growth from 2011-2020

\$ 512 million gross value added (GVA) in 2020

3,896 jobs supported in 2021



Healthcare and social assistance

+ 5.3% YoY growth from 2011-2020

\$ 588 million GVA in 2020

7,495 jobs supported in 2021



Agriculture, forestry and fishing

+ 8.8% YoY growth from 2011-2020

\$ 345 million GVA in 2020

2,213 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Coffs Coast have highlighted skills development, maximising benefits from major project investment, and enhancing resilience as being key priorities for the region.

Matching the local training offering with industry need



Stakeholders saw the development of an underutilised workforce as a key regional priority.

Maximise local benefits from major projects



Maximising long-term benefits from major project investment, including placemaking opportunities arising from the Coffs Harbour Bypass was highlighted as a key priority for stakeholders.

Building resilience



Recent shocks have brought the need to focus on infrastructure resilience to the forefront of the regional agenda.

## Coffs Coast REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Grow the year-round visitor economy by further diversifying and promoting offerings and connecting businesses in the sector.</p>	<ul style="list-style-type: none"> <li>• Support a diverse visitor economy by leveraging the region’s ECO Destination certification to grow the ecotourism offering, developing a collaborative regional tourism branding, and supporting the development of agritourism, regional sporting and entertainment events.</li> <li>• Support investment in visitor accommodation to support anticipated growth in tourism.</li> </ul>
<p>Support growth of emerging industries, including knowledge intensive, creative and green economy sectors.</p>	<ul style="list-style-type: none"> <li>• Engage with industry and training providers to develop training which matches industry demand and expand local capabilities in emerging sectors, including professional and creative industries.</li> <li>• Investigate opportunities to expand regional capabilities in circular economy processes.</li> </ul>
<p>Enhance regional resilience by supporting implementation of sustainable practices in engine industries and investing in robust physical and digital connectivity.</p>	<ul style="list-style-type: none"> <li>• Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.</li> <li>• Enhance the resilience of transport infrastructure against potential climate-related events, including by progressing alternate routes to major transport corridors and enhancing information management for road closures related to disaster events.</li> <li>• Facilitate accessible connections between regional communities and their surrounds, including through improved public transport connections, and establishing the potential for active transport corridors along major roads.</li> </ul>
<p>Support skills attraction and retention in population serving sectors, including health care and social assistance and education and training, through delivering sufficient and affordable key worker housing.</p>	<ul style="list-style-type: none"> <li>• Amend planning controls and support the infrastructure delivery required to develop and diversify the regional housing offering, including through enabling smaller dwellings and in-fill development in established urban centres.</li> </ul>

## 2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mice plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: Coramba Nature Reserve. Photo credit: Coffs Harbour City Council.



Figure 2: Enjoying the view from a lookout in Bellingen LGA. Photo credit: Bellingen Shire Council.



### 3. About the Coffs Coast region

The Coffs Coast FER is situated on the Mid North Coast of NSW and comprises the Bellingen Shire and Coffs Harbour Local Government Areas (LGAs), as shown below in Figure 3.

The region is around 495 kilometres north of Sydney, and around 345 kilometres south of Brisbane, with the Pacific Highway being the key connectivity route to other regions, along with inland connections via the Waterfall Way. The major regional city in the Coffs Coast region is Coffs Harbour, with Bellingen, Dorrigo and Urunga being other important smaller towns in the region.

Total area covered (km <sup>2</sup> )	2,774
Population (2021)	91,935
Coffs Harbour	78,738
Bellingen	13,197
Size of the economy (2020)	\$5.053 billion
Total employment (2021)	38,865

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021)

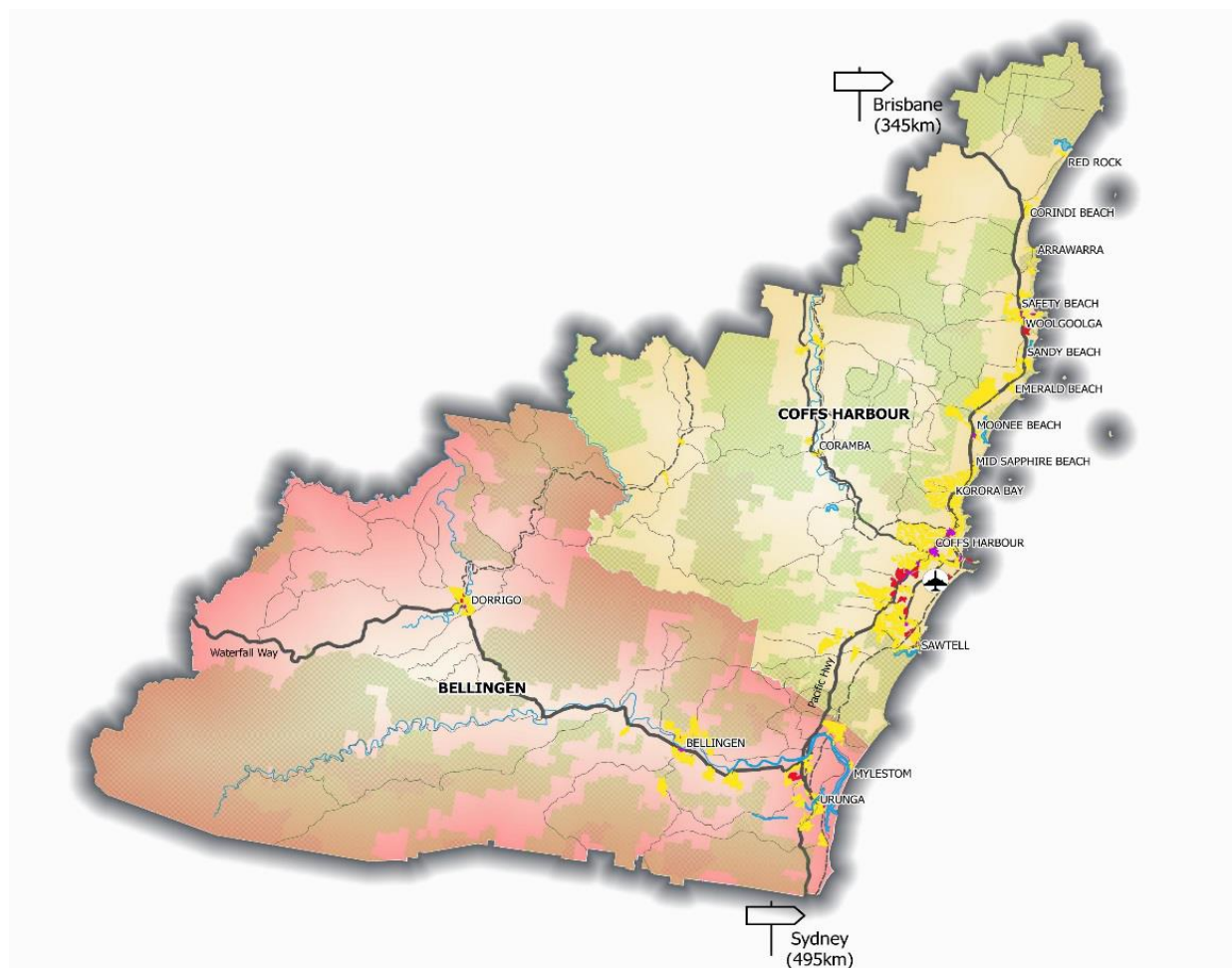


Figure 3: Map of the Coffs Coast Functional Economic Region.

## 4. The 2018 Coffs Coast REDS and 2020 bushfire addendum




In the 2018 Coffs Coast REDS, the region was actively pursuing growth of its key industry specialisations. Recognised endowments spanned natural, social and infrastructure assets, many of which were central to the overall approach to enabling economic development for the region.

### 2018 Coffs Coast strategies























	Grow the year-round visitor economy by further diversifying and promoting offerings and connecting businesses in the sector.
	Support healthcare and social assistance, tourism and professional and creative services industries by accompanying regional skills attraction and relocation programs with affordable housing supply.
	Assist the development of emerging agriculture industries in the sustainable, digital and for purpose economy to further build a clean, green and lean image.
	Manage needs of healthcare and social assistance, education and training, and manufacturing through a regional precincts and activity centres masterplan and investment program, and rezoning for industrial and commercial land use.
	<p>In addition to the core strategies above, the 2020 Coffs Coast Bushfire Impact Addendum highlighted a need to focus on:</p> <ul style="list-style-type: none"> <li>• <b>Short-term recovery</b> – from impacts on infrastructure and industry</li> <li>• <b>Long-term recovery</b> – ensuring that bushfires do not have an ongoing impact on perceptions about the region, and encouraging increased diversification within the region’s economic base.</li> </ul>

### 2018 Coffs Coast specialisations

Coffs Coast is home to a wealth of physical, institutional, built and human endowments. These endowments play a key role in enabling success and growth across its 2018 industry specialisations of health care and social assistance, agriculture, forestry and fishing and tourism.

	Health care and social assistance
	Agriculture, forestry and fishing
	Tourism

## 2018 Coffs Coast endowments

Endowment	Relevant 2018 specialisation
Southern Cross University	  
Business and industry co-operatives and organisations	  
Collaborative and effective local councils	  
Gumbaynggirr culture	
Breadth of creative and cultural industries	
Coastal amenity	 
Bellingen and Kalang rivers	 
Dorrigo Hinterland	 
Arable lands and climate	 
Harbour and foreshore areas (including Jetty Foreshores Precinct)	
Midpoint between Sydney and Brisbane	 
Road infrastructure (Pacific Highway and Waterfall Way)	 
Coffs Harbour Regional Airport and Precinct	
Accommodation capacity	
Access to the Sydney to Brisbane rail line	 
Coffs Harbour Health Campus	
Sports facilities (C.ex Coffs International Stadium and the Coffs Coast Sport Precinct)	
Coffs Campus Precinct	  
Justice Precinct	
National Broadband Network	  
Bellingen Valley Precinct	 

## 5. The big picture: Shocks and trends impacting the Coffs Coast region since 2018

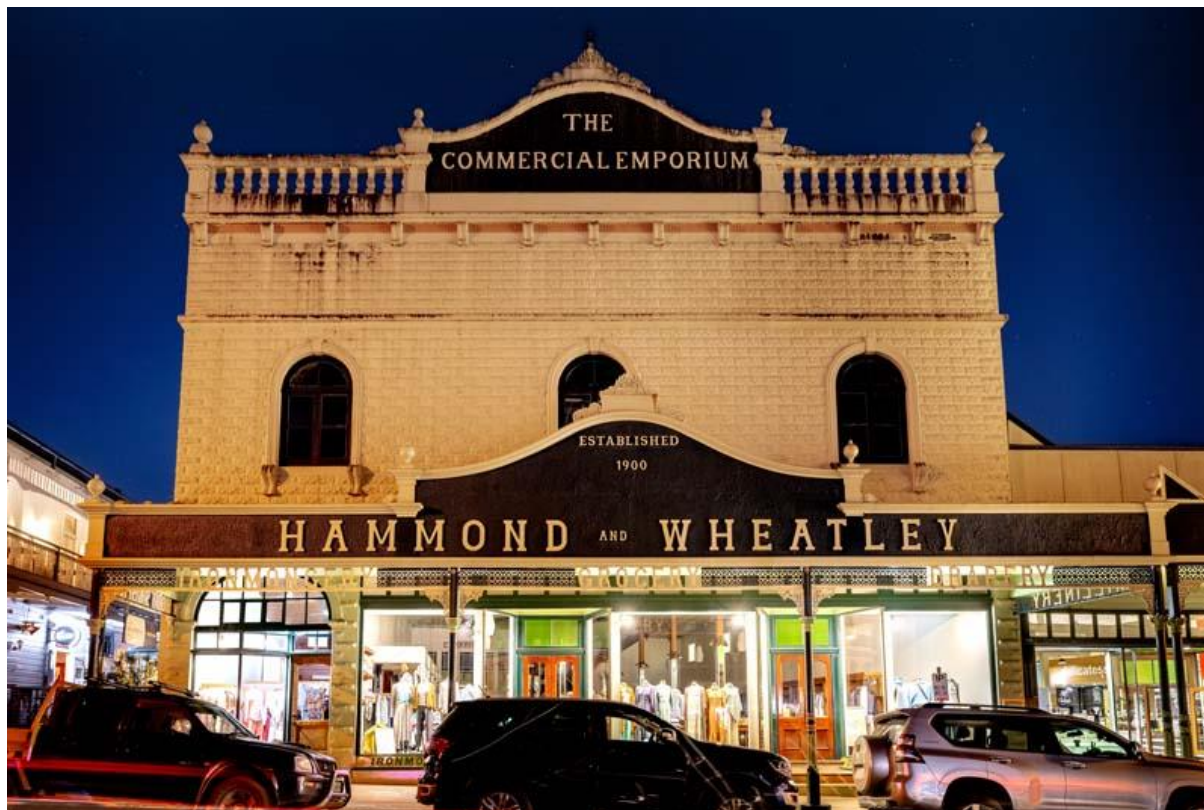


Figure 4: The Commercial Emporium Building in Bellingen LGA. Photo credit: Bellingen Shire Council.

### Significant events impacting major industries

A sustained period of drought followed by bushfires and flooding had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged Coffs Coast, with local businesses suffering, particularly those in the visitor economy which felt the impacts of movement and operating restrictions. From the period 2018 to 2022, the region had eight disaster declarations<sup>[1]</sup> and received \$15.61m in disaster recovery grants. Recovering from these events and developing both industry and community resilience remains a key priority for the region.

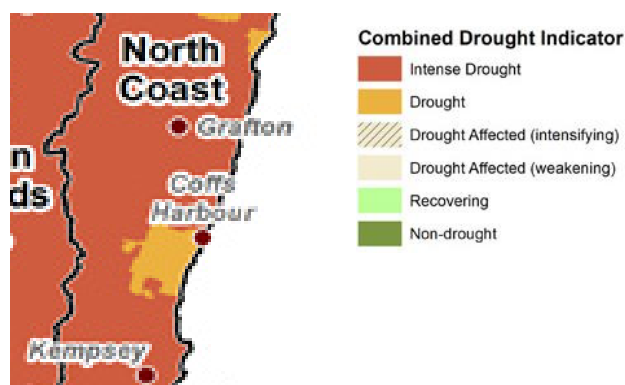


Figure 5: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

### Drought

The Coffs Coast region was impacted by a sustained period of below average rainfall and above average temperatures between 2019 to 2020. Between December 2019 to January 2020, the Bellingen River was at its lowest mean flow level since 1982.<sup>[2]</sup>

Along with direct impacts on water supply availability in the region, these conditions also impacted the productivity and output of the region's agriculture sector, a significant industry specialisation for the Coffs Coast.<sup>[3]</sup>

## Bushfires

Following a sustained period of drought, the region was hit by the 2019-2020 bushfires. Fires burnt around 9% of the region, with 64 properties damaged or destroyed, and around 350 kilometres of fencing reported destroyed.<sup>[4]</sup> Estimated damage to the local economy from the bushfires was around \$38 million.<sup>[5]</sup>

The short-term impact on the visitor economy was significant, with an estimated 40 to 60% downturn in tourism business revenue. The bushfires also led to substantial infrastructure damage and product loss within the agricultural and horticulture industries.

Alongside impacts on the visitor economy, this event also saw substantial infrastructure damage and product loss for agricultural and horticultural industries, along with indirect impacts from smoke disruption.<sup>[4]</sup>

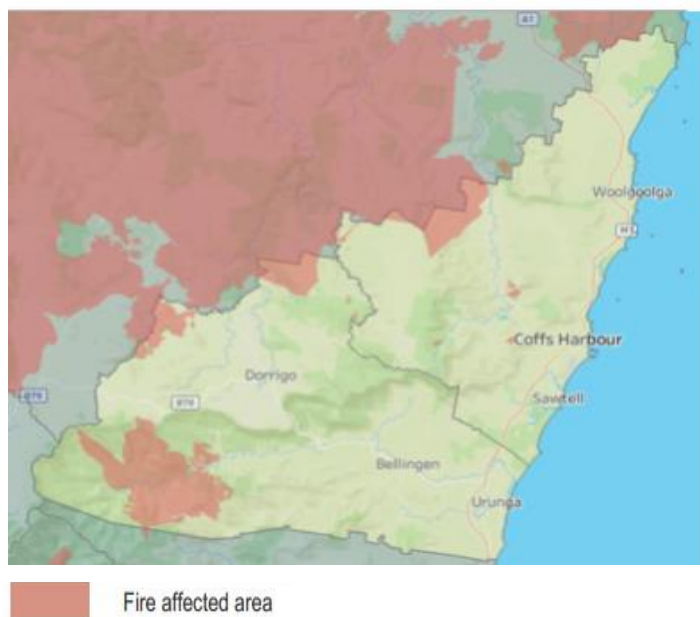


Figure 6: Areas impacted by the 2019-20 bushfires in the Coffs Coast region.

## COVID-19

The COVID-19 pandemic had a significant impact on the region, with 39% of businesses reporting that the pandemic negatively affected their business.<sup>[6]</sup> The region experienced significant job losses during the initial phase of the COVID-19 pandemic, in particular in key sectors such as tourism.<sup>[7]</sup>

In addition to impacts on businesses, the pandemic also impacted the wellbeing of residents, with Jobseeker recipients increasing by 60%, and healthcare card holders by 32%, between March and June 2020.<sup>[8]</sup>


## Floods and storms

The Coffs Coast region has been impacted by a number of major storm and flooding events in recent years that have resulted in significant damage to local property and infrastructure, including:

- a major storm centred around Corindi in February 2021, with more than 500mm of rain leading to houses being inundated, berry crops being destroyed, and a freight train being derailed,<sup>[9]</sup>
- major storms across the region in March 2021 led to significant damage to properties, flash flooding and a major landslip on the Waterfall Way,<sup>[10]</sup>
- a freak hailstorm hit Coffs Harbour in October 2021, causing major damage to vehicles, homes, businesses and a range of infrastructure,<sup>[11]</sup>
- the significant rainfall experienced across the eastern seaboard of Australia in early 2022 led to damage to land, property and stock in the region, as well as indirect impacts including supply chain disruptions and further damage to transport infrastructure, including Waterfall Way.<sup>[12]</sup>

## Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate, migration and supply chain uncertainty have played a significant role in the development of the Coffs Coast region since 2018 and are likely to continue to have a strong influence on its future. Further development of the region's digital economy capabilities and investigation of opportunities presented by the shift towards net zero both offer growth potential for the region.

Trend	Opportunities and risks	
 <p>Digital Transformation</p>	<p>Digital technologies present wide ranging applications across industries and can support the economic development of regions through increased productivity in engine industries. Ensuring that digital infrastructure is fit for purpose is vital to underpin continued economic growth as technology advances, and as people increasingly work from home following the COVID-19 pandemic.<sup>[13]</sup></p> <p>In the 2018 REDS, the Coffs Coast region stakeholders noted the recent uptake of National Broadband Network (NBN) technology had aided in improving business and personal connectivity. However, the quality of digital connectivity remains highly variable across the region, with areas in Bellingen in particular having poor levels of connectivity.</p>	<p>Robust telecommunications infrastructure is vital in ensuring communities have access to emergency information during disaster events. This was a key area of concern highlighted by communication challenges during the 2021 and 2022 flood events.</p> <p>Aligning training offered by local institutions in disciplines which support the skills needs of the digital economy can help enable future growth.</p>
 <p>Changing Migration Patterns</p>	<p>The COVID-19 pandemic increased the number of remote workers who are taking advantage of the regional lifestyle while maintaining metro-based employment, with regional NSW gaining an additional 26,800 residents across 2020 to 2021, while Sydney declined by 5,200.<sup>[14]</sup></p> <p>This impact was less pronounced in the observed population growth trend for the Coffs Coast. However, stakeholders noted that the availability of online education as a result of the COVID-19 pandemic has resulted in less youth moving out of the region to complete studies.</p>	<p>Leveraging the shift in youth migration patterns to build the local working age population can support local businesses.</p> <p>Ensuring an integrated approach to marketing the region as a lifestyle destination with strong economic opportunities can assist the region in leveraging population growth potential following the COVID-19 pandemic.</p>
 <p>Towards Net Zero</p>	<p>With industries including agriculture, manufacturing, electricity supply, construction, and transport all contributing over \$100 million to the Coffs Coast economy in 2020, a push to decarbonise in high-emitting sectors may present challenges for the region.</p> <p>However, the region already has a strong focus on considering opportunities associated with</p>	<p>The region's diversity of specialisations and existing tertiary education and training offerings can support growth in emerging green industries.</p> <p>Exploring opportunities to develop circular economy</p>













Trend	Opportunities and risks	
	<p>increasing sustainability and reducing emissions, with a focus on adoption of renewable energy, sustainable manufacturing processes and circular economy processes.</p>	<p>processing capabilities can support future growth and improve sustainability outcomes across the region.</p>
 <p>Rising Uncertainty</p>	<p>Ongoing supply chain issues have impacted on the cost and timelines of construction projects in the region.<sup>[15]</sup> This may impact the delivery of major infrastructure projects such as the Coffs Harbour Bypass, which could have flow-on effects for the local construction sector.</p> <p>Uncertainty for the region has also emerged as an issue since 2018 in planning for climate-related events, highlighted by significant shocks including the 2019-2020 bushfires and multiple flooding and storm events.</p>	<p>Developing regional capabilities in circular economy processing and manufacturing can aid in increasing sovereign supply chain capabilities.</p> <p>Ensuring the principles of resilience are integrated in infrastructure planning, design and delivery can help reduce the impacts of future shocks, in particular extreme weather events.</p>



Figure 7: Woopi Brewery in Coffs Harbour. Photo credit: Coffs Harbour City Council.





## 6. Responding to change: Initiatives and investments since 2018

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against key REDS priorities and strategies.















Strategies and plans	Relevant 2018 strategies
The <b>North Coast Regional Plan 2041</b> sets out strategic planning objectives for the broader region, with focus areas including facilitating growth in key industries, climate resilience, housing supply and place-making.	
Both councils have developed <b>Local Strategic Planning Statements</b> , which set out land use planning objectives in line with the Regional Plan.	
The <b>MyCoffs Strategic Plan 2032</b> and Bellingen's <b>Community Vision 2035</b> set out key actions for councils to seek to achieve the community's vision for the future in each LGA.	
The draft <b>Coffs Harbour Economic Development Strategy 2022-2027</b> aims to enable a thriving economy to support economic well-being and enhance quality of life in the LGA.	
Bellingen Shire Council's <b>Economic Development and Tourism Plan 2022-2026</b> guides actions to support economic development and facilitate partnerships with key businesses, tourism and community stakeholders.	
The <b>Bellingen Community and Carbon Plan</b> recognises an urgent need to enhance climate resilience, putting forward recommendations around community and council actions to improve sustainability.	
The Bellingen Shire <b>Local Housing Strategy 2020-2040</b> and the Coffs Harbour <b>Local Growth Management Strategy</b> both aim to support sustainable and productive population growth in the region.	
The NSW Government's <b>Coffs Harbour Regional City Action Plan 2036</b> aims to facilitate enhanced amenity and opportunity in Coffs Harbour.	
The <b>North Coast Destination Management Plan</b> highlights the need for coordinated and strategic management of tourism for the region, with a focus on growth opportunities for the local visitor economy.	
The <b>Bellingen Shire Tourism Brand Project</b> aims to create a tourism branding strategy for Bellingen, while the <b>Bellingen Shire Inclusive Tourism Strategy 2020 – 2025</b> seeks to ensure the LGA's tourism offering is accessible to all.	
The <b>North Coast Regional Water Strategy</b> sets out the long-term water management plan for the region, designed to support community and industry resilience and address strategic challenges facing the region.	





3	Big Banana tourist park upgrades	\$8.3 million	
4	Aanuka Beach Resort redevelopment	\$22 million	
5	Gumbaynggirr Giingana Freedom School <sup>1</sup>	Not available	
6	Buildonix Australia expansion <sup>2</sup>	>\$1.6 million	

### Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Coffs Harbour Bypass	\$2.2 billion	
2 Waterfall Way upgrade program	>\$87 million	
3 Bellingen Bridge Renewal Program	\$23 million	
4 Kalang Road upgrades	\$5 million	
5 Coffs Harbour Health Campus	\$194 million	
6 Yarrila Place	\$77 million	
7 Bellingen Sewering Coastal Villages	\$22 million	
8 Coffs Harbour Regional Airport Enterprise Park	\$30 million	
9 Wiigulga Sports Complex and Coffs Harbour Regional Sports Hub stage 2	\$43 million	
10 Coffs Harbour Marine Precinct	\$13 million	
11 Dorrigo Escarpment Great Walk	\$56 million	
12 Urunga Boardwalk upgrade	\$4 million	
13 National Cartoon Gallery extension	\$2.7 million	
14 Bellingen Memorial Hall cultural arts hub transformation	\$8 million	

<sup>1</sup> Supported by grant funding from the NSW Government.

<sup>2</sup> Supported by a grant from the NSW Government Regional Job Creation Fund.

## Regional grant programs

The region has received \$76.25 million in NSW grant commitments since 2018. A key program in the region has been the Stronger Country Communities Fund, with \$13.45 million committed to a range of projects ranging from new active transport infrastructure enhancements to a wide range of community, sporting, cultural and recreation projects.

Grant category	Approved funding
Community	\$34.89 million
Economic	\$25.76 million
Disaster recovery	\$15.61 million

*Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.*



Figure 9: The Bellingen Community Markets. Photo credit: Bellingen Shire Council.

## 7. Coffs Coast 2023 economic snapshot

The Coffs Coast population is growing and ageing, highlighting the importance in maintaining a strong supply of skilled labour

Although the region has seen consistent population growth over the past decade, there is a need for a continued focus on delivering social and community infrastructure that can support the attraction and retention of people in the prime working age to the region.

### Population growth

The region has recorded an average annual population growth rate of 0.8% between 2016 and 2021, with a slight slowing between 2019 and 2021 (see Figure 10). Looking ahead to 2031, this growth rate is expected to rebound to close to pre COVID-19 pandemic levels.<sup>[16]</sup>

Ensuring an affordable and available housing supply in the region, including for skilled workers will continue to be an important factor to enable future economic growth.

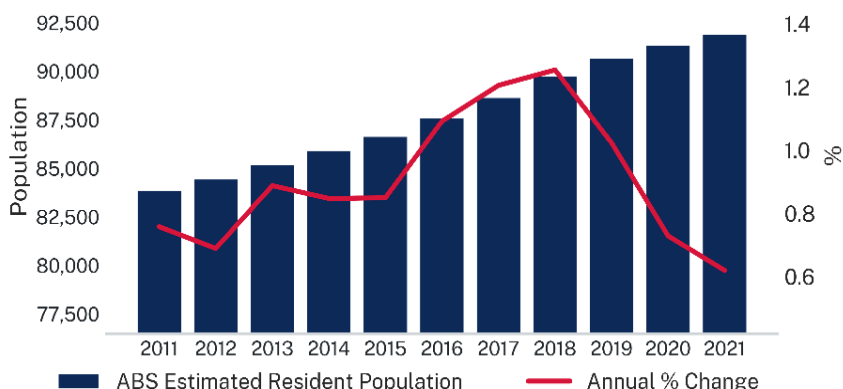


Figure 10: Coffs Coast FER population growth, 2011-2021 (ABS ERP, July 2022).

### Demographic profile

In 2021, the proportion of the region’s population that was over 55 years of age was 8% higher than the NSW average, while the proportion of the population in the 20 to 54 years bracket was 7.7% lower (see Figure 11). This highlights the need to focus on building the local population in their prime working age as a key mechanism for developing the skilled workforce needed to support economic growth and deliver major projects. Social infrastructure will be critical to achieving this goal, alongside ensuring a sufficient and affordable housing supply in the region.

The region’s specialisation in healthcare and social services places it in a strong position to cater for the needs of the region’s older residents. Supporting continued growth in this sector, particularly in aged care, can help ensure this segment of the local population maintains a high quality of life and access to a range of high quality services.

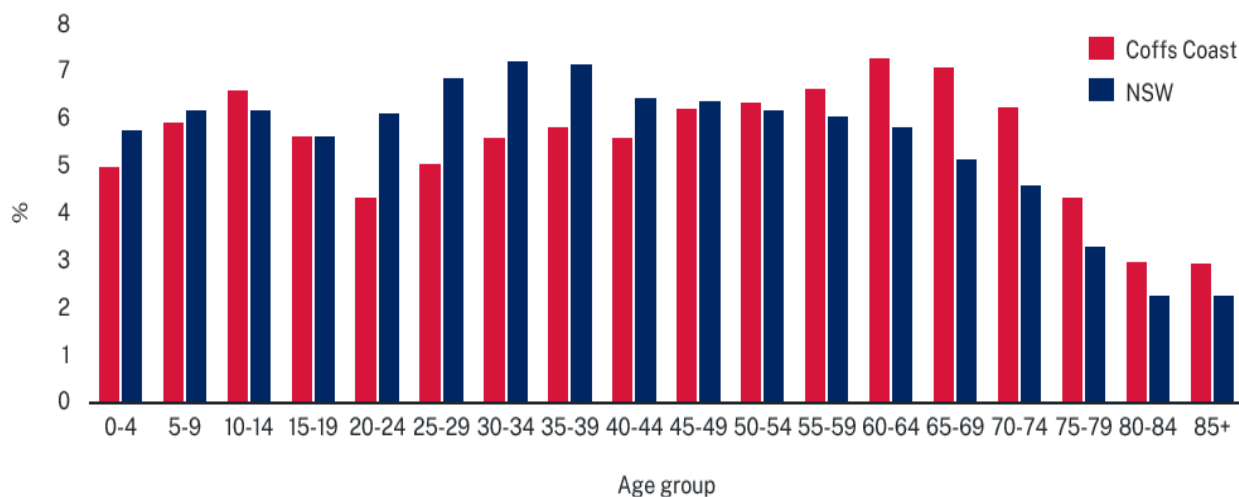


Figure 11: Coffs Coast FER population by age, 2021 (ABS ERP, July 2022).

## Improving housing supply in Coffs Coast will aid the region in attracting and retaining skilled workers to support industry growth

The region has faced a decline in housing availability and affordability since 2018. Enhancing this supply to cater for population growth will be critical in enabling the delivery and long-term success of major projects, as well as broader growth across local businesses.

### Housing availability

Residential vacancy rates in the region have dropped from 2.5% in January 2018 to 1.6% in August 2022 (see Figure 12). Across this period, fluctuations in vacancy rates ranging from 0.5% to 5.4% reflect a region impacted by successive major shocks, including the 2019-2020 bushfires, flooding, and internal migration brought about by the COVID-19 pandemic. Outside of a peak in June 2019, residential building approvals in the region have remained relatively stable, with no evident increase experienced in line with increased demand for housing brought about by a growing population in the region.

Ensuring housing availability can meet regional demand was highlighted in the 2018 Coffs Coast REDS as being a key strategic priority, particularly to support skills attraction and retention initiatives. In 2021, it was estimated that 74% of dwellings in Coffs Harbour LGA and 73% of dwellings in Bellingen Shire LGA were 3 bedrooms or above, despite an average household size of 2.3 and 2.4 persons respectively.<sup>[17]</sup> Improving housing stock diversity can assist with the attraction and retention of skilled workers, especially those in younger age groups. There is a clear need for an ongoing focus on improving the housing supply in the region.

### Housing affordability

Between June 2018 and June 2022, median house prices in the Bellingen LGA increased by 87% to \$887,000, and median house prices in the Coffs Harbour LGA increased by 54% to \$828,000.<sup>[18]</sup> Bellingen's increase was slightly higher than the total NSW experience (excluding Sydney) over the same period, which increased by 72%.<sup>[17]</sup> The estimated price-to-income ratio in 2021 for the Coffs Coast region was 9.74, which was above the NSW benchmark average of 8.12.<sup>[19]</sup> Further increases to house prices may constrain the ability of the region to attract and retain key and skilled workers given the region's price-to-income ratio is already relatively high, which could have implications for major project delivery and sustainable economic growth.

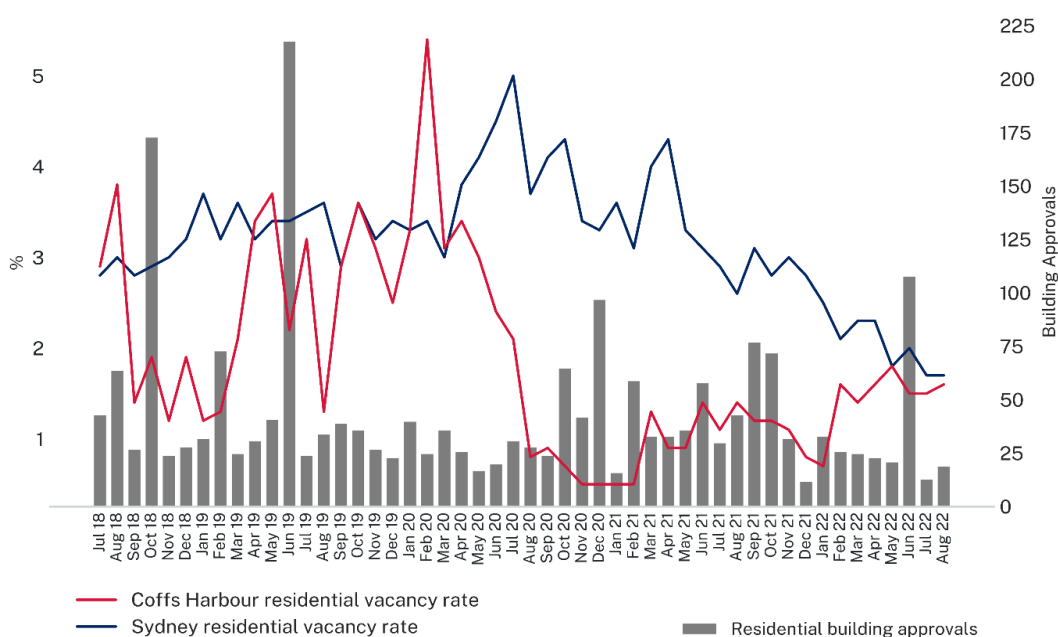


Figure 12: Coffs Coast FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022)

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region.

## The Coffs Coast region has seen unemployment decline since 2018, while job vacancies have more than doubled over the same period

A constrained labour market has been a key issue for the Coffs Coast region since 2018, with job vacancies more than doubling between 2020 and 2022, alongside substantial reductions in being recorded in unemployment rates across the region.

### Employment

As at June 2022, the Coffs Harbour LGA had an unemployment rate of 3.1% and Bellingen 3.4%, similar to the NSW benchmark of 3.3% (see Figure 13). Both LGAs have recorded a significant fall of over four percentage points in the unemployment rate since January 2018. The region's unemployment rate initially rose significantly during the early days of the COVID-19 pandemic, likely reflecting the impact of movement and operating restrictions on businesses, in particular for the tourism sector. However, since late 2020, the region has seen sustained reductions, with unemployment in both LGAs reaching a 5 year low in June 2022.

As shown in Figure 13, job vacancies in the broader North Coast region climbed to reach a record 4,595 in August 2022, having more than doubled since 2018. Occupations with particularly acute need for workers include carers and aides (449 vacancies) and medical practitioners and nurses (383). This represents a challenge given sustained population growth and an ageing population demographic in the region, both of which bring about increased demand for health and care services.

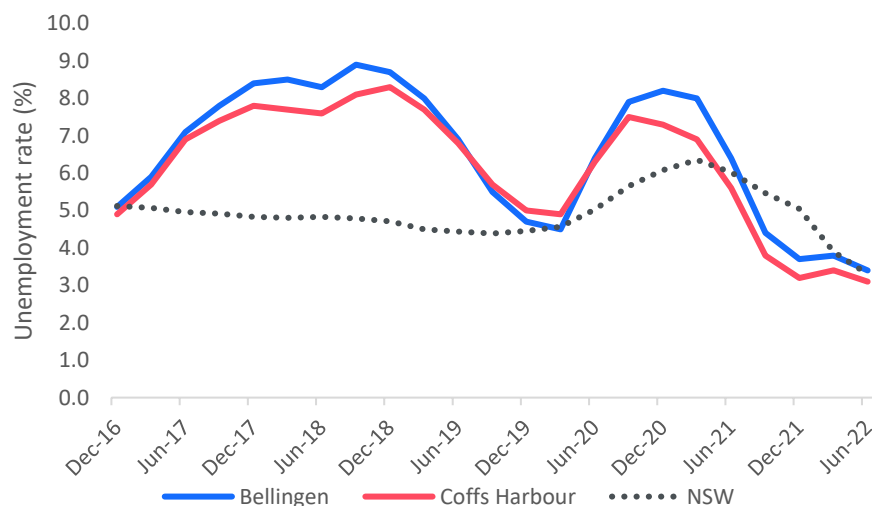


Figure 13: Coffs Coast FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 14: Job vacancies, NSW North Coast region (2018-Aug 2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI – National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region.

## Aboriginal employment

The Aboriginal unemployment rate in the Coffs Coast region has dropped significantly from 21.2% in 2011 to 10.8% in 2021. This rate remains above the NSW Aboriginal unemployment rate of 9.8% and the whole of NSW unemployment rate of 4.9%, but demonstrates positive progress being made to enhancing economic opportunities for the Aboriginal community in the Coffs Coast region.

Aboriginal unemployment rate: Coffs Coast	2011	21.1%
	2016	18.8%
	2021	10.8%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021.



Figure 15: A traditional smoking ceremony underway in Coffs Harbour LGA. Photo credit: Coffs Harbour City Council.

## Coffs Coast region 2023 engine and emerging industries

The Coffs Coast region is a diverse \$5.053 billion economy, with engine industries including agriculture, forestry and fishing, tourism, education training and healthcare. These engine industries have remained consistent since 2018, with each demonstrating growth and continuing to make a major contribution to the regional economy. The relative strength of these industries is highlighted through Location Quotient (LQ) analysis<sup>1</sup> as shown in Figure 16, in which the size of the bubbles correlates with industry size.

### Engine industries

The **agriculture, forestry and fishing** industry (LQ of 3.55) remains an engine industry for the region. Specialisations include fishing, hunting and trapping, aquaculture, forestry and logging, and other agriculture (including berries). The sector recorded average annual growth of 8.8% between 2011 and 2020, demonstrating its ongoing strong performance in the region.

Agriculture, forestry and fishing sectors are supported by a strong local **manufacturing** sector, which contributed \$201 million in 2020. Sawmill product (LQ of 4.3), processed seafood (LQ of 4.3) and dairy product (LQ of 6.1) manufacturing all represent regional specialisations.

The **tourism** sector (LQ of 1.73 for accommodation and food services) is a major contributor to the regional economy, with visitors spending \$649 million in 2021 despite COVID-19 pandemic related movement restrictions.<sup>[20]</sup> Recent investments in improved transport connectivity and major sports and visitor economy infrastructure upgrades will continue to support further sector growth.

With an LQ score of 1.35, the **construction** sector represents another industry specialisation, adding \$512 million to the local economy in 2020. A range of major projects, including the Coffs Harbour Bypass and the Coffs Harbour Health Campus Expansion, provide a pipeline of continued growth opportunities.

Population-serving sectors are also important economic contributors for the region, with **education and training** (LQ of 1.26) and **healthcare and social assistance** (LQ of 1.67) both representing specialisations.

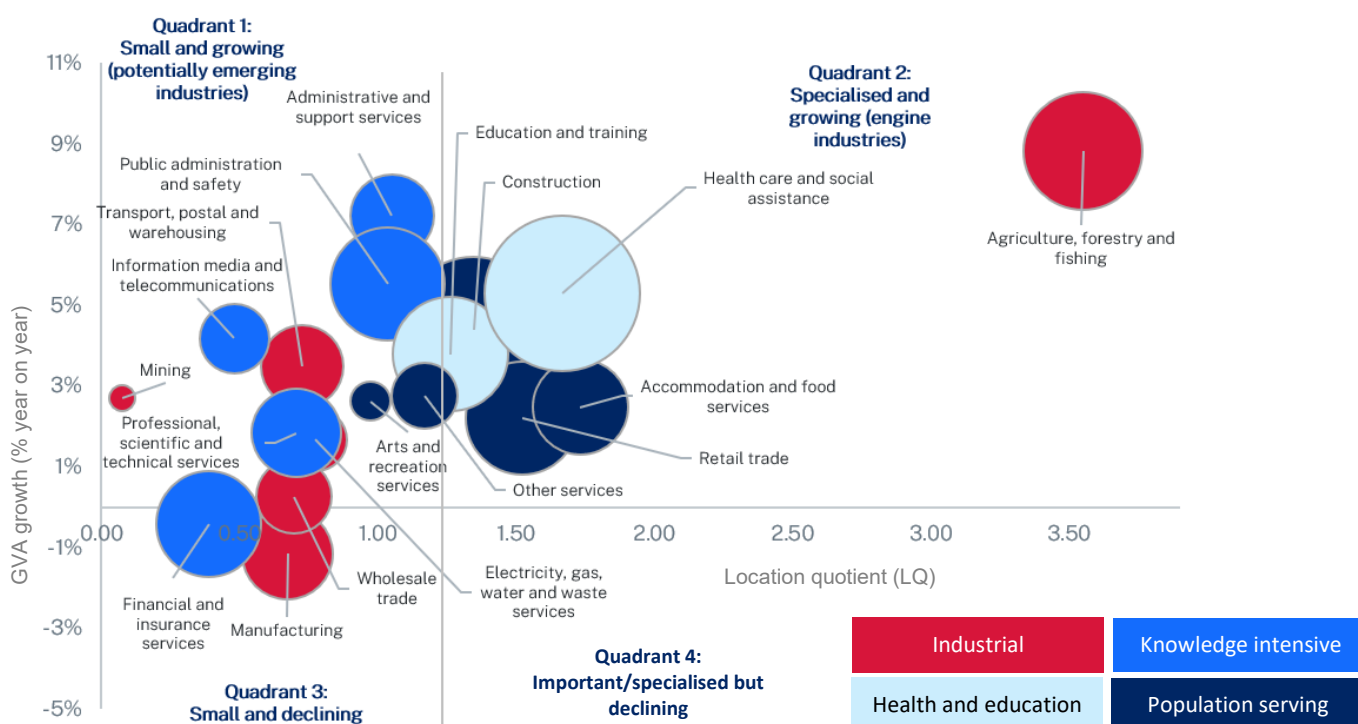


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used GVA data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

<sup>1</sup> LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.



## Emerging industries

Emerging industries in the Coffs Coast region are largely in knowledge-intensive sectors and the transport industry, particularly road transport (see Figure 17). Supporting further growth in these areas will aid efforts to develop a more diverse and resilient economy in the region.

Knowledge-intensive sectors including **professional, scientific and technical services** and **information media and telecommunications** have seen strong growth in the region over the past decade, adding \$194 million and \$119 million to GVA in 2020 respectively. There are potential investment opportunities in the latter sector, particularly in film production which could leverage the airport and land availability in the region and support expansion of the sector.<sup>[21]</sup>

The region's **arts and recreation sector** has also performed strongly since 2011, growing by an average of 2.6% per annum to add \$38 million to the local economy in 2020. Of this, the **sports and recreation** sector accounted for \$22 million, having benefited from a range of substantial infrastructure investments. Continuing to grow this sector offers potential for flow-on benefits for growth of the visitor economy sector through facilitating major regional sporting or other events.

The **transport, postal and warehousing** sector continues to be an emerging strength for the region. The road transport sector is a particular strength for Coffs Coast, contributing \$80 million of the industries total \$167 million GVA in 2020. Ongoing investments to further improve the road network in the region, including the Coffs Harbour bypass and Waterfall Way upgrades can help this sector to continue to grow in importance within the region's economy.

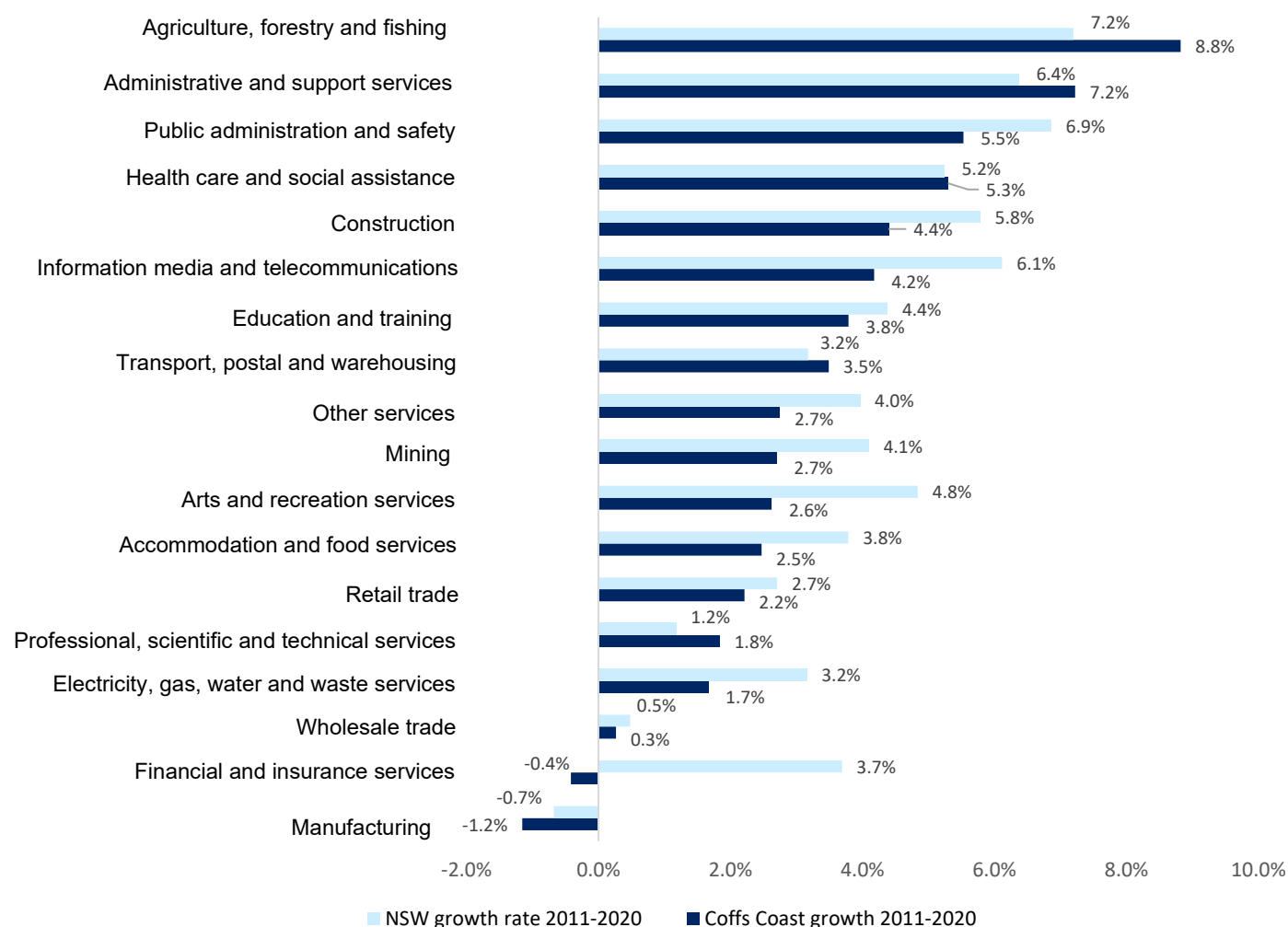


Figure 17: Change in GVA by industry (% YOY), 2011-2020 (REMPAN, 2020).

## Coffs Coast region 2023 endowments

### Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Coffs Coast's economy and regional competitiveness (see page 11). In some instances, major investments have enhanced, or will enhance these existing endowments, such as the major investments made into the Coffs Harbour Health Campus Expansion and regionally significant sporting infrastructure delivery. Despite recent shocks impacting many key endowments, consultation and analysis have affirmed that they broadly remain valid with key endowments including:

- institutional and cultural endowments, including education providers, local council cooperation, and Gumbaynggirr culture.
- physical and geographic endowments, including coastal amenity, Dorrigo hinterland, and strategic access to major markets.
- built endowments including health and education infrastructure, transport connections, and sporting facilities.

### New endowments

Recent policy efforts by the Coffs Harbour City Council and Bellingen Shire Council have led to the creation of a key new endowment that can underpin new economic opportunities within the visitor economy in the region.

+ ECO Destination Certification

Coffs Harbour became NSW's first certified ECO Destination in 2021, with Bellingen Shire Council currently undergoing the certification process. This internationally recognised program will provide a strong competitive advantage in attracting visitors to the region.



Figure 18: A couple walks along the Urunga Boardwalk in Bellingen LGA. Photo credit: Bellingen Shire Council

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## 8. Looking ahead: Strategic opportunities for growth, resilience and liveability

### Opportunities and vulnerabilities in engine and emerging industries

#### Tourism

The Coffs Coast region has been able to leverage its natural endowments and infrastructure to continue to grow its tourism industry. Future industry growth will be contingent on building resilience against climate change impacts and continuing to diversify the visitor economy in the region.

Visitor spend (2021, \$m) <sup>[20]</sup>	649
Employment (2021) <sup>a</sup>	8,133
LQ score (2020) <sup>b</sup>	1.73
LQ Accommodation (2020)	3.0
LQ Retail trade (2020)	1.5

<sup>a</sup> Summation of ANZSIC 1 digit Retail trade, Accommodation and food services and, Arts and recreation.

<sup>b</sup> LQ for Accommodation and food services

#### Strengths

- The Coffs Coast region is home to a wealth of natural endowments which attract visitors, including extensive coastline, world heritage rainforests, and state and national parks and reserves.
- High amenity foreshore precincts along the coast also offer a competitive advantage for the region in developing a distinct and varied tourism offering.
- Sitting at the mid-point between Sydney and Brisbane, with strong transport connections to both centres by both road and air, as well as strong transport connections to a range of nearby North Coast NSW destinations places the region in a strong strategic position in relation to the visitor economy.

#### Vulnerabilities

- Externalities strongly influence industry performance. This has been demonstrated since 2018, with bushfires, floods and COVID-19 pandemic-related restrictions reducing visitation (22% drop from 2019 to 2021) and spend (16% drop from 2019 to 2021) in the region.<sup>[20]</sup>
- Future natural disasters and the effects of climate change, such as variations in rainfall and coastal erosion, may impact destination viability and attractiveness. Robust services infrastructure and a diverse visitor economy offering will assist in improving industry resilience.

#### Opportunities

- ECO destination certification achieved by Coffs Harbour in 2021 (and underway for Bellingen Shire) serves as a unique selling point for the region, with potential to leverage this point of difference for growth of the regional ecotourism offering.
- Significant recent investment in sports and recreation infrastructure upgrades provides potential for growth in events-based tourism.
- The substantial investment to deliver the Dorrigo Escarpment Great Walk will provide a world class tourism experience that leverages the substantial natural beauty of the region to deliver a unique experience, that will also help encourage visitors to stay longer in the Coffs Coast region.

## Construction

Construction continues to be a significant source of economic output in the region, with a range of major investments being made that will continue to support strong growth in the sector.

GVA (2020, \$m)	512
Employment (2021)	3,896
LQ score (2020)	1.35
LQ Heavy and civil engineering (2020)	2.1
LQ Construction services (2020)	1.3

### Strengths

- The region's construction sector is one of its largest economic contributors, and the sector has recorded strong average annual growth of 4.4% between 2011 to 2020, despite significant disruption from natural disasters and the COVID-19 pandemic.
- Both residential and non-residential building construction made high-value contributions to the regional economy in 2020, contributing \$77 million and \$36 million respectively to GVA.

### Vulnerabilities

- Sustained increases in the price of raw materials, delays to sourcing materials, and challenges securing labour continue to place pressure on the sector.
- Global supply chain shortages have the potential to disrupt delivery capacity across the industry. The COVID-19 pandemic had significant impacts on the security of supply chains, and this is expected to continue to be an ongoing constraint for the industry in the short- to medium-term.<sup>[15]</sup>
- Materials and processes used in the construction sector have been recognised as being a major carbon emitter, hence progress to net zero and decarbonisation will likely require innovation and adaption from the sector.<sup>[22]</sup>

### Opportunities

- Major project commitments made since 2018, including the Coffs Harbour Bypass, the Coffs Harbour Health Campus Expansion and Waterfall Way upgrades, alongside a range of regionally significant projects and major private investment, can help sustain ongoing growth in the construction industry.
- A focus on investment into initiatives that help develop enhanced resilience in supply chains can help minimise the impact of external shocks on the sector, and potentially support enhanced economic development opportunities for local businesses.

## Healthcare and social services

The healthcare and social services sector is a major contributor to the Coffs Coast economy and opportunities exist to leverage health education and research capacity.

GVA (2020, \$m)	588
Employment (2021)	7,495
LQ score (2020)	1.67
LQ Residential care and social assistance (2020)	1.7
LQ Healthcare services (2020)	1.6

### Strengths

- The region's health network includes the Coffs Harbour Health Campus, which is a level five teaching hospital, as well as the major health referral centre for the region.
- Additional facilities which support health sector service delivery include the Bellingen River District Hospital, Baringa Private Hospital, and a range of allied health care providers.
- The region's health sector has well developed links to the education sector, with the University of NSW (UNSW) Rural Clinical School Coffs Harbour, the Southern Cross University Health Sciences Building and the Health Campus all providing significant local education endowments for the health sector.
- The region's specialisations in the sector include primary healthcare, as well as residential care and social assistance services.

### Vulnerabilities

- Like many parts of regional NSW, a significant challenge in the Coffs Coast is filling vacancies in the health sector, with strong demand for medical practitioners, nurses, carers and aides.
- The occupations most in demand in the region are also those most in demand across regional NSW, meaning there is broad-based competition across regional areas for these workers.
- Exacerbating issues associated with skilled workforce attraction is the tight housing market conditions being experienced in the region, which may restrict the capacity of service providers to attract and retain skilled health workers from outside of the region.

### Opportunities

- The \$194 million investment to upgrade the Coffs Harbour Health Campus will significantly enhance existing surgical and operating theatres, as well as add a range of additional facilities to support a wider range of services being provided in the Coffs Coast region.
- The region's emerging strengths in professional and scientific services alongside its tertiary education endowments can support development of medical research and health innovation capabilities in the region.
- The region's growing and ageing population, as well as the role of Coffs Harbour as a regional hub for health services, will continue to create additional demand for health services in the region.

## Agriculture, forestry and fishing

The region's long-held specialisation in primary production continues to drive economic growth in the region, but a focus is needed on enhancing climate resilience in the sector.

GVA (2020, \$m)	345
Employment (2021)	2,213
LQ score (2020)	3.55
LQ Forestry and logging (2020)	6.8
LQ Aquaculture (2020)	2.5
LQ Other agriculture (2020)	9.8

### Strengths

- The agricultural, forestry and fishing industry has long been a specialisation for the region, with average growth of 8.8% per year between 2011 and 2020 demonstrating resilience despite many shocks to the sector.
- Natural endowments including fertile agricultural land, significant forests, and extensive coastline, as well as high quality transport infrastructure linking the region to markets in the north and south.
- The industry's strength in the Coffs Coast region is diverse, with major agricultural exports including berries, beef, cattle and milk, alongside other regional specialisations in forestry and aquaculture.
- The region is also home to a significant manufacturing sector which contributes over \$200 million GVA to the local economy, with complimentary specialisations in that sector including seafood and dairy product manufacturing.

### Vulnerabilities

- The industry relies on the availability of land and viable climatic conditions for production, both of which may present vulnerabilities in the face of rising climate uncertainty.
- Macroeconomic factors beyond the control of producers may influence supply chains and commodity prices and have a significant influence on the value of outputs.

### Opportunities

- Investing in the uptake of agtech in primary production can enhance efficiency, productivity and output in the agricultural sector.
- A focus on implementing the principles of regenerative agriculture can help support sustained prosperity in the sector and assist with successful adaptation to changing climatic conditions.
- Facilitating greater collaboration with local value-add manufacturing can provide opportunities for greater value to be yielded from outputs.
- The Coffs Harbour food innovation ecosystem project completed in 2021 highlighted significant opportunities may exist in the region to support growth by developing a food innovation and cold chain logistics precinct, building an agri-food network in the region, and developing regional branding for the region's produce.<sup>[23]</sup>

## Key themes in stakeholder consultation

Stakeholders from the Coffs Coast region noted that the area has substantial opportunities to leverage major project investment to enhance amenity for residents and visitors, as well as catalyse growth across a range of industries in the region. Consultation highlighted that current key challenges include skills shortages and the need to build community, infrastructure and industry resilience given impacts from a range of natural disasters and external shocks in recent years.

### Matching the local training offering with industry needs

As reflected by the analysis of employment in the region, stakeholders highlighted that the region is facing significant skills shortages. Consultation highlighted a need to focus on enhancing the local skills capacity to enable industry growth. Stakeholders saw a focus on development of underutilised parts of the workforce as being a key regional priority, with a need to ensure local training offerings align with the skills needed by engine and emerging industries in the region.

### Maximise local benefits from major projects

Stakeholders highlighted a keen desire to ensure that planning for major projects clearly considers the need to deliver long term, lasting benefits to the regional community. A key focus during consultation was discussion of the Coffs Harbour Bypass and opportunities to investment in reshaping the city of Coffs Harbour.

### Building resilience

A range of recent natural disasters, alongside the impacts of the COVID-19 pandemic have brought the need to build principles of resilience into policy and programs to the forefront of many stakeholders' minds. Stakeholders highlighted a need to focus on infrastructure resilience, given natural disasters in recent years have significantly impacted critical transport connections, such as the Waterfall Way.

Ongoing investment to upgrade physical and digital connectivity infrastructure was also highlighted as a key priority for the region. This was highlighted as a priority for Bellingen Shire, given ongoing challenges faced in the LGA associated with maintaining reliable physical and digital connectivity during natural disasters and major weather events.

## Coffs Coast REDS – 2023 Update strategies

While the broader strategic focus of the 2018 REDS remains relevant to Coffs Coast, the outcomes of consultation and analysis undertaken has demonstrated the need to refocus the strategies to better focus on current priorities. Changes have been made to the strategies to place a key focus on:

- enhancing regional resilience for key engine industries through a focus on sustainable practices and investment into robust physical and digital connectivity.
- supporting growth in emerging industries in the region, including knowledge intensive, creative and green economy sectors.
- initiatives associated with delivering sufficient housing supply to meet key worker needs associated with key population serving sectors in the Coffs Coast region.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Coffs Coast region are listed below (amendments made to 2018 strategies are highlighted in **bold**):

Existing	Grow the year-round visitor economy by further diversifying and promoting offerings and connecting businesses in the sector.
New	<b>Support growth of emerging industries, including knowledge-intensive, creative, and green economy sectors.</b>

New	Enhance regional resilience through supporting implementation of sustainable practices in engine industries and investing in robust physical and digital connectivity.
New	Support skills attraction and retention in population-serving sectors, including healthcare and social assistance and education and training, through delivering sufficient and affordable key worker housing.

## Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short- to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New enablers		Lead and support	Rationale
Grow the year-round visitor economy by further diversifying and promoting offerings and connecting businesses in the sector.	Government, regulation and information	Support a diverse visitor economy by leveraging the region's ECO Destination certification to grow the ecotourism offering, develop a collaborative regional tourism branding, and support the development of agritourism, regional sporting and entertainment events.	Local councils, Destination NSW, Destination North Coast	The region's ECO Destination certification provides a unique point of difference which can be built on to diversify and grow the regional tourism offering.
	Infrastructure	Support investment in increased visitor accommodation to support anticipated growth in tourism.	Local councils, Destination NSW, Destination North Coast	Adequate accommodation offerings are essential to an expanded visitor economy offering.
Support growth of emerging industries, including knowledge intensive, creative, and green economy sectors.	People and skills	Engage with industry and training providers to develop training which matches industry demand and expand local capabilities in emerging sectors including professional and creative industries.	Training Services NSW, local council, chambers of commerce, Southern Cross NSW	A skills shortage represents a key challenge for the region, which may impact on future growth in the region's emerging sectors.



Strategy	New enablers		Lead and support	Rationale
	Government, regulation and information	Investigate opportunities to expand regional capabilities in circular economy processes.	<b>Local councils,</b> Investment NSW, Department of Regional NSW (DRNSW)	The current approach to waste management is not sustainable, particularly given population growth. Developing circular economy processing capabilities can help address this challenge while also supporting future economic growth.
<b>Enhance regional resilience by supporting implementation of sustainable practices in engine industries and investing in robust physical and digital connectivity.</b>	Infrastructure	Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.	<b>NSW Telco Authority,</b> DRNSW, local councils	Poor connectivity was highlighted as a major issue for businesses and residents operating in the Coffs Coast region
	Infrastructure	Enhance the resilience of transport infrastructure against potential climate related events, including by progressing development of alternate routes to major transport corridors, and enhancing information management for road closures related to disaster events.	<b>Transport for NSW (TfNSW),</b> local councils	Recent flood events highlighted susceptibility of the region's road network to climate-related damage and interruption.
	Utilities, services and infrastructure	Facilitate accessible connections between regional communities and their surrounds, including through improved public transport connections and establishing the potential for active transport corridors along major roads.	<b>TfNSW,</b> local councils, DRNSW	Enhancing local connectivity will improve amenity and liveability, with flow-on benefits in aiding workforce attraction and retention.

Strategy	New enablers		Lead and support	Rationale
<p>Support skills attraction and retention in population serving sectors, including health care and social assistance and education and training, through delivering sufficient and affordable key worker housing.</p>	<p>Land use</p>	<p>Amend planning controls and support the infrastructure delivery required to develop and diversify the regional housing offering, including enabling smaller dwellings and in-fill development in established urban centres.</p>	<p><b>Local councils,</b> Department of Planning and Environment (DPE) - Planning</p>	<p>Ensuring housing supply meets the needs of existing and incoming residents will aid skilled worker attraction and retention in the region.</p>



Figure 19: Coffs Harbour Regional Airport. Photo credit: Coffs Harbour City Council.

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Figure 20: Thora landslide repair works underway on Waterfall Way. Photo credit: Bellingen Shire Council.