



Regional  
Development  
*Australia*  
CENTRAL COAST NSW



An Australian Government Initiative



A NSW Government Initiative

# REGIONAL PLAN

## 2015-2017

## FROM THE CHAIR...

The final draft of the 2015 – 2017 Regional Plan has drawn upon ideas and strategies from key organisations, regional leaders and all levels of government to articulate regional priorities for the Central Coast.

These priorities are designed to address the significant challenges and opportunities that face the Central Coast as a region, which is maturing and successful, rich in natural, capital and human assets.

With significant population growth predicted for the region, there is a critical need to generate more than 30,700 new jobs on the Central Coast by 2031. This is a major economic development challenge, which needs to be addressed as a priority.

The Development of the Regional Plan is a journey, a work-in-progress that reflects contributions from organisations and key community leaders from across the region, to articulate an overall strategic direction for the Central Coast. Regional Development Australia Central Coast (RDA Central Coast) Committee and Staff are proud to take a leadership role in this journey.

However, ongoing collaboration and partnership will be critical to the region's continuing success and is a decisive feature of the Regional Plan. Through effective collaboration and partnership with community, business groups and all three levels of government, stakeholders will participate in discussion, debate critical issues and then play a role in delivering the priorities that will drive the future prosperity of the region.

Celebrating our advantages and working to overcome our challenges, together we have an enormous opportunity to prosper as a vibrant, modern community with a sustainable and enviable lifestyle.

Recent wins for the Central Coast – including announcements made in September 2014 that \$464 million of Development Applications have been received by Gosford Council and that Wyong Council has \$4 billion of investment proposals in its pipeline, are significant achievements that can be credited to a united focus from all levels of government and the community.

RDA Central Coast applaud the leadership shown by Gosford and Wyong Councils and by our State and Federal Members which have played a critical role in bringing these essential regional development initiatives to fruition. These initiatives will benefit the entire Central Coast, and will play a significant role in creating a strong and sustainable future for the region.

The RDA Central Coast Committee and Staff see 2015 as the start of a bright future for our region, a future in which RDA Central Coast will continue to act as an effective conduit to build effective partnerships between governments, regional development organisations, local businesses, community groups and key regional stakeholders - to provide strategic and targeted responses to economic, environmental and social issues affecting the Central Coast.



Phil Walker  
**Acting Chair**  
**Regional Development Australia Central Coast**

## EXECUTIVE SUMMARY

The 2015 – 2017 Regional Development Australia Central Coast Regional Plan aims to build on the success of the previous Regional Plans and to draw together the strategic priorities of the various government and non-government bodies working across the Central Coast, to ensure that the needs of the region are being articulated appropriately and that those identified needs are being addressed by way of investment and local action.

The primary purpose of this plan is to present a consolidated depiction of the NSW Central Coast region - to set out the strengths and opportunities for the region as well as challenges, issues and priorities.

### Regional Profile

The Central Coast region incorporates the Local Government Areas of Gosford City and Wyong Shire, having a total area of some 1,854 square kilometres. The geography of the region is characterised by extensive lakes and waterway systems, along with coastal beaches and mountain forest areas. The natural environment of the Central Coast is unique and diverse, including extensive coastal and marine environments, providing for distinct lifestyle and promotional advantages, but also creating key issues of job creation and sustainable economic development.

An assessment of the available regional data and the development of the Economic ID website provided for the opportunity for statistical analysis of a vast array of regional data which has been compiled as the Regional Profile which is attached to this Regional Plan.

A clear message from the Regional Profile evaluation process highlights that while the region has enviable strengths such as lifestyle advantages; unprecedented regional collaboration presenting a cohesive and united approach to articulating regional goals; a strong tourism base; growing health and education sectors and proximity to Sydney and Newcastle markets, it also has its challenges. These challenges include a growing and aging population, inadequate and/or aging infrastructure, high out-commuting levels, high youth unemployment, and the need to greatly improve education levels.

### Vision & Regional Priorities

RDA Central Coast activities, development of regional priorities and delivery of on-the-ground projects are largely directed by its vision statement.

#### *Making a Positive Difference to the Central Coast.*

*This will be achieved by bringing the community together to encourage discussion, debate and to prioritise the infrastructure needs of the Central Coast and communicating these priorities, with sound reason/justification and community agreement.*

RDA Central Coast has developed six key priorities and associated activities to deliver this vision.

### Creating Long Term Sustainable Economic Growth and Job Creation

Perhaps the greatest challenge is to create local job opportunities to match population and labour force growth, whilst protecting the Region's natural environment. The proportion of the adult workforce commuting out of the Region for work is over 25 per cent, resulting in a range of specific infrastructure and social challenges. The Region needs to take advantage of its location between Sydney and Newcastle, to increase employment self-containment, and reduce the need for out-commuting. Providing capacity for over 30,750 new jobs over the next 20 years will help ensure economic growth.

RDA Central Coast believes that the provision of job-enabling infrastructure is a priority issue for the region. In 2014, RDA Central Coast will lead the development of a 'Regional Infrastructure Priorities List', which will clearly articulate the job-enabling infrastructure required for the region.

## **Improve Skills Development and Educational Outcomes**

There is a recognised need to greatly improve education levels within the Central Coast region to reduce unemployment, grow the economy and to become a world class 'learning region'. RDA Central Coast will work with the Regional Economic Development & Employment Strategy (REDES) Future Skills Strategic Implementation Group to support Local Councils in establishing pathways for the Central Coast community to take up tertiary education. This will create new regionally significant educational opportunities and develop new educational and learning infrastructure for the Central Coast.

## **Enhanced Regional Collaboration and Capacity Building within the Region**

RDA Central Coast will continue to maintain its key role in promoting discussion and discourse between all levels of government, business, education and the community on the Central Coast. We will continue to implement the Regional Economic Development & Employment Strategy (REDES) to provide unprecedented regional collaboration for dealing with key issues of significance for the region, and we will involve ourselves in community forums, regional round tables and networking events.

We will continue to support all our partners in establishing and maintaining a strong policy, strategic and governance framework, which provides the basis for future growth and prosperity of the region.

## **Embracing the Digital Economy**

The early rollout of the NBN provides the Central Coast with a significant advantage to leverage opportunities ahead of many other regions. RDA Central Coast will aim to ensure that the region obtains maximum benefit from the early NBN rollout and will undertake appropriate activities to continue to advocate for the emerging digital economy. RDA Central Coast will continue to support the Central Coast Teleworking Strategy and the development of Smart Work Hubs, as well as the delivery of the 'Digital Enterprise' program and continuing coordination of the Central Coast Broadband Implementation Group.

## **Regional Innovation**

RDA Central Coast will continue to partner with Innov8Central to implement the Central Coast Innovation Plan. The Innovation Plan was developed by regional stakeholders with the core aim to improve the quality of life for Central Coast residents by improving the quality of the regional economy.

## **Marketing the Central Coast Region**

There will be a continued focus on improving the image of the region and marketing the Central Coast as a place for business investment and lifestyle. We will partner with all levels of government, business and the greater community to develop a united regional marketing effort, and we will support events and activities that portray the positive attributes of the region. This includes working with partners to create and secure conferences, events and activities that highlight the best qualities of the Central Coast.

## **Next Steps**

It is vital that the regional priorities outlined in this RDACC Regional Plan align with and compliment the priorities outlined in other regional strategic documents of key stakeholders to provide the over-arching regional perspective and 'voice' for the issues, challenges and priorities for the region.

RDA Central Coast is committed to work collaboratively to deliver these regional priorities to make a positive difference to the Central Coast.



John Moulard  
Chief Executive Officer  
Regional Development Australia Central Coast

# CONTENTS

<b><u>1.</u></b>	<b><u>A VISION FOR THE NSW CENTRAL COAST</u></b>	<b>1</b>
1.1.	<u>A Shared Vision for the Central Coast</u>	1
<b><u>2.</u></b>	<b><u>THE ROLE OF RDA CENTRAL COAST</u></b>	<b>2</b>
2.1.	<u>What is Regional Development Australia?</u>	2
2.2.	<u>RDA NSW Central Coast</u>	2
2.3.	<u>Key Focus of RDA</u>	2
2.4.	<u>Government Priorities</u>	3
2.4.1.	<u>Federal Government Priorities</u>	3
2.4.2.	<u>NSW State Government Priorities</u>	3
2.4.3.	<u>Local Government Priorities</u>	4
2.4.4.	<u>Wyong Shire Council Strategic Priorities</u>	4
2.4.5.	<u>Gosford City Council Strategic Priorities</u>	7
2.5.	<u>The Purpose of this Regional Plan</u>	8
2.6.	<u>Bringing it all Together – The Regional Strategic Context</u>	8
<b><u>3.</u></b>	<b><u>THE CENTRAL COAST REGIONAL ANALYSIS</u></b>	<b>9</b>
3.1.	<u>Human Capital</u>	10
3.2.	<u>Sustainable Communities and Population Growth</u>	11
3.2.1.	<u>Economic</u>	11
3.2.2.	<u>Environmental</u>	13
3.2.3.	<u>Social Demographics and Health &amp; Aging</u>	14
3.2.4.	<u>Population Growth</u>	15
3.3.	<u>Access to international, national and regional markets</u>	16
3.3.1.	<u>Proximity to Sydney &amp; Newcastle</u>	16
3.3.2.	<u>Export Industries</u>	16
3.3.3.	<u>Regional Infrastructure</u>	16
3.4.	<u>Regional Arts, Creative and Sporting Industries</u>	18
<b><u>4.</u></b>	<b><u>REGIONAL PRIORITIES</u></b>	<b>19</b>
4.1.	<u>Creating Long Term Sustainable Economic Growth and Job Creation</u>	19
4.2.	<u>Improve Skills Development and Educational Outcomes</u>	19
4.3.	<u>Enhanced Regional Collaboration and Capacity Building within the Region</u>	19
4.4.	<u>Embracing the Digital Economy</u>	19
4.5.	<u>Regional Innovation</u>	20
4.6.	<u>Marketing the Central Coast Region</u>	20

<b>5.</b>	<b><u>RDA PROJECTS, ACTIVITIES &amp; INITIATIVES</u></b>	<b>21</b>
5.1.	<u>Regional Economic Development &amp; Employment Strategy (REDES)</u>	21
5.2.	<u>Development of a Central Infrastructure Priority List</u>	21
5.3.	<u>Provision of Regional Statistics, Data and Information</u>	22
5.4.	<u>Regional Sponsored Migration Scheme (RSMS)</u>	22
5.5.	<u>Regional Workforce Development – Health and Community Sectors</u>	22
5.6.	<u>Education and Future Skills</u>	23
5.7.	<u>Marketing the Central Coast as a Business Location</u>	23
5.8.	<u>Management of NSW Arts Program: Art Central 2013–2016 Phase 2</u>	23
5.9.	<u>Grants/Funding Advocacy</u>	24
5.10.	<u>High Speed Broadband Rollout, Digital Strategy and Advocacy</u>	24
5.11.	<u>Business Incubator Strategy/Smart Work Hub</u>	24
5.12.	<u>Promotion of Regional Discourse/Discussion and Support Business Networks</u>	25
5.13.	<u>Centres Development</u>	25
5.14.	<u>Central Coast Innovation Strategy</u>	26
<b>6.</b>	<b><u>SUMMARY OF REGIONAL PRIORITIES &amp; PROJECTS</u></b>	<b>27</b>
6.1.	<u>Background</u>	28
6.2.	<u>Key Statistics</u>	28
6.3.	<u>Human Capital</u>	30
	<u>6.3.1. Education Profile of the Workforce</u>	30
	<u>6.3.2. School Education</u>	31
	<u>6.3.3. Fields of Qualifications</u>	32
	<u>6.3.4. Education Providers</u>	33
6.4.	<u>Sustainable Communities and Population Growth</u>	34
	<u>6.4.1. Average Household Income</u>	34
	<u>6.4.2. Unemployment and Employment Status</u>	35
	<u>6.4.3. SEIFA Index of Disadvantage</u>	36
	<u>6.4.4. Out-commuting</u>	36
	<u>6.4.5. Changes in Industry Composition</u>	36
	<u>6.4.6. Value Added Industries</u>	39
	<u>6.4.7. Water and Environmental Management</u>	41
	<u>6.4.8. Urban Growth Pressures</u>	43
	<u>6.4.9. Cultural Diversity and Indigenous Population</u>	44
	<u>6.4.10. Regional Demographics</u>	45
	<u>6.4.11. Household and Family Types</u>	47
	<u>6.4.12. Population Growth</u>	48
6.5.	<u>Access to International, National and Regional Markets</u>	49
	<u>6.5.1. Proximity to Sydney &amp; Newcastle</u>	49

<a href="#">6.5.2. Export Industries</a>	49
<a href="#">6.5.3. Regional Infrastructure</a>	51
<a href="#">6.5.4. Regional Communications</a>	51
<a href="#">6.5.5. Regional Networks and Industry Clusters</a>	53
<a href="#">6.6. Comparative Advantage and Business Competitiveness</a>	54
<a href="#">6.6.1. Regional Arts, Creative and Sporting Industries</a>	54
<a href="#">6.6.2. Regional Competiveness</a>	56
<b><a href="#">RESOURCES</a></b>	<b>61</b>

## LIST OF TABLES

<a href="#">Table 1 - Strengths, Challenges, Needs &amp; Opportunities in Education &amp; Skills</a> .....	10
<a href="#">Table 2 - Strengths, Challenges, Needs &amp; Opportunities in Job Creation &amp; Value Adding Industries</a> .....	12
<a href="#">Table 3 - Strengths, Challenges, Needs &amp; Opportunities in Environmental Factors</a> .....	13
<a href="#">Table 4 - Strengths, Challenges, Needs &amp; Opportunities in Health &amp; Aging Services</a> .....	14
<a href="#">Table 5 - Strengths, Challenges, Needs &amp; Opportunities in Population Growth</a> .....	15
<a href="#">Table 6 - Strengths, Challenges, Needs &amp; Opportunities in Regional Infrastructure</a> .....	17
<a href="#">Table 7 - Strengths, Challenges, Needs &amp; Opportunities in Regional Arts, Creative and Sporting industries</a> .....	18
<a href="#">Table 8 - Central Coast Key Statistics</a> .....	28
<a href="#">Table 9 - SEIFA Index of Disadvantage</a> .....	36
<a href="#">Table 10 - Regional Competitiveness</a> .....	56
<a href="#">Table 11 - Stakeholder Engagement and Collaboration Activities</a> .....	60

## LIST OF FIGURES

<a href="#">Figure 1 - Infrastructure Map Central Coast</a> .....	29
<a href="#">Figure 2 - Highest Qualification Achieved 2011</a> .....	30
<a href="#">Figure 3 - Highest level of secondary schooling completed 2011</a> .....	31
<a href="#">Figure 4 - Workforce Field of Qualification 2011</a> .....	32
<a href="#">Figure 5 - Weekly Household Income 2011</a> .....	34
<a href="#">Figure 6 - Unemployment Rates</a> .....	35
<a href="#">Figure 7 - FTE Employment by Industry Sector</a> .....	37
<a href="#">Figure 8 - Change in Employment (FTE) 2007/08 to 2012/13</a> .....	38
<a href="#">Figure 9 - Value Added by Industry Sector</a> .....	39
<a href="#">Figure 10 - Change in Value Added by Industry Sector, 2006/07 to 2012/13</a> .....	40
<a href="#">Figure 11 - Central Coast Dams - Total Storage</a> .....	41
<a href="#">Figure 12 - Central Coast - Total Monthly Water Demand</a> .....	42
<a href="#">Figure 13 - Mangrove Dam</a> .....	42
<a href="#">Figure 14 - Language spoken at home</a> .....	44
<a href="#">Figure 15 - Age Structure</a> .....	45
<a href="#">Figure 16 - Change in Age Structure</a> .....	46
<a href="#">Figure 17 - Household Type 2011</a> .....	47
<a href="#">Figure 18 - Change in Household Type 2006-2011</a> .....	47
<a href="#">Figure 19 - Population Growth</a> .....	48
<a href="#">Figure 20 - Total Exports by Industry Sector</a> .....	50
<a href="#">Figure 21 - Broadband Rollout as at Aug 2014</a> .....	52
<a href="#">Figure 22 - Gosford Regional Gallery and Arts Centre</a> .....	54
<a href="#">Figure 23 - Terrigal Rugby Club</a> .....	55

## A VISION FOR THE NSW CENTRAL COAST

### A Shared Vision for the Central Coast

The shared vision for the Central Coast has been arrived at after consultations and discussion with key stakeholders, as well as review of important strategy documents for the Central Coast.

In all discussions, there are three (3) key elements which are evident:

1. **The need for a vibrant regional economy** - growing employment in our existing industry sectors and attracting new investment to the region;
2. **The protection of the natural assets of the region** – one of the key assets of the region is the natural environment including bushland reserves, national parks, beaches, waterfronts and coastal lake systems; and
3. **An inclusive community** – a vibrant community in which residents (and visitors) can experience events, education, entertainment and feel pride at being a 'part' of the community of the Central Coast as well as feeling safe, secure and content.

Drawing on these key components, a shared vision for the region has been devised as follows:

### OUR VISION FOR THE CENTRAL COAST

#### **“The Voice for the Central Coast”**

We will achieve this by bringing the community together to encourage discussion, debate and to prioritise the infrastructure needs of the Central Coast and by communicating these priorities, with sound reason/justification and community.

## THE ROLE OF RDA CENTRAL COAST

### What is Regional Development Australia?

Regional Development Australia (RDA) is a partnership between the Australian Federal, State, Territory and Local governments to support the growth and development of Australia's regions. RDA committees build partnerships between governments, regional development organisations, local businesses, community groups and key regional stakeholders to provide strategic and targeted responses to economic, environmental and social issues affecting the regions of Australia.

The Memorandum of Understanding (MOU) between the Australian Federal and NSW State Governments was signed in March 2009 to lay the foundations for RDA committees in NSW. It states that each RDA will:

- Provide advice to government about regional issues;
- Provide strategic input into National and State programs;
- Provide information to regional communities and local government on National and State government initiatives;
- Help to co-ordinate regional planning and regional development initiatives; and
- Work closely with local governments and other regional organisations.

RDA is delivered through a national network of 55 committees with a national RDA Charter which sets out the areas of focus for the RDA network.

### RDA NSW Central Coast

RDA NSW Central Coast (RDACC) commenced operation on 1 July 2009 and operates within the Central Coast region, comprising of the local government areas of Wyong Shire and Gosford City.

RDACC is provided with operational funding via funding agreements with both the Australian Federal Government (through the Department of Infrastructure and Regional Development) and NSW State Governments (through NSW Trade & Investment). The Board of RDACC is appointed by agreement between the Federal and State Governments and is made up of twelve regional representatives from a variety of backgrounds.

### Key Focus of RDA

A key focus of Regional Development Australia committees is on the economic, social and environmental issues affecting communities. In this respect, the RDA National Charter sets out that all RDA committees will be an important contributor to and driver of:

- Regional business growth plans and strategies, which will help support economic development, the creation of new jobs, skills development and business investment;
- Environmental solutions, which will support ongoing sustainability and the management of climate change (including the impact of drought, flood or bushfires), and
- Social inclusion strategies, which will bring together and support all members of the community.

Through our activities, RDA Central Coast NSW will support, promote and disseminate information on government policy initiatives for the benefit of local communities. To this end, Regional Development Australia committees and Chairs will have a strong understanding of Federal, State and Local Government policies and initiatives, and the ways in which local communities can engage with them. Regional Development Australia will take a leadership role in bringing together organisations to take advantage of government programs, policies and initiatives.

Regional Development Australia will be an effective conduit between governments and regional communities. It will enable all communities to provide input to governments about the strengths and weaknesses of regional Australia.

A significant component of providing that 'link' between government and community is through the development of regional strategies, providing a consolidated 'voice' for the region – setting key priorities and targets, and setting an appropriate path for the prosperity of the Central Coast.

## Government Priorities

### Federal Government Priorities

The 2015-2016 Federal Budget delivered the Building Stronger Regional Communities initiative which is focussed on boosting the nation's enabling infrastructure. The major focus is:

Promoting economic development through the \$1 billion National Stronger Regions. The Fund will invest in small-scale infrastructure projects at a local level and will create economic development opportunities for people living in regions.

The establishment of the \$300 million Community Development Grants Programme to support needed infrastructure that promotes stable, secure and viable local and regional economies.

Supporting key infrastructure that strengthens local and regional economies through the \$45 million Stronger Community Program.

In addition, the Federal Government proposes to make significant investments in infrastructure including:

From 2014-15 to 2018-19 the Government will provide \$3.2 billion under the Roads to Recovery programme, to be distributed to Australia's local councils, state and territory Governments responsible for local roads in the unincorporated areas. This will directly assist local councils to undertake essential, locally chosen road works.

Improving mobile coverage in regional, remote and outer metropolitan areas through the Mobile Black Spot Program. The Program will improve coverage along major transport routes, in small communities and in locations prone to natural disasters.

Committing \$500 million to the Black Spot Programme from 2014-15 to 2018-19, which includes an additional \$200 million over two years from 2015-16 under the Infrastructure Growth Package to improve road safety across the nation.

### NSW State Government Priorities

The 2015-16 NSW State Budget provides an indication as to the broad priorities for the NSW State Government. In reviewing the budget papers, it is noted that there is a significant focus on housing, planning and infrastructure with a focus on these areas as the source for future economic growth.

With Legislation allowing the partial lease of the New South Wales' electricity network recently being passed through the NSW Parliament, an estimated six billion dollars will be quarantined under legislation to assist in funding enabling infrastructure projects in regional NSW.

In addition to the NSW State Budget, the NSW Government issued the 'NSW 2021: A Plan to Make NSW Number One' Strategy in 2012 and a specific Central Coast Regional Action Plan (NSW Department of Premier and Cabinet, Dec 2012), which lists a number of key objectives.

1. Grow the economy of the Central Coast and provide sustainable employment including:
  - Partnering with local stakeholders to encourage economic growth.
  - Supporting key regional industries and local businesses to grow.
  - Supporting increased productivity by cutting government red tape.

- Revitalising key centres of Gosford City and Wyong Shire.
  - Delivering effective regional planning to cater for growth and encourage increased investment.
  - Promoting the Central Coast as a choice for tourism/events.
2. Enhance skills development and educational outcomes:
    - Engage young people in education and help their transition to further education.
    - Partner with business, schools, TAFE, training organisations and universities to develop quality.
    - Develop training options linked to employment opportunities.
    - Foster additional educational facilities and encourage more students to undertake further education in courses that cater to future workforce needs.
  3. Improve transport connectivity and regional roads:
    - Improve the regional road network to address traffic hotspots and increase linkages.
    - Improve the region's external connections.
    - Improve movement of rail freight through the region.
    - Improve public transport connectivity across the Central Coast, making public transport a more attractive option.
  4. Deliver coordinated support for the community, families and in particular, our disadvantaged and vulnerable members:
    - Improve community safety.
    - Support families and disadvantaged and vulnerable members of our community.
    - Reduce homelessness and improve access to affordable housing.
  5. Improve access to health services and promote healthy lifestyles:
    - Improve access to quality health services.
    - Promote healthy lifestyles.
  6. Protect our natural environment and achieve balanced outcomes between development and conservation:
    - Ensure that planning support and land use support sustainable economic growth and environmental protection.
    - Manage and protect the Central Coast's water catchment areas.

(Note: the Regional Strategy is scheduled for review during 2014-15, to be replaced by a 'Regional Growth Plan' and accompanying 'Regional Infrastructure Plan'.)

### Local Government Priorities

The Wyong Shire Council '*Economic Development Strategy 2014*' and the Gosford City Council '*2025 Community Strategic Plan*' set out the priority areas of the respective Council's within the Central Coast region.

### Wyong Shire Council Strategic Priorities

The Wyong Shire Council '*Economic Development Strategy 2014*' (Wyong Shire Council, 2014) is the framework for the sustainable economic growth of the Wyong Shire area for the next 25 years. The Plan states that 'Over the next 25 years, we will take steps to direct the regional economy toward a more diversified and sustainable economic base.'

The priority areas aim to create a future Wyong Shire where there will be:

Greater stability for the local economy via a broader industry / investment base.

Build investor confidence ensuring the area is geared to respond to wider market demand.

Create local employment opportunities and attract / retain the talent and skills to fill the workforce demands of this new economy.

Achieve sustainability for the region's economy, community, environment and lifestyle.

The Wyong Shire Council Economic Development Strategy 2014 identifies six key areas to transition to a new economy with Short Term Priority Actions to be achieved over the next 5 years.

## **1. Leadership and Collaboration**

- 1.1. Continue to support the REDES to ensure that key economic strategies are achieved;
- 1.2. Maintain support of key business development groups such as chambers of commerce, town centre management and tourism industry associations;
- 1.3. Work to cut red tape and make it easier for target businesses and investors to do business here – provide high quality advice and client management services;
- 1.4. Identify and mentor potential business and community leaders. Investigate establishment of specific industry groups such as a Young Entrepreneurs Group or Innovation Group;
- 1.5. Continue to partner with industry and government to deliver on the shared vision of the economy.

## **2. Market a Strong, Competitive Identity**

- 2.1. Develop a new place brand and program to market the area's unique attributes to key target business and investment sectors;
- 2.2. Adopt a targeted approach to promote the region's competitive advantages to priority markets and potential investors;
- 2.3. Develop a five year Wyong Shire Economic Development Marketing Plan;
- 2.4. Establish a Wyong Shire ambassador program and gain the support of business leaders and local identities to promote the region;
- 2.5. Through a targeted sponsorship, collaboratively establish and promote key events, such as a new Lakes Festival, to raise local profiles and encourage visitation and business relocation;
- 2.6. Work with Regional Development Australia Central Coast and the Marketing Strategy Implementation Group (SIG) to market the region for business.

## **3. Capital Investments**

- 3.1. Establish the Wyong Education & Business Precinct at Warnervale - complete a masterplan and attract investors;
- 3.2. Central Coast Regional Airport - complete the planning, studies and engagement required and seek investment to establish this key air transport and freight hub;
- 3.3. The Art House – development to start in 2014;
- 3.4. Support development of various iconic development sites through the Shire;
- 3.5. Establish the new Warnervale North Rail Station and retain Warnervale South Rail Station;
- 3.6. Establish a Community Hub in the north of the Shire.

## **4. High Value Industries**

- 4.1. Attracting and developing high-value industries including:
  - 4.1.1. Education
  - 4.1.2. Aged Care

- 4.1.3. Health & Well Being
- 4.1.4. Tourism
- 4.1.5. Aviation
- 4.1.6. Professional & Skilled Employment
- 4.1.7. Logistics & Warehousing
- 4.1.8. Manufacturing
- 4.1.9. Agriculture & Food Processing

## **5. Global Connections**

- 5.1. Establish international relationships and stronger commercial links that will assist local business, leverage new business, and secure public and private investment;
- 5.2. Develop an annual program of export missions– led by Wyong Council – to grow awareness of the region's products and services and investment opportunities;
- 5.3. Provide easy access to up-to-date information on the strengths and competitiveness of Wyong Shire for trade and commerce;
- 5.4. Actively promote the economic opportunities of the Shire at both local and international trade conferences and conventions.

## **6. Investing in Talent and Skills**

- 6.1. Retain and grow a skilled workforce to support the growth of key industry sectors;
- 6.2. Undertake analysis of workforce requirements for each major growth industry to identify gaps and develop targeted solutions;
- 6.3. Develop opportunities for identified growth sectors to be established within the Shire;
- 6.4. Establish local jobs to minimise the large number of residents commuting to work outside the Shire;
- 6.5. Council to work in conjunction with Government, education providers and local businesses to support education facilities, increase high school retention rates and levels of people holding tertiary qualifications in the workforce;
- 6.6. Enter partnerships and programs with government agencies to encourage training facilities to provide courses for upskilling to assist with the identified growth sectors;
- 6.7. Support the development of programs that strengthen opportunities for young people to access training and skills development, such as National Food Industry Innovation Precinct, Aged Care Workforce Innovation Precinct and Innovation Cluster Groups related to Music, Creative Industries, Teleworking, Manufacturing and Food;
- 6.8. Establish a taskforce to oversee the development of the Wyong Education and Business Precinct at Warnervale.

## Gosford City Council Strategic Priorities

The priority areas under the Gosford '2025 Community Strategic Plan' (Gosford City Council, 2013) are grouped into four (4) areas, each with a number of key objectives:

1. **Society & Culture** – Our community is a safe place; Our local history, culture and diversity is valued and celebrated; Everyone has fair access and opportunity to participate in community life; Our built environment is a desirable place to be; Our health and wellbeing provide for a satisfying and productive life.
2. **Environment** – Diversity of the natural environment is protected and supported; Opportunities exist to access and experience natural areas; We use resources responsibly; We live in an environment where pollution is minimised; Benefits of the natural environment are understood and valued; Land use and development protects the value and benefits provided by the natural environment.
3. **Economy** – Gosford is a place that attracts people to work, live and visit; Gosford attracts and supports new and existing businesses and investment; Gosford City Centre thrives as the regional hub; We have appropriate skills and knowledge; There are good links between our homes, places of work, services and facilities.
4. **Governance & Leadership** - decision making processes are open and transparent; We collaborate to achieve outcomes; We are engaged and well informed; Our infrastructure is well managed and maintained; Our leaders make decisions.

The key activities of Gosford Council in meeting their aims and objectives are set out in a 4 year 'Delivery Plan' which sets specific strategies, measures of progress, and identifies other contributors who have a role to play in ensuring that Gosford City achieves its potential.

## The Purpose of this Regional Plan

This document aims to draw together the strategic priorities of the various government and non-government bodies working across the Central Coast, and to ensure that the needs of the region are being articulated appropriately and that those identified needs are being addressed by way of investment and local action.

The primary purpose of this Plan is to present a consolidated '*snap-shot*' of the NSW Central Coast region - to set out the strengths and opportunities for the region as well as challenges, issues and priorities.

## Bringing it all Together – The Regional Strategic Context

The content is strongly aligned to other regional strategic documents from across the Central Coast, and remains consistent with Federal, State, regional and local government strategies. This includes the policies and strategic priorities set out in:

Regional Economic Development & Employment Strategy (REDES) (Buchan Consulting, 2009).

The Regional Development Australia Central Coast Business Plan (RDACC, 2014).

NSW 2021 (NSW Government, 2012).

Central Coast Regional Action Plan (NSW Department of Premier and Cabinet, Dec 2012).

The Central Coast Regional Strategy (Department of Planning & Environment, 2014) (Note: the Regional Strategy is scheduled for review during 2014-15, to be replaced by a Regional Growth and Infrastructure Plan).

The Central Coast Tourism Destination Management Plan (Central Coast Tourism, 2014).

Central Coast Tourism Opportunity Plan (Central Coast Tourism, April 2013).

Wyong Shire Community Strategic Plan 2030 (Wyong Shire Council, April 2013).

Wyong Shire Council Strategic Plan 2014-18 (Wyong Shire Council, 2014).

Wyong Shire Economic Development Strategy 2014 – 2039 (Wyong Shire Council, 2014).

Gosford 2025 Community Strategic Plan (Gosford City Council, 2013).

Gosford City Council's Delivery Program 2013/14 - 2016/17 & Operational Plan (Gosford City Council, 2013).

Gosford City Centre Masterplan (Gosford City Council, 2010).

Central Coast Regional Transport Plan 2013 (NSW Department of Transport, Dec 2013).

Each of these strategic documents and plans form 'part' of the overall picture of the strategic needs, desires and challenges of the Central Coast. There are also a large number of documents which provide economic evaluation, demographic analysis and the like. It is the intention of this Regional Plan to draw on the information, strategies, consultation, discussion and processes that went into preparing those existing strategies/documents, and to distil the key issues for the region. This Regional Plan aims to 'bring together' the aspirations of the Central Coast so that it may be conveyed to Government in a coherent and cohesive manner.

It is in the context of this existing strategic direction, managed by a range of organisations/agencies across the Central Coast, that RDA Central Coast aims to provide the over-arching regional perspective and 'voice' for the issues, challenges and priorities for the region. The Regional Plan aims to bring together the key messages for government, representing a consolidated regional approach to the important issues of the Central Coast region.

## THE CENTRAL COAST REGIONAL ANALYSIS

### FIVE DETERMINANTS OF LONG-TERM REGIONAL ECONOMIC GROWTH

The Council of Australian Governments (COAG) Regional Australia Standing Council (RASC) has established national approaches to regional development in order to facilitate collaboration and coordination between different levels of government. RASC has agreed to five key determinants of long term regional economic growth:

- 1. Human Capital**, particularly education and skills  
*Human capital* is the stock of knowledge, expertise and abilities of a region.
- 2. Sustainable Communities (economic, environmental and social) and Population Growth** *Sustainable communities* refers to the ability of a region to endure in the long term. It has economic, environmental and social dimensions.  
*Population growth* refers to change in the size of a population over time, caused by migration and natural change through births and deaths.
- 3. Access to international, national and regional markets**  
This refers to the ability to trade goods and services in a given market.
- 4. Comparative advantage and business competitiveness**  
A region has a *comparative advantage* when it can produce a product, good or service at a lower opportunity cost than other regions.  
*Business competitiveness* is the ability of a business to sell and supply goods and services compared to a competitor. A business has a comparative advantage when its products or services cannot be easily duplicated by competitors
- 5. Effective cross-sectoral and intergovernmental partnerships** (including through place-based approaches) and integrated regional planning.

## Human Capital

Analysis of the Department of Employment Education, Skills and Jobs Regional Scan May 2013 (Department of Employment, May 2013 ) and community consultation has been used to develop the Central Coast Education, Skills and Jobs Regional Plan which has identified that the Central Coast has lower education levels than the State overall. This relates to school retention rates, participation in tertiary education and attainment levels.

**Table 1 - Strengths, Challenges, Needs & Opportunities in Education & Skills**

<b>Education and Skills</b>	
<b>Strengths</b>	<p>Region is well served with educational institutions including University of Newcastle, TAFE, private RTOs, schools, preschools and childcare.</p> <p>'Allen Report' into tertiary education provision on the NSW Central Coast indicates that there is a strong case for extension of further higher education provision in the Region with need for an additional 7,000 university student places.</p> <p>\$7 million of funding for Kibbleplex project in Gosford and \$2.7 million for the Central Coast Youth Skills Employment Centre within the Tuggerah Business Park. Digital Hubs in Gosford and Wyong LGAs awarded funding.</p> <p>A large percentage of persons with vocational qualifications (23.0% compared to 17.7% in NSW).</p> <p>The iTAFE.net Viral College is fully operational delivering all the qualifications with over 250 enrolled learners.</p>
<b>Challenges</b>	<p>Large percentage of the population aged 15 and over (45.6%) currently has no qualifications.</p> <p>Smaller percentage of persons with Bachelor or Higher degrees.</p> <p>25% of residents who attend university do not attend the University of Newcastle.</p>
<b>Needs</b>	<p>To build the capacity of the region's working age residents to obtain appropriate qualifications.</p> <p>Undertake analysis of workforce requirements for each major growth industry to identify gaps and develop targeted solutions.</p>
<b>Opportunities</b>	<p>Build on the success of the Education &amp; Future Skills Strategic Implementation Group established under the Regional Economic Development &amp; Employment Strategy (REDES).</p> <p>Collaborate with key stakeholders to address the issues in the Regional Education, Skills and Jobs Plan 2012 to engage young people in education to increase high school retention rates and help their transition to further education.</p> <p>Partner with business, schools, TAFE, training organisations and universities to develop quality education options.</p> <p>Develop vocational training options linked to employment opportunities in key industries by working with State Training Services Industry Network Committee to undertake a regional skills assessment in conjunction with NSW Industry Training Advisory Bodies and Industry Skills Councils.</p> <p>Foster additional educational facilities and encourage more students to undertake further education in courses that cater to future workforce needs.</p> <p>Participate in an industry reference group from the Community Services Sector to undertake an analysis of future workforce development needs and commence progress towards a regional Workforce Development Plan.</p> <p>Support the proposed university precinct in Gosford.</p> <p>Support the Wyong Shire Council's Economic Development Strategy to deliver a major Educational &amp; Business Precinct in partnership with universities, vocational training providers and the community to lift the educational offering of the region.</p>

## Sustainable Communities and Population Growth

### Economic

The Central Coast region has 151,673 residents employed in the year ending June 2013. Of those employed the Department of Transport estimates that relatively high proportions (25 per cent) of residents travel outside of the region for employment. Approximately 20 per cent of the region's workforce travels to Sydney, and 5 per cent to the Hunter region. This equates to approximately 38,000 Central Coast residents travelling outside the region for employment each day. Whilst the overall percentage is down from 35 per cent in 2000, this is still a significant issue for the region.

This level of out-commuting places a strain on the capacity of the region to compete, although it also provides a potential advantage, with a large number of highly qualified and experienced people already residing in the region (although accessing employment in Sydney) – there is potential to attract these people to work locally if appropriate industries/employment was available.

Industry on the Central Coast comprises mainly a small number of large firms, with the bulk of business in the small to micro category. Ninety per cent of businesses on the Central Coast have fewer than five employees.

Table 2 - Strengths, Challenges, Needs &amp; Opportunities in Job Creation &amp; Value Adding Industries

<b>Job Creation and Value Adding Industries</b>	
<b>Strengths</b>	<p>A high proportion of regional employment (48%) is in four industry sectors:</p> <ul style="list-style-type: none"> <li>○ Health Care and Social Assistance (13,687 FTEs or 15.9%)</li> <li>○ Retail Trade (10,832 FTEs or 12.6%)</li> <li>○ Construction (9,041 FTEs or 10.5%)</li> <li>○ Manufacturing (8,421 FTEs or 9.8%).</li> </ul> <p>The same four industry sectors contribute \$3682.6 million (40%) of the value added to the regional economy.</p> <p>The Central Coast has been identified as one of the first rollout locations for the National Broadband Network</p>
<b>Challenges</b>	<p>Compared with other regions, the Central Coast has a narrow jobs base that is highly reliant on population-related services (mainly health, retail, construction) and is under-represented in knowledge and business services (business services, professional services, technical services and finance).</p> <p>Improve the image of the region as a place for business and not just lifestyle.</p> <p>Out-commuting rates of 25% is an issue for the economy.</p>
<b>Needs</b>	<p>Marketing strategy to attract regional investment in businesses.</p> <p>Promotion of Economic ID data to help formulate economic development strategies, attracting investment, transport and land use planning.</p>
<b>Opportunities</b>	<p>Work with regional stakeholders to enhance regional job creation. The development and implementation of the NSW Central Coast Regional Economic Development and Employment Strategy (REDES) demonstrates the direct benefit of the unprecedented regional collaboration between the three levels of government, business and the education sector.</p> <p>There is the potential to attract those who currently commute outside the Central Coast to work locally if appropriate industries/employment is made available.</p> <p>Support the establishment of a Federal Government ATO office in Gosford.</p> <p>Increasing the number of workers making use of teleworking to reduce the rate of out-commuting.</p> <p>Development of an inward investment website (investcentralcoast), the management of enquiry processes and to establish (and implement) a marketing strategy to promote the region, using the website as a basis.</p> <p>Enable access to and training in the use of economic modelling data to each LGA and the region as a whole to be able to quantify and describe our local economy and the role it performs in employment and wealth creation.</p> <p>Support the Regional Sponsored Migration Scheme (RSMS).</p> <p>RDA Central Coast will continue to support the implementation of the Central Coast Teleworking Strategy and the development of Smart Work Hubs, as well as managing the delivery of the 'Digital Enterprise' program to business. In addition, RDA Central Coast will continue to coordinate the Central Coast Broadband Implementation Group to guide the development of digital industries and ensure that the NBN network is leveraged for business growth.</p> <p>Provide ongoing support for Innovation Programs with RDA Central Coast continuing to partner with Innov8Central to implement the Central Coast Innovation Plan.</p>

## Environmental

The geography of the region is characterised by extensive lakes and waterway systems, along with coastal beaches and mountain forest areas. The natural environment of the Central Coast is unique and diverse, including extensive coastal and marine environments, providing for distinct lifestyle and promotional advantages, but also creating key issues of environmental management and sustainability.

Developing a safe and secure water supply without compromising the health of the Region's water sources is one of the greatest challenges that the Region faces. These changes mean that a range of options need to be considered to develop a more secure water supply system and that future growth must be carefully managed.

**Table 3 - Strengths, Challenges, Needs & Opportunities in Environmental Factors**

<b>Environmental Factors</b>	
<b>Strengths</b>	<p>The Central Coast has 81km of ocean coastline.</p> <p>More than half the Region is comprised of National Parks, State Forests, Open Space, Conservation areas and aquatic systems.</p>
<b>Challenges</b>	<p>Providing a sustainable long term water supply for residential, employment and environmental purposes while protecting water catchment areas from inappropriate development.</p> <p>Managing population growth in relation to the capacity of water supply.</p> <p>Managing stormwater to protect downstream receiving environments and identifying opportunities for sustainable use of this valuable resource.</p> <p>Allowing for development and redevelopment while protecting significant cultural heritage.</p> <p>Managing natural hazards in new developments, including flooding, coastal erosion and inundation (including the impacts of climate change), land instability, bushfire and acid sulphate soils.</p>
<b>Needs</b>	<p>Investigating alternative water sources that are sustainable in the longer term.</p> <p>Funding for development of sustainable water infrastructure.</p>
<b>Opportunities</b>	<p>Providing a balance between future development and important conservation values.</p> <p>Supporting the use of rural lands as food-producing lands and ensuring the long term protection of these assets.</p> <p>Provide input into the Department of Planning Regional Growth and Infrastructure Plan (draft due end of 2014 with discussion paper due in Sept 2014).</p> <p>Market the regional environment as a tourist, business and lifestyle location.</p> <p>Support sustainable communities and population growth via the Regional Economic Development &amp; Employment Strategy (REDES) Centre Development Group.</p> <p>Support the Mangrove Creek Dam Probable Maximum Flood Upgrade.</p> <p>Support for Mardi Water Treatment Plant - Natural Organic Material Removal.</p> <p>Development of the Unserviced Development Areas – Sewer, Gosford LGA.</p>

### Social Demographics and Health & Aging

The Central Coast has a relatively homogeneous population with only 5.2% coming from a non-English speaking background compared with 18.6% in NSW. In the 2011 Census 2.9% of the Central Coast Population identified as Aboriginal or Torres Strait Islander which is only slightly higher than the NSW rate of 2.5%. (Australian Bureau of Statistics, 2011)

An analysis of the jobs held by the full-time equivalent workforce in Central Coast NSW in 2012/13 shows the largest industry was Health Care and Social Assistance with 13,687 FTE jobs or 15.9% of employment.

The largest changes in the jobs held by the full-time equivalent workforce between 2007/08 and 2012/13 in Central Coast NSW were also for those employed in Health Care and Social Assistance with an additional 2,504 FTE jobs.

Analysis of the five year age groups of Central Coast NSW in 2011 compared to New South Wales shows that there was a similar proportion of people in the younger age groups (under 15) and a higher proportion of people in the older age groups (65+). Given the aging of the population across the Central Coast, and the popularity of the region for retirement living, it is anticipated that the health, aged care and social assistance sectors will have significant growth in coming years/decades.

**Table 4 - Strengths, Challenges, Needs & Opportunities in Health & Aging Services**

<b>Access and demand for Health and Aging Services</b>	
<b>Strengths</b>	<ul style="list-style-type: none"> <li>Construction of Wyong Hospital Emergency Department Upgrade - \$6.2m.</li> <li>Construction of Gosford Hospital Emergency Department - \$5.8m.</li> <li>260 research projects currently being undertaken by CCLHS.</li> <li>Dual pattern of population growth, with older persons being attracted for retirement living and families attracted to the region by affordable housing.</li> </ul>
<b>Challenges</b>	<ul style="list-style-type: none"> <li>The largest changes in age structure between 2006 and 2011 were in the age groups 50 – 75 with an increase of 10,793 people.</li> <li>Greater demand for travel for healthcare, medical and recreation reasons as the population ages.</li> <li>Need for more specialised transport services to cater for limited mobility.</li> </ul>
<b>Needs</b>	<ul style="list-style-type: none"> <li>Review initiatives for the Aged Care Workforce Innovation Network Regional Grant.</li> <li>Participate in an industry reference group from the Community Services Sector to undertake an analysis of future workforce development needs and commence progress towards a regional Workforce Development Plan.</li> </ul>
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>To work with training and professional organisations across the Central Coast where there are known workforce development needs - particularly focus on health/community service sectors.</li> <li>To attract self-funded retirees to retire to the Central Coast. Provide opportunities for their families to also move to the Central Coast.</li> <li>To promote the Central Coast as a region of excellence for Aged Care.</li> <li>Continue to participate in Aged Care WIN Reference Group as a conduit between the region and WIN facilitator.</li> <li>Support the development of infrastructure priorities list to attract funding opportunities to respond to changing transport needs as the population ages.</li> <li>Provide eHealth services with the High Speed Broadband Rollout.</li> </ul>

### Population Growth

The population of the region is in the order of 328,000, with an annual growth rate of approximately 2,700 people (approx. 0.83%). (Australian Bureau of Statistics, 2011). Population growth has slowed in the past four years from a high of 1.9% growth in 2008 to a current population growth rate of 0.86%.

In accordance with the Central Coast Regional Strategy 2006-2031 (Department of Planning & Environment, 2014), the region is anticipated to have a population of approximately 386,900 people by 2031, and it will require the construction of around 36,800 new residences to accommodate this growth. In addition, the Strategy indicates that additional commercial, industrial and retail space will be required to provide approximately 30,750 additional jobs over the next 20 years.

The Region's waterways, topography and conservation areas, along with important resource lands, limit the expansion of the urban footprint. This means that future growth will largely be contained within existing settlement areas, apart from nominated greenfield areas.

**Table 5 - Strengths, Challenges, Needs & Opportunities in Population Growth**

<b>Population Growth &amp; Urban Growth Pressure</b>	
<b>Strengths</b>	<p>The population of the region is in the order of 328,000, with an annual growth rate of approximately 2,700 people (approx. 0.86%).</p> <p>The Central Coast has experienced a dual pattern of population growth. This pattern has produced growth at both ends of the age spectrum (mature-aged persons and families with school-aged children).</p> <p>Establishment of the Warnervale Town Centre and associated residential land release and infrastructure upgrades.</p>
<b>Challenges</b>	<p>Population growth has slowed in the past four years from a high of 1.9% growth in 2008 to a current population growth rate of 0.86%.</p> <p>Generally 'greenfield' sites for new housing are only available in the Wyong Shire, with growth in housing in Gosford almost exclusively obtained with infill development with some minor greenfield sites on the edge of existing urban areas.</p>
<b>Needs</b>	<p>Analysis of economic modelling data for each LGA and the region as a whole.</p> <p>Development of a Regional Marketing Plan to promote the region as a business location.</p>
<b>Opportunities</b>	<p>Work within the provisions of the Regional Economic Development &amp; Employment Strategy (REDES) to accelerate population growth and jobs creation, by harnessing ideas and collaborating on issues and challenges to provide a strong regional voice.</p> <p>Work with three levels of government and local stakeholders to encourage population growth and business development. Support the development of high-value industries.</p> <p>Adopt a targeted approach to the region's competitive advantages to priority markets and potential investors.</p> <p>Provide input into the Department of Planning Regional Growth and Infrastructure Plan (draft due end of 2014 with discussion paper due in Sept 2014).</p> <p>Provide support for the Warnervale Town Centre and associated residential land release and infrastructure upgrades.</p> <p>Provide support for the Central Coast Tourism Opportunities Plan which outlines the Top 10 proposed regional tourism infrastructure projects, including a motorsport park and the Chinese Australian Cultural Village.</p> <p>Regional data set to be hosted on 'investcentralcoast' website.</p> <p>Increasing the number of workers making use of teleworking with the High Speed Broadband Rollout to reduce out-commuting.</p>

## Access to international, national and regional markets

### Proximity to Sydney & Newcastle

The Central Coast has significant advantage in relation to its location, strategically situated between the urban centres of Sydney and the Newcastle/Hunter Valley with a population of 5 million within 2 hours drive. This provides businesses the capacity to access these markets, especially the professional markets within the Sydney and Newcastle metropolitan areas along with the industries associated with the Hunter Valley mining and agricultural sectors. Proximity to these centres also provides for access to international airports, shipping facilities and the like which aids in connectivity to international markets.

This proximity is further enhanced by good inter-regional transport connectivity. The Central Coast region is connected in the south to Sydney (Canberra and Melbourne) as well as north to Newcastle (the NSW Mid-North Coast and Brisbane) by the M1 Motorway. In addition, the northern rail corridor provides movement for freight and passengers. Travelling time to the Sydney CBD, Parramatta, Chatswood and Newcastle/Hunter is around 60 minutes.

The location of the region provides access to finished goods and raw materials along east coast transport corridor, as well as access to the labour force between Sydney and Newcastle. The region already makes use of this connectivity and a number of exporters (including manufacturing, education and service industries) export to regions as diverse as Asia (China, Malaysia) the Pacific (New Zealand) as well as the Middle East and America.

### Export Industries

An analysis of the total exports by industry sectors in Central Coast NSW in 2012/13 shows the three largest industries were:

- Manufacturing (\$1,810 million or 48.1%)
- Health Care and Social Assistance (\$478 million or 12.7%)
- Administrative and Support Services (\$379 million or 10.1%)

In combination these three industries accounted for \$2,667 million in total or 70.9% of the total exports by total industry in Central Coast NSW.

### Regional Infrastructure

#### **Regional Airport**

There is potential to increase the regional connectivity through increased regional air capacity. There is an existing airport located at Warnervale, although the operations are constrained by operational, ecological and other issues. Wyong Council is currently investigating the option of establishing a new 'regional airport' in the Warnervale area, which has the potential to provide significant improvements in regional, national and international connectivity and will provide the Central Coast with a significant economic advantage.

#### **Connectedness & Transport**

There is a lack of internal connectedness due to public transport access issues and the location of jobs and population centres. The Central Coast has traditionally developed as a series of dispersed towns/centres which creates difficulties in provision of transport infrastructure (including public transport). The Central Coast remains a car-dependent region and the entrenched areas of socio-economic disadvantage and high unemployment generally coincide with areas which lack ease of access to transport infrastructure.

## Warehousing, Logistics & Freight

The strategic location of the Central Coast between Sydney and Newcastle, excellent transport links, available land and motivated workforce have made it a desired place for warehouse, logistics and distribution activities. Alliance Distribution Services, Toll and Woolworths have established distribution and logistics centres within the region.

**Table 6 - Strengths, Challenges, Needs & Opportunities in Regional Infrastructure**

<b>Regional Infrastructure &amp; Access to International, National and Regional Markets</b>	
<b>Strengths</b>	<p>Strategic location of the Central Coast between Sydney and Newcastle means it is within 2 hours of 5 million people.</p> <p>Regional collaboration to Development of 'Regional Infrastructure Priorities List'</p> <p>Current construction of</p> <p>West Gosford Interchange - \$170m</p> <ul style="list-style-type: none"> <li>○ Rail Passing Loops between Gosford and Narara - \$93m</li> <li>○ Sparkes Road Intersection at Warnervale - \$30m</li> <li>○ Terrigal Drive and Charles Kay Dr Intersection at Terrigal - \$23m</li> <li>○ Central Coast Highway &amp; York St Intersection at Point Fredrick - \$6.5m</li> <li>○ New Woolworths Ltd. distribution centre at Warnervale – \$100m</li> </ul>
<b>Challenges</b>	<p>Remains a car-dependent region</p> <p>Lack of internal connectedness due to public transport access issues</p>
<b>Needs</b>	<p>Preparation of facts sheets for each item on the 'Regional Infrastructure Priorities List'</p> <p>Implementation of a targeted Advocacy / Communication programme for the 'Regional Infrastructure Priorities List'.</p>
<b>Opportunities</b>	<p>Proactively advocate through community consultation and communication with the media, the benefits, project status and government commitment to centres and infrastructure development within the region.</p> <p>Establishment of a Regional Infrastructure Fund to allow for construction of Regional Infrastructure Priorities List.</p> <p>Support the redevelopment of Gosford Waterfront &amp; CBD.</p> <p>Support the development of a Central Coast Regional airport.</p> <p>Support the development of the Warnervale Town Centre Railway Station.</p> <p>Support the development of various iconic development sites throughout the Region.</p> <p>Support the 'Enabling Taskforce' initiative developed under the provisions of the Regional Economic Development &amp; Employment Strategy (REDES).</p>

## Regional Arts, Creative and Sporting Industries

Table 7 - Strengths, Challenges, Needs & Opportunities in Regional Arts, Creative and Sporting industries

Regional Arts, Creative and Sporting industries	
<b>Strengths</b>	<p>The Central Coast region currently is home to a diverse and proactive creative and sporting sector.</p> <p>The Wyong Shire Council will commence development of The Art House with construction due to start in October 2014 and expected to finish in December 2015.</p>
<b>Challenges</b>	Lack of funding for infrastructure.
<b>Needs</b>	Large scale cultural and sporting infrastructure is required due to the growing population.
<b>Opportunities</b>	<p>RDA will continue to deliver the \$460,000 regional arts initiative (funded by Arts NSW and undertaken in conjunction with local councils in the region).</p> <p>Support the establishment of a new Regional Performing Arts Centre and Conservatorium in Gosford.</p> <p>Provide support for the Central Coast Regional Sporting &amp; Recreational Complex, Tuggerah.</p> <p>Provide support for the art industry by creating a platform through which arts industries in the Central Coast region can be guided by the direct participation of the three tiers of government.</p> <p>Support the development of the Chinese Cultural Theme Park.</p>

## REGIONAL PRIORITIES

RDA Central Coast has developed six key priorities and associated activities to address these issues:

### **Creating Long Term Sustainable Economic Growth and Job Creation**

RDA Central Coast believes that the provision of job-enabling infrastructure is a priority issue for the region. In 2014, RDA Central Coast will lead the development of a 'Regional Infrastructure Priorities List', which will clearly articulate the job-enabling infrastructure required for the region.

The promotion of Centres Development across the Central Coast will also be a key activity throughout 2014-15. The redevelopment/regeneration of Gosford CBD (the 'Regional City' of the Central Coast) has long been a key objective of a range of organisations across the region, as is the need to promote continued progress on the Warnervale Town Centre. In addition, there are a range of Centres Development activities across the region, which have the potential for significant benefits to the community and provide the basis for increasing local employment and service provision. RDA Central Coast will have a key role in advocating for Centres Development and the regeneration of existing centres.

RDA Central Coast will aim to undertake a range of projects linked to key areas of workforce development, particularly focussed on the community services and health sectors, where there is already an identified need for improved qualifications and additional staff.

### **Improve Skills Development and Educational Outcomes**

RDA Central Coast recognises that there is a need to greatly improve education levels within the region to reduce unemployment, grow the economy and to become a world class 'learning region'. In 2014, RDA Central Coast will work with the Regional Economic Development & Employment Strategy (REDES) Future Skills Strategic Implementation Group to support Gosford and Wyong Councils in establishing pathways for the Central Coast community to take up tertiary education. This will create new regionally significant educational opportunities and develop new educational and learning infrastructure for the Central Coast community.

We will continue to develop projects that link training and education to workplace outcomes to ensure skills development suitable to emerging industry needs across the region. We will continue work with our partners (including The University of Newcastle, Hunter Central Coast TAFE) as they seek to grow their presence in the region.

### **Enhanced Regional Collaboration and Capacity Building within the Region**

RDA Central Coast will maintain its key role in promoting discussion and discourse between all levels of government, business and the community on the Central Coast. We will continue to hold 'Focus on the Coast' events, dealing with key issues of significance for the region, and we will involve ourselves in community forums, regional round tables, networking events and the like.

We will continue to support all our partners in establishing and maintaining a strong policy/strategic framework, which provides the basis for future growth and prosperity of the region.

### **Embracing the Digital Economy**

The early rollout of the NBN provides the Central Coast with a significant advantage to leverage opportunities ahead of many other regions. RDA Central Coast will aim to ensure that the region obtains maximum benefit from the early NBN rollout and will undertake appropriate activities to continue to advocate for the emerging digital economy.

RDA Central Coast will continue to support the implementation of the Central Coast Teleworking Strategy and the development of Smart Work Hubs, as well as managing the delivery of the 'Digital Enterprise' program to business. In addition, RDA Central Coast will continue to coordinate the Central Coast Broadband Implementation Group to guide the development of digital industries and ensure that the NBN network is leveraged for business growth.

## Regional Innovation

RDA Central Coast will continue to partner with Innov8Central to implement the Central Coast Innovation Plan. The Innovation Plan was developed by regional stakeholders with the core aim to improve the quality of life for Central Coast residents by improving the quality of the regional economy.

RDA Central Coast will assist Innov8Central to deliver the Regional Innovation Summit and its four key programs:

1. The Innovation Champions Program—educating regional businesses and stakeholder representatives to be more innovative. To date, 30 participants have completed the full program and 30 participants have completed the one-day workshop.
2. The Cluster Program—contributing to the development of regional clusters including manufacturing, telework, music, social enterprise and food. Music and manufacturing in particular have gained independence as clusters by having their own boards, websites, events, business plans and strategies.
3. The Gazelle Network—this has not yet commenced but will be aimed at supporting high growth regional businesses.
4. The Monitoring Program—a program of qualitative and quantitative research, including a representative region-wide telephone survey of 300 businesses and qualitative, case-study interviews.

## Marketing the Central Coast Region

Throughout 2015-16, there will be a continued focus on improving the image of the region and marketing the Central Coast as a place for business investment and lifestyle.

We will partner with all levels of government, business and the greater community to develop a united regional marketing effort, and we will support events and activities that portray the positive attributes of the region. This includes working with partners to create and secure conferences, events and activities that highlight the best qualities of the Central Coast.

## RDA PROJECTS, ACTIVITIES & INITIATIVES

The NSW Central Coast is faced by a number of key regional challenges; these challenges are set out below, in addition to the proposed actions to be undertaken towards unlocking these issues over the next 2 years. These actions represent the priorities for RDA Central Coast, and are targeted around the broad objectives for RDA Central Coast.

Note: Many of the priorities and actions which are consolidated under this plan are included in other specific strategic planning documents from across the Region – this includes the Regional Economic Development & Employment Strategy (REDES).

### Regional Economic Development & Employment Strategy (REDES)

**Objective:** To provide implementation leadership for the Regional Economic Development & Employment Strategy (and its associated 18 month Action Plan). Review the monitoring and reporting structures in conjunction with partners.

**RDA Outcome Area:** Whole of Government Approach, Improved Regional Planning and Improved Community and Economic Development.

#### Activities:

Undertake independent review of REDES to ensure alignment with Commonwealth, state and local government priorities, actions and strategies. Also review REDES governance and administration to ensure stakeholder satisfaction and effectiveness.

Recruit for vacant REDES Project Manager Position.

Implement REDES review recommendations.

Creation of new Central Coast jobs from REDES outcomes.

### Development of a Central Infrastructure Priority List

**Objective:** To collaboratively work across all levels of government, business and the community to develop a list of the key infrastructure priorities for the Central Coast that will grow investment and employment within the region.

**RDA Outcome Area:** Improved Community and Economic Development

#### Activities:

Facilitate government, business and community stakeholder meeting to gain consensus on the top infrastructure priorities for the Central Coast region.

Development of infrastructure priorities list and project fact sheet information.

Draft infrastructure priorities list and fact sheet information developed into PDF, web and print versions.

Communication/Advocacy Strategy produced for the infrastructure priority list.

REDES Executive (Minister for the Central Coast, Chair RDA Central Coast, General Manager Wyong Shire Council and Chief Executive Gosford City Council) endorses the Regional Infrastructure Priority List and the Communication/Advocacy Plan.

Regional Infrastructure Priority List and the Communication/Advocacy Plan is utilised to inform local community and media, guide strategic planning and attract funding opportunities.

## Provision of Regional Statistics, Data and Information

**Objective:** To work with regional partners to enable access to economic modelling data to each LGA and the region as a whole to be able to quantify and describe our local economy and the role it performs in employment and wealth creation. This data is necessary for developing economic development strategies, attracting investment, transport and land use planning.

**RDA Outcome Area:** Improved Community and Economic Development

### Activities:

Finalise arrangements with key stakeholders (Gosford City and Wyong Shire Council) with a view to partnering to secure appropriate regional data/statistics.

Deliver workshop to regional stakeholder group to ensure that local community fully utilise data.

RDA Central Coast to launch Central Coast regional data set.

Data and statistics made available through web-portal or other suitable arrangement for use across the region. Regional data set to be hosted on 'investcentralcoast' website with local government area data hosted on the website of each Council.

RDA Central Coast to coordinate and deliver regional road show/site demonstrations of data to major Central Coast stakeholders.

Commence discussions with other partners (such as Newcastle Innovation, University of Newcastle, Innov8Central etc) in relation to establishing a program of region-specific research projects.

## Regional Sponsored Migration Scheme (RSMS)

**Objective:** Accurately process all RSMS applications in statutory timeframes. To remain up-to-date on all RSMS correspondence, Immigration Department policy and training.

**RDA Outcome Area:** Enhanced Community and Economic Development

### Activities:

Process all applications (ongoing).

Attend appropriate training offered by DIAC.

## Regional Workforce Development – Health and Community Sectors

**Objective:** To work with training and professional organisations across the Central Coast where there are known workforce development needs - particularly focus on health/community service sectors.

**RDA Outcome Area:** Improved Regional Planning and Improved Community and Economic Development

### Activities:

Continue to participate in Aged Care WIN Reference Group as a conduit between the region and WIN facilitator.

Participate in an industry reference group from the Community Services Sector to undertake an analysis of future workforce development needs and commence progress towards a regional Workforce Development Plan. The Industry Skills Council has agreed to help facilitate this process.

Review regional strategy/plan to cater for Workforce Development Needs across the community sector.

Maintain position on the Building Australia's Future Workforce Committee for the Central Coast BAFW.

## Education and Future Skills

**Objective:** To build on the success of the Education & Future Skills Strategic Implementation Group established under the Regional Economic Development & Employment Strategy (REDES). To promote a learning culture in the region, to foster community awareness and to increase the take-up of education and training.

**RDA Outcome Area:** Improved Regional Planning and Improved Community and Economic Development

### Activities:

Review Try-A-Skill 2014 event held at TAFE Central Coast.

Maintain RDA Central Coast presence on the University of Newcastle Ourimbah Campus 'University Foundation'.

Maintain RDA Central Coast presence on the State Training Services Industry Network Committee. (Informs and manages programs and services which address the State's future skills needs.)

Maintain RDA Central Coast presence on the Central Coast Apprenticeship/Traineeship Advisory Committee. (Encourages school students to consider vocational training as a pathway for employment to promote a skilled workforce, engaging with employers and training organisations.)

## Marketing the Central Coast as a Business Location

**Objective:** To continue to lead the management of the inward investment website (investcentralcoast), the management of enquiry processes and to establish (and implement) a marketing strategy to promote the region, using the website as a basis. To represent the region at a range of expos, forums and the like, as a mechanism for driving investment.

**RDA Outcome Area:** Improved Community and Economic Development

### Activities:

Undertake a review of the Marketing Strategic Implementation Group (SIG) to ensure that actions are consistent with Commonwealth, state and local government direction and policy.

Ongoing work with web designers and committee on website appearance, content and functionality.

'investcentralcoast' website launched and active, website 'back-of-house' and enquiry processes established and in place.

Develop marketing strategy/materials to market website.

Secure funding for marketing of 'investcentralcoast' project and undertake marketing activities.

Addition of research and other materials to 'investcentralcoast' website as a 'one stop' information portal.

## Management of NSW Arts Program: Art Central 2013–2016 Phase 2

**Objective:** To support the art industry by creating a platform through which arts industries in the Central Coast region can be guided by the direct participation of the three tiers of government.

**RDA Outcome Area:** Improved Community and Economic Development

### Activities:

Art Central 2014-16 funding agreement implemented, RDA Central Coast auspice funds from Arts NSW and Wyong and Gosford Councils.

## Grants/Funding Advocacy

**Objective:** To ensure that Central Coast organisations are kept informed of opportunities to obtain funding under various grant/funding programs. To ensure that the Building Stronger Regional Communities initiative—and associated funds and initiatives—are proactively supported and administered in accordance with appropriate timeframes and requirements. To develop tools to assist regional organisations in improving the success of funding/grant writing processes.

**RDA Outcome Area:** Enhanced Awareness of Government Programs

### Activities:

Provide information and advice (to all sectors) on available grant/funding options.

Maintain regular meetings of the 'stakeholder group', which was established during 2014-15 to ensure a successful regional approach to grant writing project collaboration.

Administer/manage any Commonwealth or state funding initiative as required.

Host 1 or 2 day conference (with partners) on grant writing, project conceptualisation and collaboration.

## High Speed Broadband Rollout, Digital Strategy and Advocacy

**Objective:** Ensure that the region obtains maximum benefit from the high speed broadband rollout and to undertake appropriate activities to advocate for the emerging digital economy. Focus on implementing strategic goals of the National Digital Strategy, including increasing the number of workers making use of teleworking and 'closing the gap' between regional business and those in capital cities (goals 6 and 8 from the *National Digital Economy Strategy*). RDA Central Coast aims to make significant progress on the Regional Digital Strategy and to promote regional discourse/discussion in relation to leveraging the benefits of increased communications capacity.

**RDA Outcome Area:** Enhanced Awareness of Government Programs, Improved Regional Planning, Improved Community and Economic Development

### Activities:

Proactively support the release of the Central Coast Telework Strategy 2014–2020.

Partner in National Telework Week.

Ongoing training/delivery under 'Digital Enterprise' program.

Reconvene the Central Coast Broadband Implementation Group (CCBIG) meetings to discuss rollout priorities and to progress development of Digital Strategy.

## Business Incubator Strategy/Smart Work Hub

**Objective:** To review the activities and operation of the Business Incubator, including the effectiveness of the Business Incubator on business growth and to provide a 'launch pad' for new initiatives. To determine the potential for use of a portion of the Business Incubator space for the purposes of a Smart Work Hub.

**RDA Outcome Area:** Improved Community and Economic Development

### Activities:

Establish 'work group' to deal with Business Incubator strategy and processes. Review operations of the Central Coast Business Incubator with a view to establishing a portion of the building as a Smart Work Hub.

Prepare business and marketing plan for Business Incubator.

Action business plan & marketing plan to ensure Business Incubator achieves capacity targets

## Promotion of Regional Discourse/Discussion and Support Business Networks

**Objective:** To promote regional discourse and discussion on key issues for the Central Coast region, permitting for an environment for dealing with key issues, unblocking problems and promoting investment.

**RDA Outcome Area:** Enhanced Community Engagement and Consultation, Enhanced Awareness of Government Programs

### Activities:

Deliver 'Focus on the Coast' events throughout the year, dealing with key regional issues/activities.

Support and attend the Central Coast Business Excellence Awards.

Attend other business functions to discuss regional issues and priorities, including Business Chamber events, Business Review Networking Evenings, NSW Trade & Investment Seminars, Conferences and the like.

Regular one-on-one or small group meetings with key regional stakeholders, including Council Mayor/Councillors and General Managers, Central Coast Tourism CEO, Regional Manager for NSW Business Chamber, local MPs etc.

## Centres Development

**Objective:** To provide advocacy and support for:

The regeneration of Gosford as the Regional City of the Central Coast (as identified in the 'Central Coast Regional Strategy 2006-2031').

The draft Wyong Shire Economic Development Strategy 2014–2039.

Master planning and appropriate improvements to other regional centres and towns.

**RDA Outcome Area:** Enhanced Whole-of-Government Approach, Improved Community and Economic Development

### Activities:

Continue to support the 'Enabling Taskforce' initiative developed under the provisions of the Regional Economic Development & Employment Strategy (REDES) with appropriate attendees from council and government agencies. Attend bi-monthly meetings with 'Enabling Taskforce' throughout the year (with key to unlock development of major sites in the region).

Advocate, as appropriate, for the redevelopment/regeneration of Gosford as the Regional City of the Central Coast.

Advocate and support projects and initiatives contained in the draft Wyong Shire Economic Development Strategy 2014–2039.

Advocate and assist in the master planning and redevelopment/regeneration of other key regional towns and centres, including:

- Erina
- Wyong
- Long Jetty
- The Entrance
- Toukley

Proactively advocate through community consultation and communication with the media, the benefits, project status and government commitment to Centres and infrastructure development within the region.

Develop, deliver, advocate and proactively promote the Central Coast Infrastructure Priority List.

## Central Coast Innovation Strategy

**Objective:** To provide ongoing support to 'Innovation staff' (including Innov8 Central and Central Coast Manufacturing Connect) through provision of in-kind office accommodation, advocacy and assistance in fundraising and sponsorship.

**RDA Outcome Area:** Improved Community and Economic Development

**Activities:**

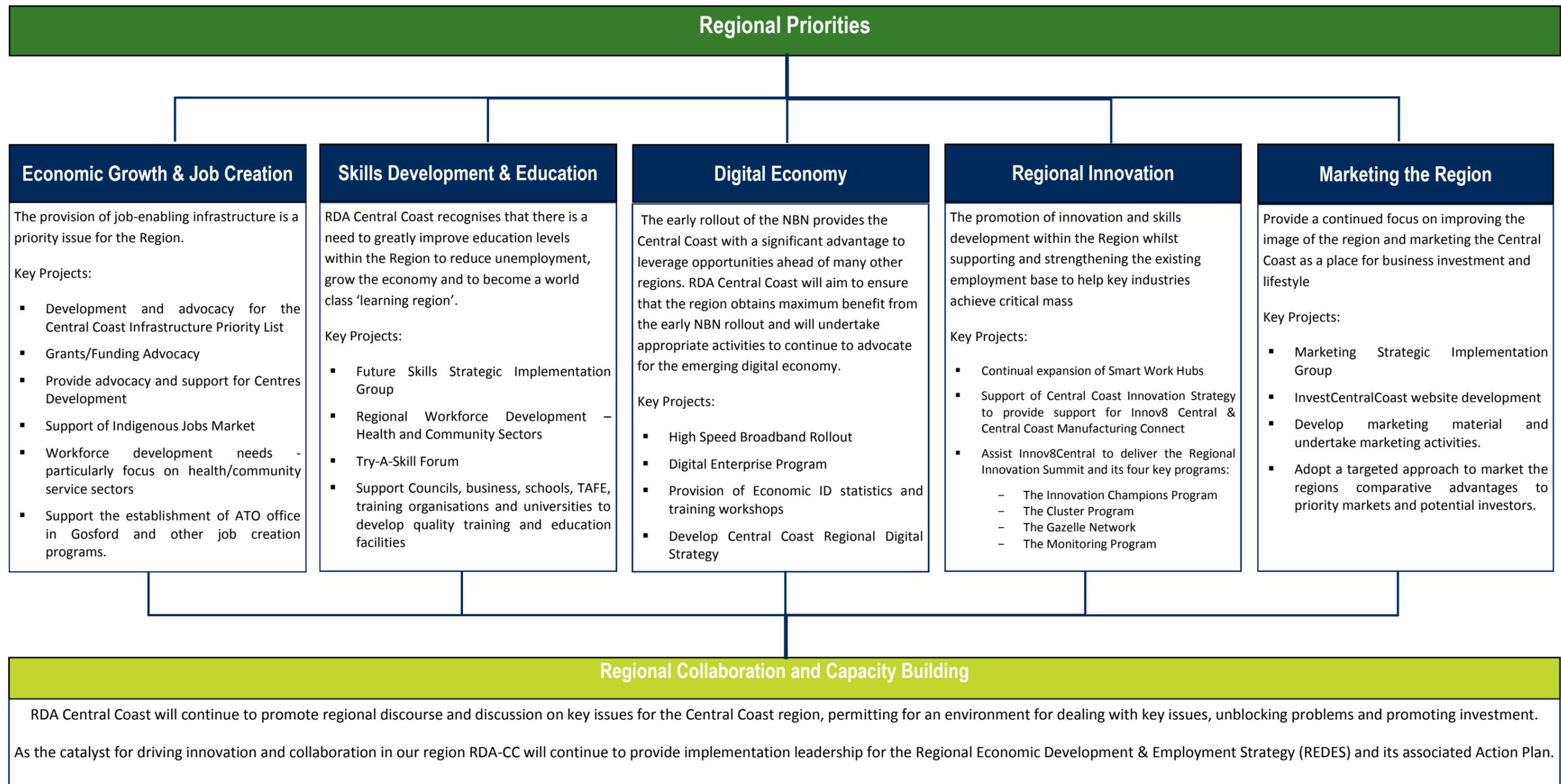
Continue collaboration with staff running Innovation programs through ongoing 'in-kind' support of office and equipment.

Ongoing support for the roll out of the Central Coast Innovation Champions Program.

Ongoing support and partnership in the delivery of the Central Coast Innovation Summit.

Ongoing support and partnership in the delivery of the Central Coast Economic Breakfasts.

SUMMARY OF REGIONAL PRIORITIES & PROJECTS



## REGIONAL SNAPSHOT

### Background

The Central Coast region incorporates the local government areas of Gosford City and Wyong Shire, having a total area of some 1,854 square kilometres. The geography of the region is characterised by extensive lakes and waterway systems, along with coastal beaches and mountain forest areas.

### Key Statistics

Table 8 - Central Coast Key Statistics



**328,110**  
Population 2014



**0.86%**  
Population Growth



**94.8%**  
English Speaking  
Background



**36,800**  
Projected new housing  
demand by 2031



**30,750**  
New jobs required  
over the next 20 years



**\$11.07B**  
Gross Regional Product



**25%**  
Commuting for Work



**Health Care, Retail,  
Construction & Manufacturing**  
Largest Employers & Value Added Industries



**42.2%**  
Hold Qualifications



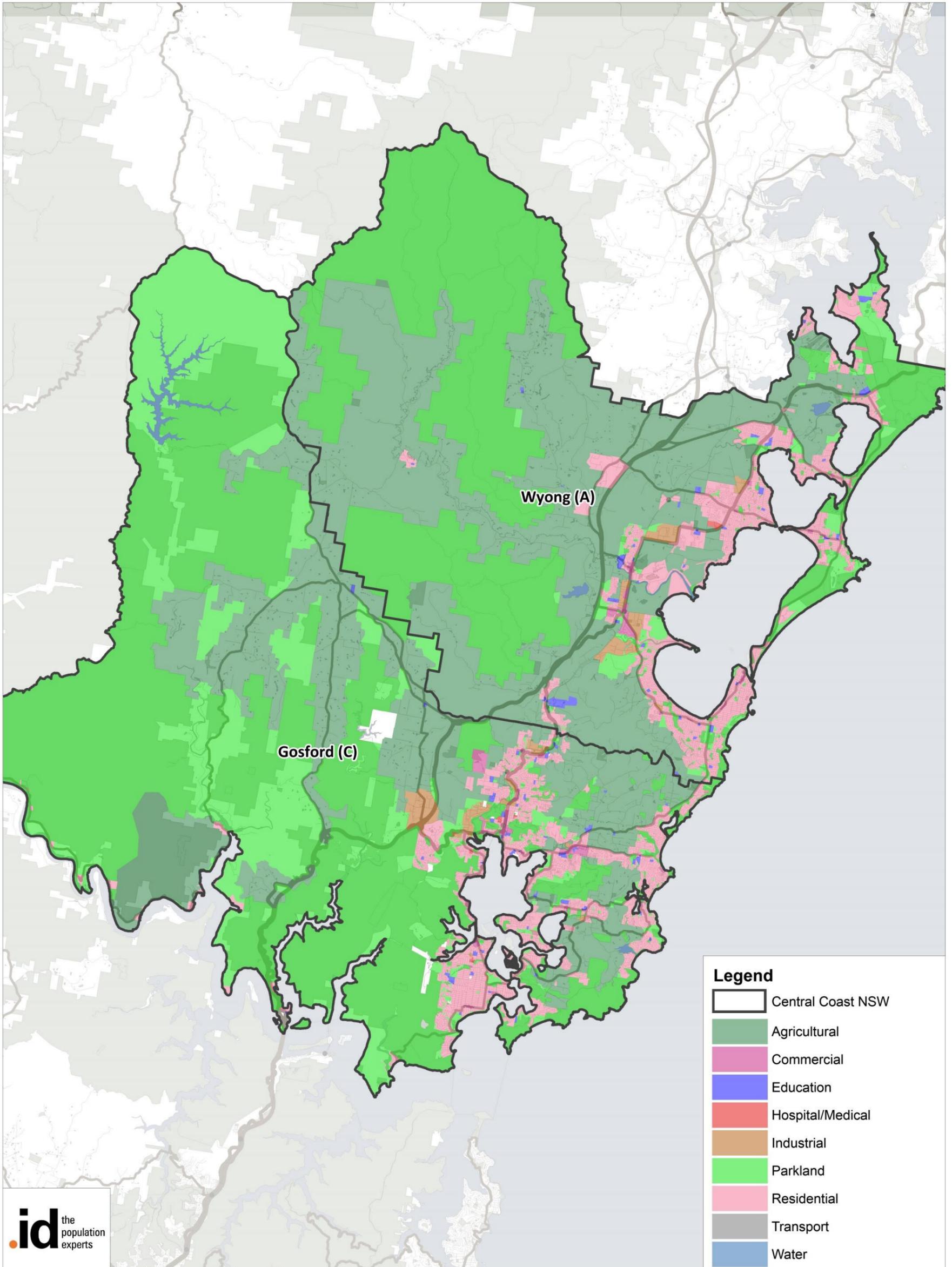
**10.3%**  
Youth Unemployment



**8.2%**  
Unemployment

Figure 1 - Infrastructure Map Central Coast

August 2014



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



## Human Capital

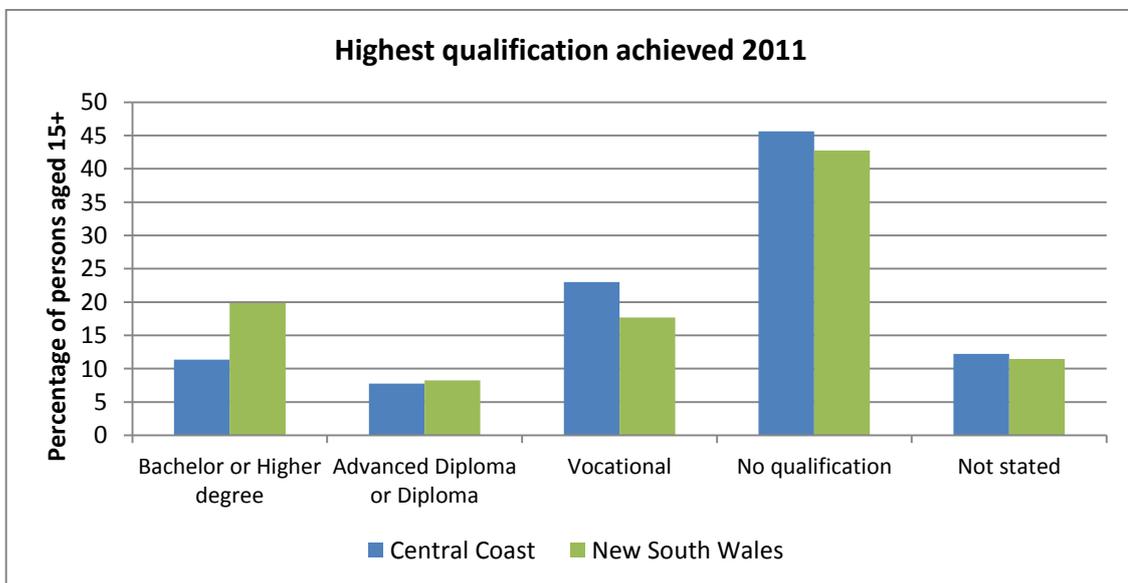
### Education Profile of the Workforce

Analysis of the qualifications of the population in Central Coast NSW in 2011 compared to New South Wales shows that there was a lower proportion of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or vocational qualifications), and a higher proportion of people with no formal qualifications.

Overall, 42.2% of the population aged 15 and over held educational qualifications, and 45.6% had no qualifications, compared with 45.8% and 42.8% respectively for New South Wales.

**45.6% of the population aged 15 and over have no qualifications**

**Figure 2 - Highest Qualification Achieved 2011**



The major differences between qualifications held by the population of Central Coast NSW and New South Wales were:

- A larger percentage of persons with no qualifications (45.6% compared to 42.8%)
- A larger percentage of persons with vocational qualifications (23.0% compared to 17.7%)
- A smaller percentage of persons with Bachelor or Higher degrees (11.4% compared to 19.9%)

The largest changes in the qualifications of the population in Central Coast NSW between 2006 and 2011 were in those with:

- Vocational qualifications (+8,110 persons)
- Bachelor or Higher degrees (+6,391 persons)
- Advanced Diploma or Diplomas (+3,252 persons)
- No qualifications (+890 persons)

### School Education

Analysis of the highest level of schooling attained by the population in Central Coast NSW in 2011 compared to New South Wales shows that there was a higher proportion of people who had left school at an early level (Year 10 or less) and a lower proportion of people who completed Year 12 or equivalent.

Overall, 48.5% of the population left school at Year 10 or below, and 35.7% went on to complete Year 12 or equivalent, compared with 37.9% and 47.6% respectively for New South Wales.

**48.5% of the population left school at Year 10 or below.**

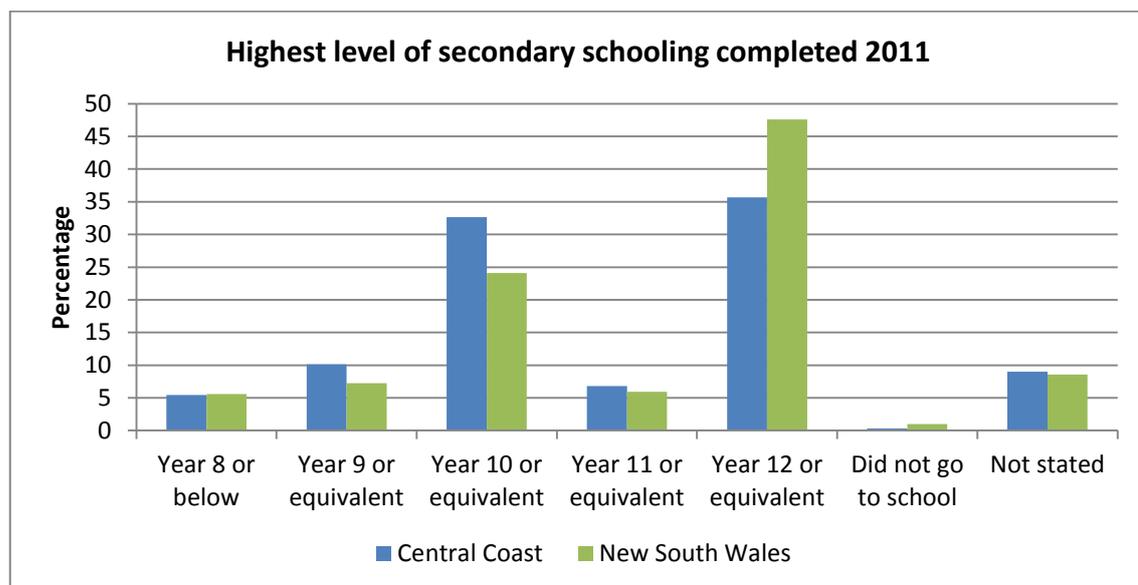
The major differences between the level of schooling attained by the population in Central Coast NSW and New South Wales were:

*A larger percentage of persons who completed year 10 or equivalent (32.7% compared to 24.1%)*

*A larger percentage of persons who completed year 9 or equivalent (10.1% compared to 7.3%)*

*A smaller percentage of persons who completed year 12 or equivalent (35.7% compared to 47.6%)*

**Figure 3 - Highest level of secondary schooling completed 2011**



### Fields of Qualifications

Analysis of the fields of qualifications of the workforce shows that the three largest fields of qualification were:

Management and Commerce (11,199 people or 12.4%)

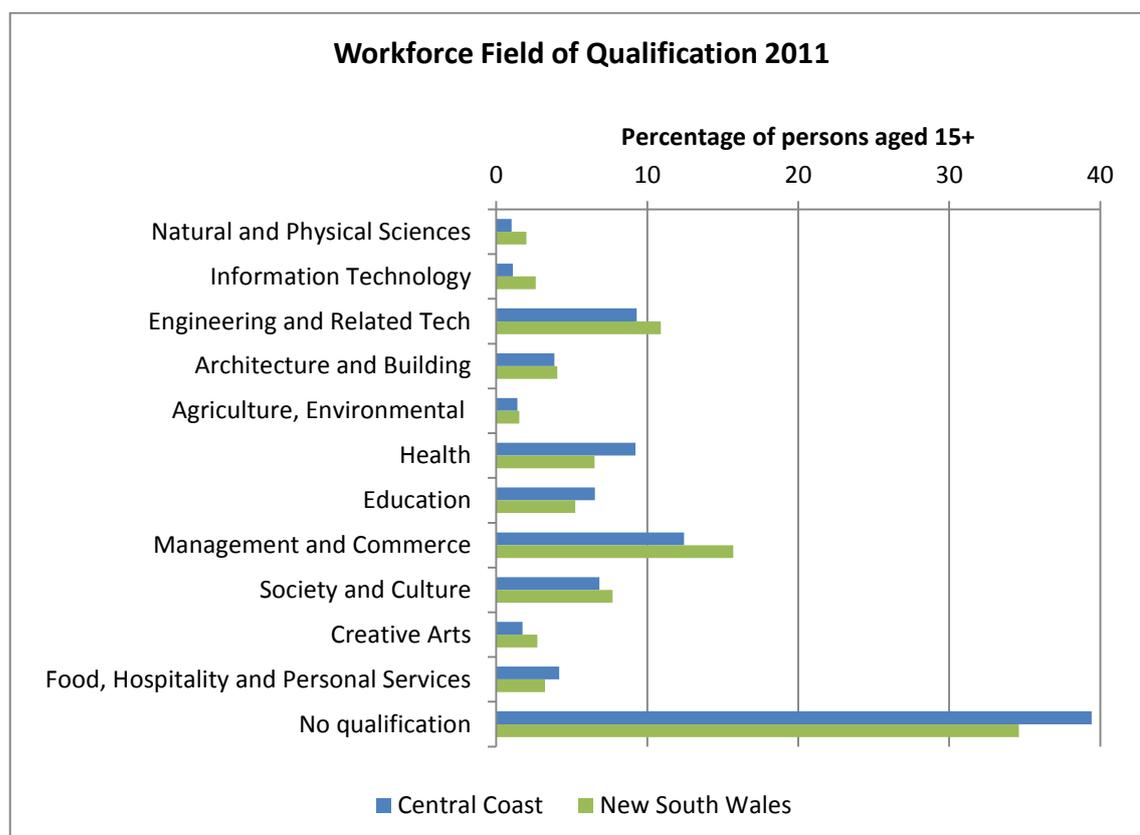
Engineering and Related Technologies (8,389 people or 9.3%)

Health (8,295 people or 9.2%)

In combination these three fields accounted for 27,883 people in total or 30.9% of the employed workforce.

In comparison, New South Wales employed 15.7% in Management and Commerce; 10.9% in Engineering and Related Technologies; and 6.5% in Health.

**Figure 4 - Workforce Field of Qualification 2011**



The major differences between the fields of qualifications of the workforce in Central Coast NSW and New South Wales were:

A larger percentage of people qualified in the field of Health (9.2% compared to 6.5%)

A smaller percentage of people qualified in the field of Management and Commerce (12.4% compared to 15.7%)

A smaller percentage of people qualified in the field of Engineering and Related Technologies (9.3% compared to 10.9%)

A smaller percentage of people qualified in the field of Information Technology (1.1% compared to 2.6%)

### Education Providers

The Central Coast has a number of significant education providers, including tertiary providers:

The University of Newcastle Central Coast campus;

TAFE has three Central Coast campuses – Ourimbah, Gosford and Wyong; and  
Central Coast Community College and Central Coast Grammar School.

241 Child Care Centres and 11 Preschools.

21 Government and 12 Independent High Schools in the regions with four Trade Training Schools.

The 'Allen Report' into tertiary education provision on the NSW Central Coast indicates that there is a strong case for extension of further higher education provision in the Region.



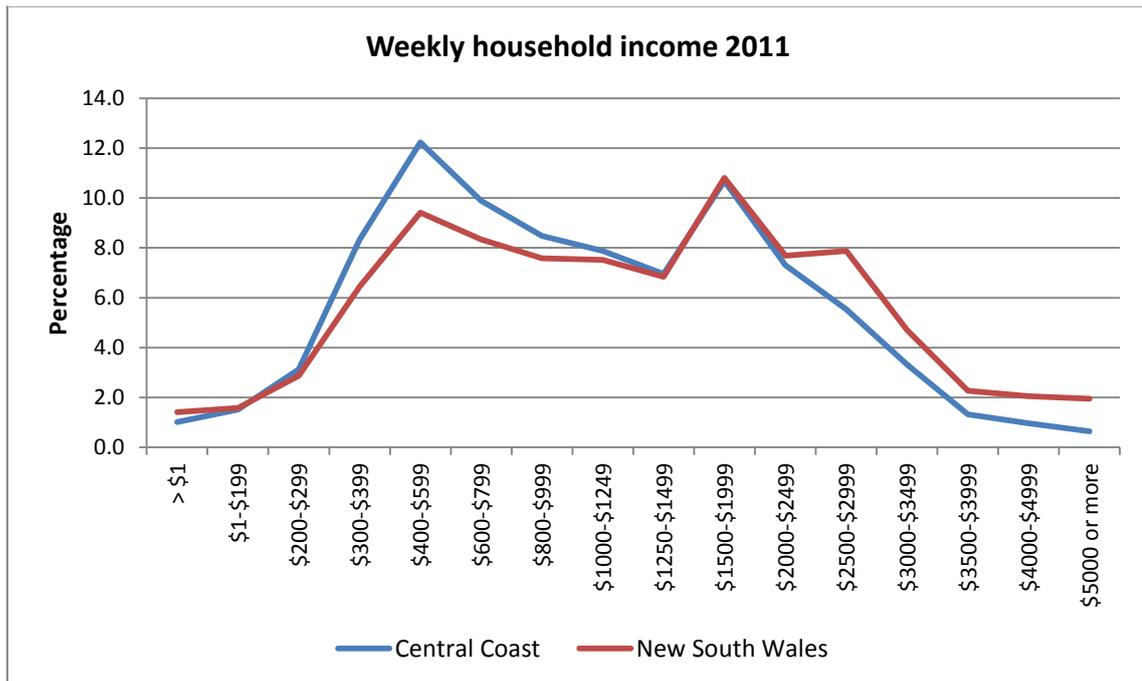
## Sustainable Communities and Population Growth

### Average Household Income

Analysis of household income levels in Central Coast NSW in 2011 compared to New South Wales shows that there was a smaller proportion of high income households (those earning \$2,500 per week or more) and a higher proportion of low income households (those earning less than \$600 per week).

Overall, 11.8% of the households earned a high income and 26.2% were low income households, compared with

Figure 5 - Weekly Household Income 2011



18.9% and 21.7% respectively for New South Wales.

The major differences between the household incomes of Central Coast NSW and New South Wales were:

- A *larger* percentage of households who earned \$400-\$599 (12.2% compared to 9.4%)
- A *larger* percentage of households who earned \$300-\$399 (8.3% compared to 6.4%)
- A *larger* percentage of households who earned \$600-\$799 (9.9% compared to 8.3%)
- A *smaller* percentage of households who earned \$2500-\$2999 (5.5% compared to 7.9%)

### Unemployment and Employment Status

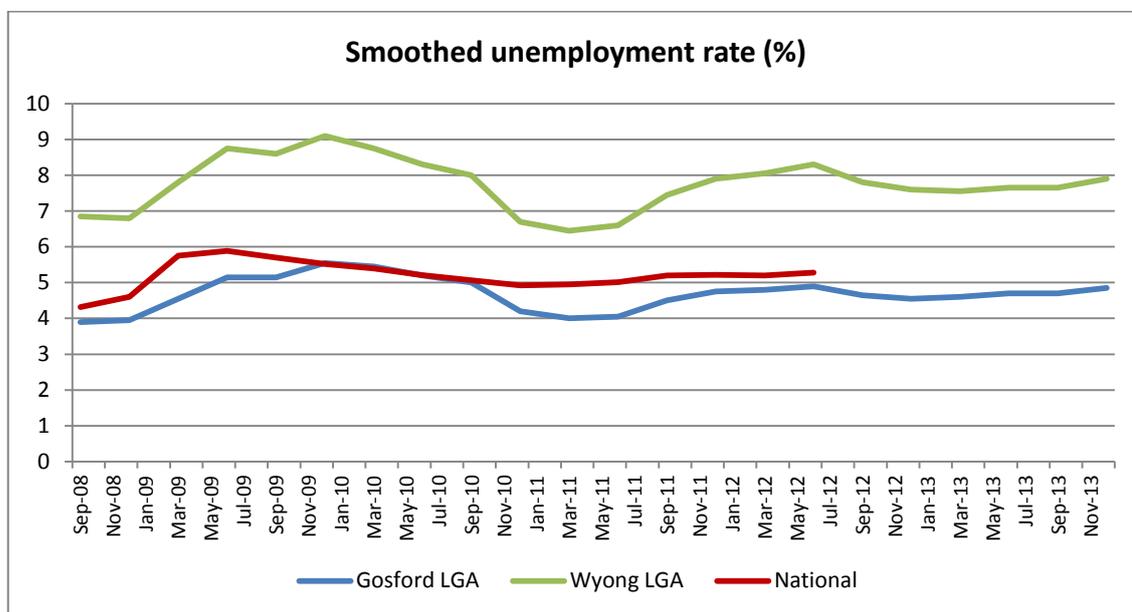
In the June 2014 quarter, the unemployment rate in Central Coast NSW was 8.2%, which is significantly higher than the NSW average of 5.7%. It is in line with the 8.3% unemployment rate from the neighbouring Hunter Valley Region (Australian Bureau of Statistics, June 2014). Approximately one quarter of unemployed persons on the Central Coast are 'long term unemployed' having been unable to secure employment for a period of longer than 12 months.

**Wyong LGA consistently has higher unemployment rates than both Gosford LGA**

Of the 131,006 people living in Central Coast NSW in 2011 who were employed, 60% worked full time and 38% part time.

Analysis of the Australian Regional Labour Markets data (ABS, 2013) indicates that unemployment rates for the Wyong LGA are consistently higher than those of the Gosford LGA and national unemployment rates.

**Figure 6 - Unemployment Rates**



(ABS, 2013) (MyRegion, 2014)

### Youth Unemployment

The latest ABS Labour Force data area profile from December 2013 shows that the youth (15 -24) unemployment rate is 10.3% with the teenage (15 -19) unemployment rate at 28%. (LMIP, 2013)

The Labour Market Information Portal states that the ABS Labour Force Survey estimates at the regional level, particularly for teenage unemployment, are subject to high levels of sampling error, and as such should be used with caution.

**Dec 2013  
Youth Unemployment  
10.3%  
Teenage Unemployment  
28.0%**

### SEIFA Index of Disadvantage

SEIFA Index of Disadvantage measures the relative level of socio-economic disadvantage based on a range of Census characteristics.

A higher score on the index means a lower level of disadvantage. A lower score on the index means a higher level of disadvantage.

**Table 9 - SEIFA Index of Disadvantage**

LGA	SEIFA Index of Disadvantage	Rank out of 153 LGAs
Gosford	1006.3	39
Wyong	951.7	99
Central Coast	980.1	

### Out-commuting

The Central Coast region has 151,673 residents employed in the year ending June 2013 (NIEIR, June 2014). The Department of Transport estimates that a relatively high proportion (25 per cent) of residents travel outside of the region for employment. Approximately 20 per cent of the region's workforce travels to Sydney, and 5 per cent to the Hunter region (NSW Department of Transport, Dec 2013). This equates to approximately 38,000 Central Coast residents travelling outside the region for employment each day. Whilst the overall percentage is down from 35 per cent in 2000 this is still a significant issue for the region.

**25% of residents travel outside of the region for**

### Changes in Industry Composition

In Central Coast NSW, Health Care and Social Assistance is largest employer, generating 13,687 FTE jobs in 2012/13.

An analysis of the jobs held by the full-time equivalent workforce in Central Coast NSW in 2012/13 shows the four largest industries were:

Health Care and Social Assistance (13,687 FTEs or 15.9%)  
Retail Trade (10,832 FTEs or 12.6%)  
Construction (9,041 FTEs or 10.5%)  
Manufacturing (8,421 FTEs or 9.8%)

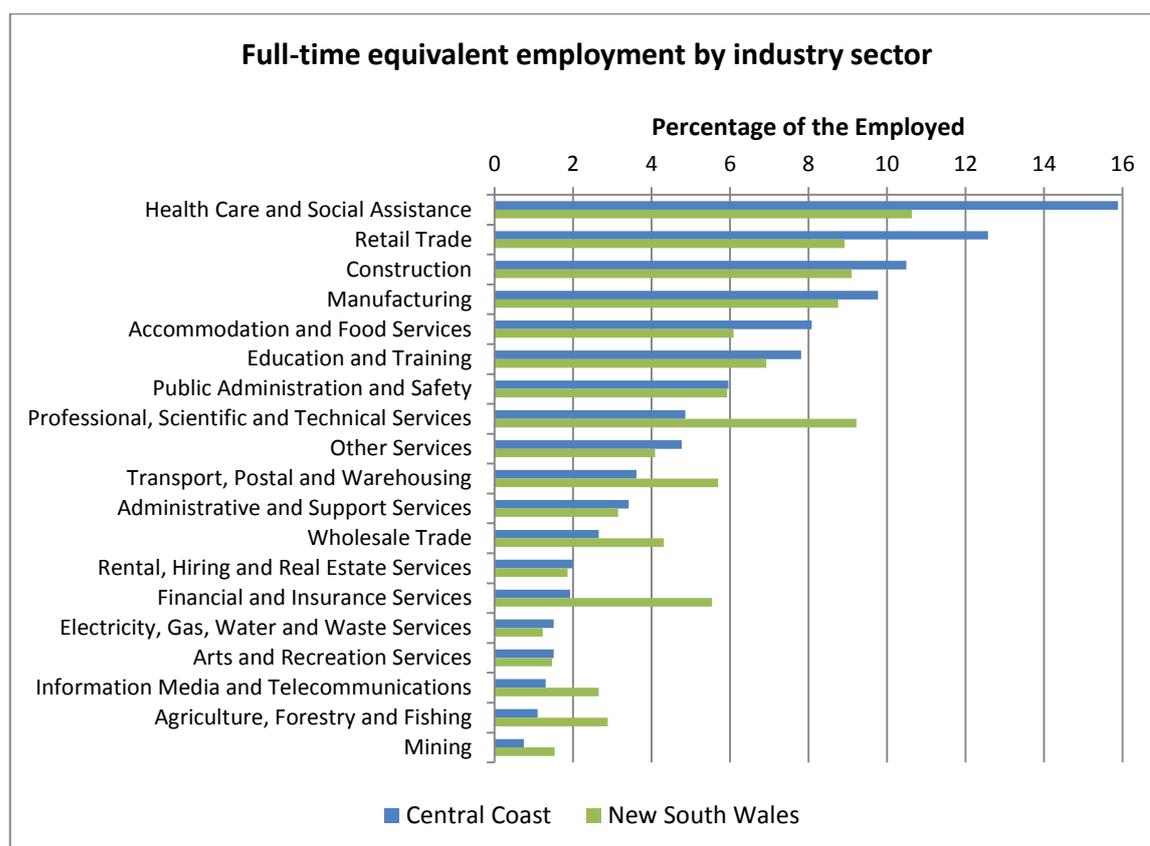
In combination these four industries accounted for 41,981 people in total or 48.8% of the workforce.

In comparison, New South Wales employed 10.6% in Health Care and Social Assistance; 8.9% in Retail Trade; and 9.1% in Construction.

**48% of regional employment is in four industry sectors**

- **Health Care and Social Assistance**
  - **Retail Trade**
  - **Construction**
  - **Manufacturing**

Figure 7 - FTE Employment by Industry Sector



The major differences between the jobs held by the full-time equivalent workforce of Central Coast NSW and New South Wales were:

*A larger* percentage of FTEs employed in Health Care and Social Assistance (15.9% compared to 10.6%)

*A larger* percentage of FTEs employed in Retail Trade (12.6% compared to 8.9%)

*A smaller* percentage of FTEs employed in Professional, Scientific and Technical Services (4.9% compared to 9.2%)

Between 2007/08 and 2012/13 the number of people in the full-time equivalent workforce in Central Coast NSW increased by 2,295.

The largest changes in the jobs held by the full-time equivalent workforce between 2007/08 and 2012/13 in Central Coast NSW were for those employed in:

Health Care and Social Assistance (+2,504 FTEs)

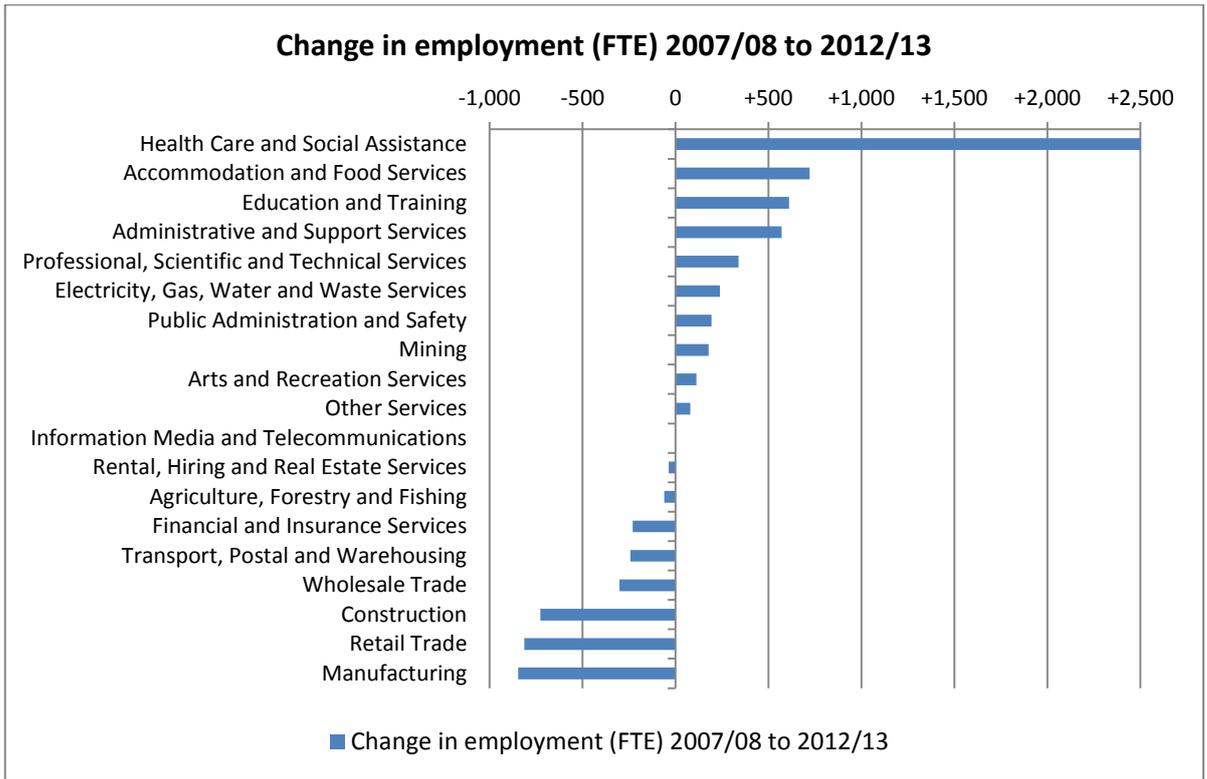
Manufacturing (-846 FTEs)

Retail Trade (-812 FTEs)

Construction (-726 FTEs)

**Between 2007/08 and 2012/13  
there were an additional 2,504  
FTE jobs in the Health Care and  
Social Assistance Sector.**

Figure 8 - Change in Employment (FTE) 2007/08 to 2012/13



### Value Added Industries

Value added by industry is an indicator of business productivity in Central Coast NSW. It shows how productive each industry sector is at increasing the value of its inputs. It is a more refined measure of the productivity of an industry sector than output (total gross revenue), as some industries have high levels of output but require large amounts of input expenditure to achieve that.

An analysis of the value added by industry sectors in Central Coast NSW in 2012/13 shows the three largest industries were:

Health Care and Social Assistance  
(\$1,232 million or 13.5%)

Manufacturing (\$949 million or 10.4%)

Retail Trade (\$778 million or 8.5%)

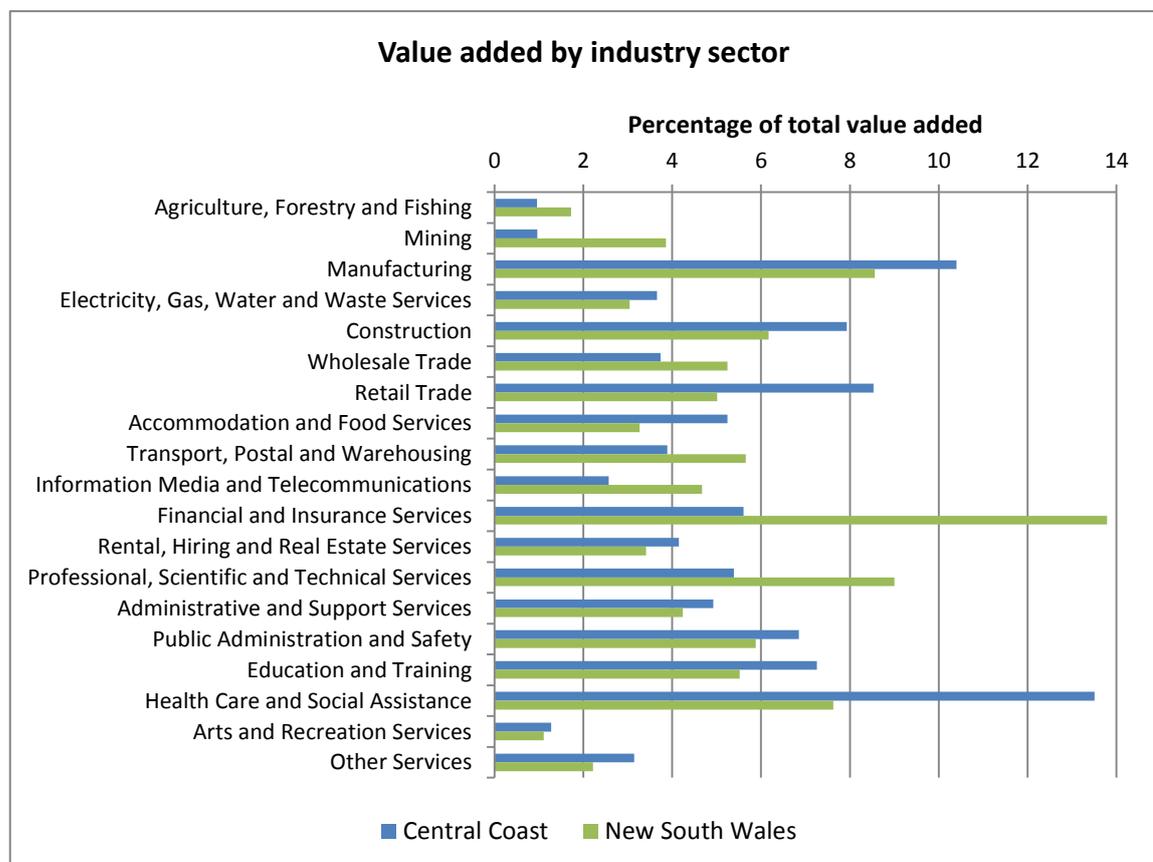
In combination these three industries accounted for \$2,959 million in total or 32.4% of the total value added by industry in Central Coast NSW.

In comparison, the same 3 industries in New South Wales accounted for 7.6% in Health Care and Social Assistance; 8.6% in Manufacturing; and 5.0% in Retail Trade.

### 40% of regional value added is in four industry sectors

- **Health Care and Social Assistance**
  - **Retail Trade**
  - **Construction**
  - **Manufacturing**

Figure 9 - Value Added by Industry Sector



The major differences between the value added by industries of Central Coast NSW and New South Wales were:

A larger percentage of value added by Health Care and Social Assistance (13.5% compared to 7.6%)

A larger percentage of value added by Retail Trade (8.5% compared to 5.0%)

A smaller percentage of value added by Financial and Insurance Services (5.6% compared to 13.8%)

A smaller percentage of value added by Professional, Scientific and Technical Services (5.4% compared to 9.0%)

The total value added by industry in Central Coast NSW increased by \$622.1 million between 2006/07 and 2012/13.

The largest changes in the value added by industries between 2006/07 and 2012/13 in Central Coast NSW were for:

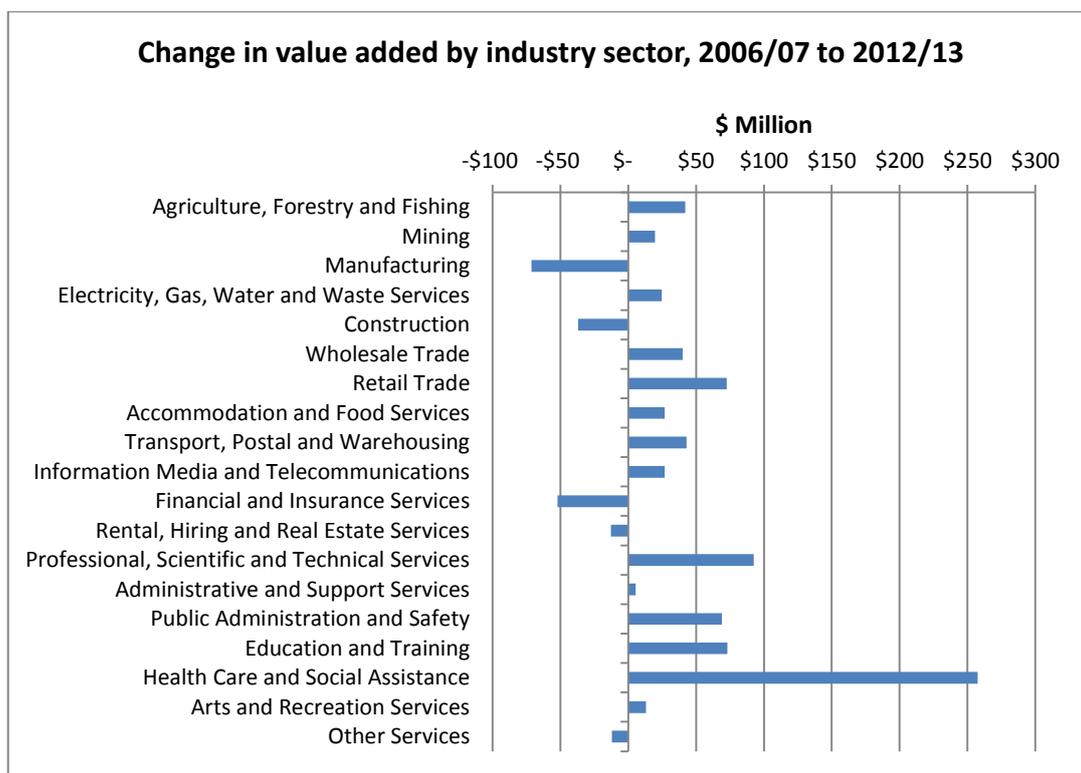
Health Care and Social Assistance (+\$257 million)

Professional, Scientific and Technical Services (+\$92 million)

Education and Training (+\$73 million)

Retail Trade (+\$73 million)

**Figure 10 - Change in Value Added by Industry Sector, 2006/07 to 2012/13**



## Water and Environmental Management

### Water Management

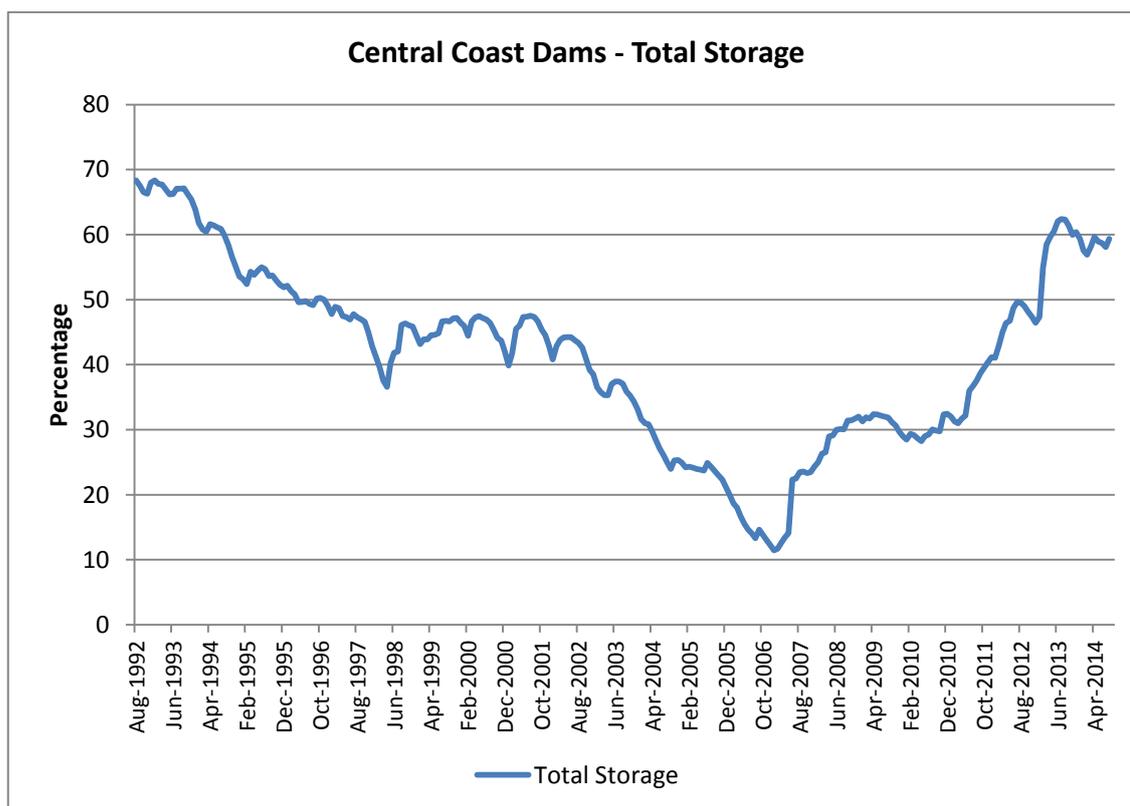
The Central Coast Regional Strategy (Department of Planning & Environment, 2014) states that developing a safe and secure water supply without compromising the health of the Region's water sources is one of the greatest challenges that the Region faces. These changes mean that a range of options need to be considered to develop a more secure water supply system and that future growth must be carefully managed.

The Central Coast plateaus and Wyong valleys are important water catchment areas and are coming under increased pressure for development. Future growth across the Region needs to be sensitive to both its impact on the quality of the water supply and the increased demand on the water supply system.

The key water challenges include:

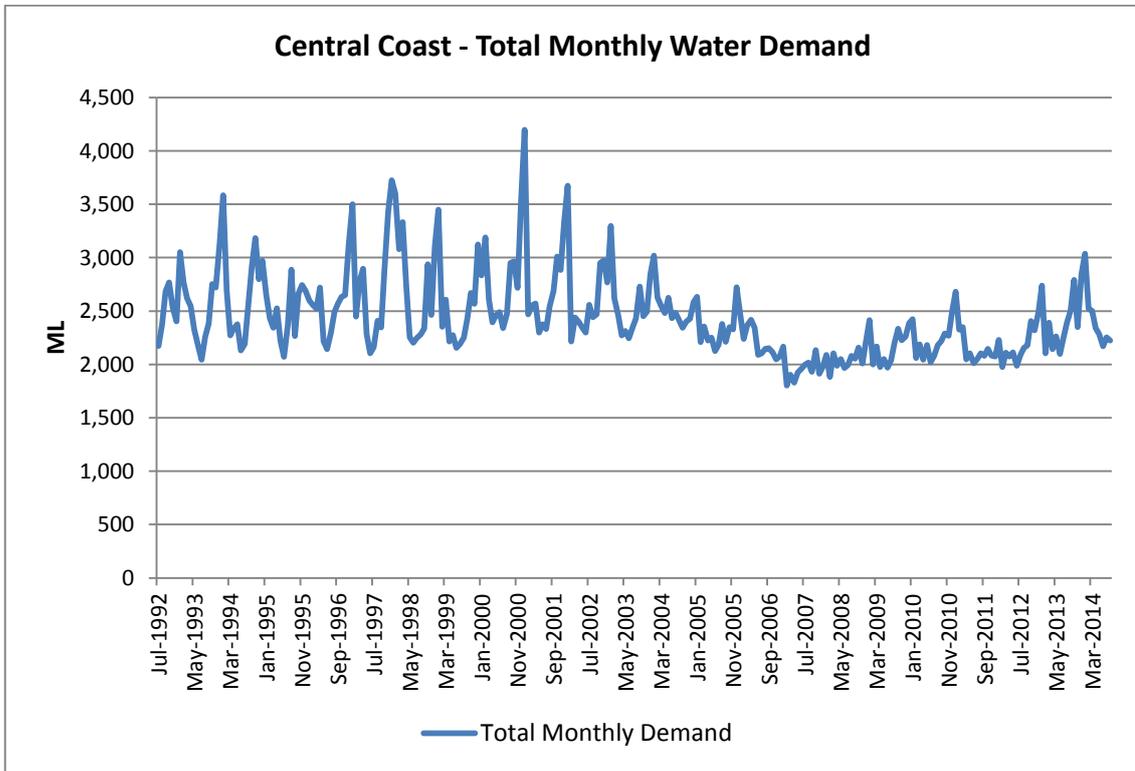
- providing a sustainable long-term water supply for residential, employment and environmental purposes
- protecting the health of the Region's rivers, lakes, underground water sources and estuaries
- protecting water catchment areas from inappropriate development
- managing population growth in relation to the capacity of water supply
- investigating alternative water sources that are sustainable in the longer term.

**Figure 11 - Central Coast Dams - Total Storage**



Analysis of water usage data shows demands dropped from 2000 to 2007 in response to restrictions and demand management during the millennium drought. Demands are slowly rising again but still less than 2000 even though there has been an increase in population. Due to limited water sources on the Central Coast ongoing demand management and water efficiencies are a key feature in water management on the Central Coast.

**Figure 12 - Central Coast - Total Monthly Water Demand**



**Figure 13 - Mangrove Dam**



## Environment

The continued demand for new housing within the constrained geography of the Region could place pressure on the Central Coast's environment. The North Wyong Shire Structure Plan Area covers land within the catchments of Lake Macquarie and Tuggerah Lakes, the Porters Creek wetland and includes a significant east-west regional biodiversity corridor. Planning in this area, and throughout the Region, needs to minimise adverse impacts on these areas and ensure future residents are not at risk from hazards such as flooding, coastal erosion, bushfire and changes due to climate change. Existing development is concentrated along the coastline and coastal waterways and already places pressure on these sensitive environments.

Securing the Region's long-term water supply without compromising the health of the Region's rivers, estuaries and lakes is a priority for the Central Coast. Population growth and the demand for new housing must be managed to protect the natural environment, the Region's biodiversity, its agricultural and resource lands and its Aboriginal and non-Aboriginal cultural heritage.

The western half of the Region (west of the M1 Motorway) is largely comprised of the Central Coast plateaus and Wyong valleys. These lands support agricultural production and contain water supply catchments which must be protected from urban and rural residential uses. The natural environment also includes a number of resource areas that need to be balanced with biodiversity values.

The key environmental challenges include:

- Providing a sustainable long-term water supply whilst providing a balance between future development and important conservation values.

- Improving identification, protection and enhancement of natural environments, including significant biodiversity corridors, regionally significant vegetation, coastal lakes and estuaries, and landscape values.

- Managing stormwater to protect downstream receiving environments and identifying opportunities for sustainable use of this valuable resource.

- Improving understanding of Aboriginal cultural heritage values and incorporating this information within land use planning and natural resource management processes.

- Allowing for development and redevelopment while protecting significant cultural heritage.

- Accepting the value of rural lands as food-producing lands and ensuring the long term protection of these assets.

- Managing natural hazards in new developments, including flooding, coastal erosion and inundation (including the impacts of climate change), land instability, bushfire and acid sulphate soils.

### Urban Growth Pressures

The Region's waterways, topography and conservation areas, along with important resource lands, limit the expansion of the urban footprint. This means that future growth will largely be contained within existing settlement areas, apart from nominated greenfield areas. In planning for growth and change, the Central Coast Region faces a number of challenges in relation to water supply, economics and transport, the environment and population centres and housing.

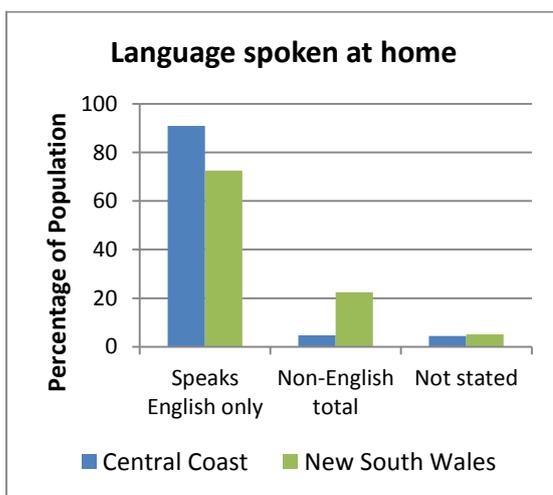
### Cultural Diversity and Indigenous Population

Analysis of the country of birth of the population in Central Coast NSW in 2011 compared to New South Wales shows that there was a smaller proportion of people born overseas, as well as a smaller proportion of people from a non-English speaking background.

Overall, 14.0% of the population was born overseas, and 5.2% were from a non-English speaking background, compared with 25.7% and 18.6% respectively for New South Wales.

**Only 5.2% of the Central Coast population is from a non-English speaking**

**Figure 14 - Language spoken at home**



The largest non-English speaking country of birth in Central Coast NSW was Philippines, where 0.4% of the population, or 1,280 people, were born.

The major differences between the countries of birth of the population in Central Coast NSW and New South Wales were:

A larger percentage of people born in United Kingdom (5.8% compared to 4.0%)

A smaller percentage of people born in China (0.3% compared to 2.3%)

A smaller percentage of people born in India (0.2% compared to 1.4%)

Between 2006 and 2011, the number of people born overseas increased by 4,049 or 10.2%, and the number of people from a non-English speaking background increased by 2,378 or 17.0%.

The largest changes in birthplace countries of the population in this area between 2006 and 2011 were for those born in:

United Kingdom (+603 persons)

New Zealand (+446 persons)

China (+309 persons)

South Africa (+292 persons)

In the 2011 Census 2.9% of the Central Coast Population identified as Aboriginal or Torres Strait Islander which is only slightly higher than the NSW rate of 2.5%. (Australian Bureau of Statistics, 2011)

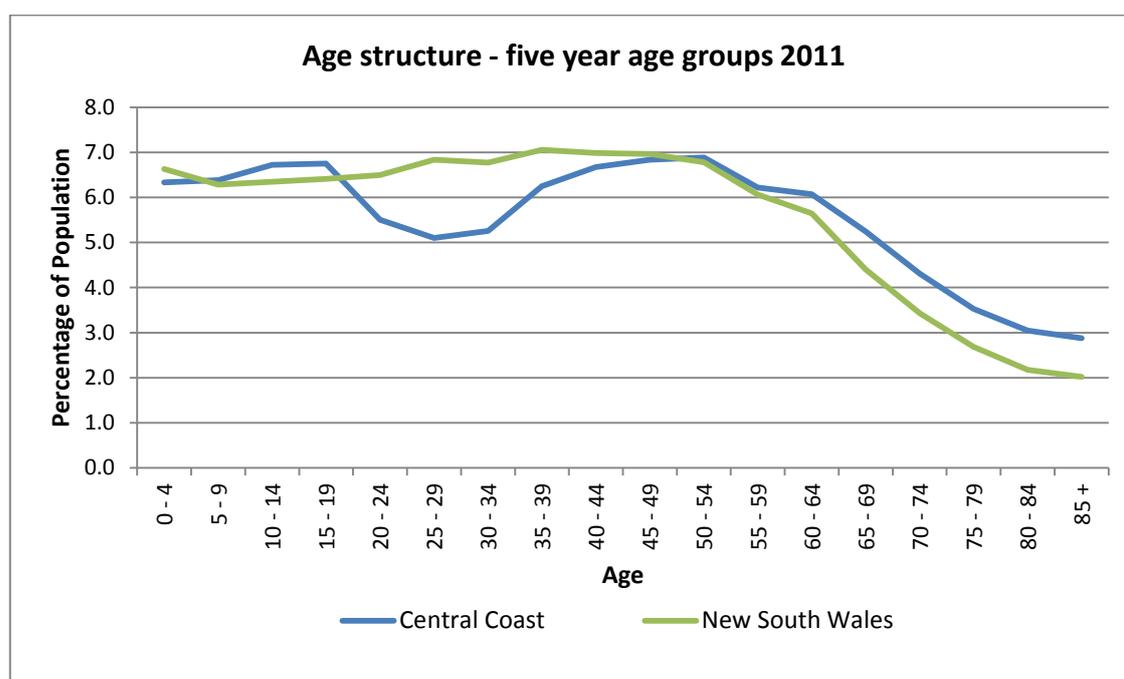
The Aboriginal community is represented on the Central Coast by the Darkinjung Local Aboriginal Land Council, which has emerged as one of the largest private land-owners in the region and has been successful in partnering with a range of organisations to deliver much needed services and assistance to the indigenous population.

## Regional Demographics

Analysis of the five year age groups of Central Coast NSW in 2011 compared to New South Wales shows that there was a similar proportion of people in the younger age groups (under 15) and a higher proportion of people in the older age groups (65+).

Overall, 19.4% of the population was aged between 0 and 15, and 19.0% were aged 65 years and over, compared with 19.3% and 14.7% respectively for New South Wales.

**Figure 15 - Age Structure**



The major differences between the age structure of Central Coast NSW and New South Wales were:

*A larger percentage of persons aged 70 to 74 (4.3% compared to 3.4%)*

*A smaller percentage of persons aged 25 to 29 (5.1% compared to 6.8%)*

*A smaller percentage of persons aged 30 to 34 (5.3% compared to 6.8%)*

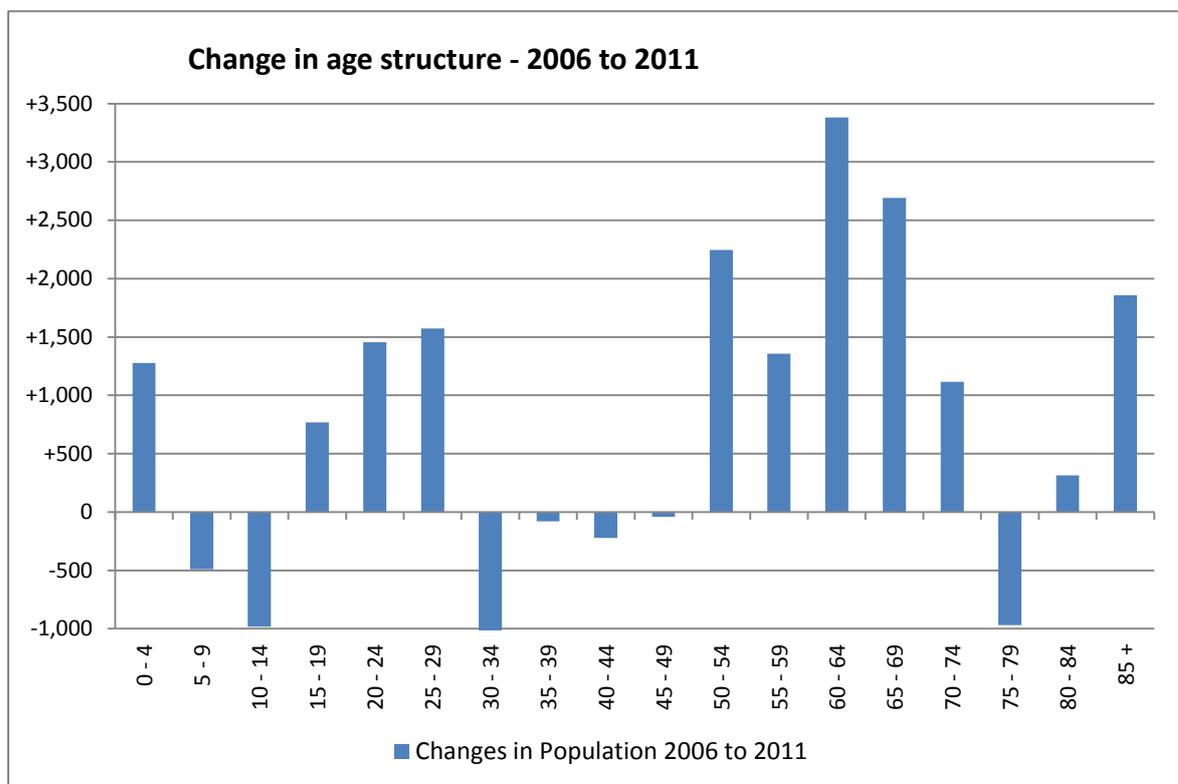
*A smaller percentage of persons aged 20 to 24 (5.5% compared to 6.5%)*

From 2006 to 2011, Central Coast NSW's population increased by 14,225 people (4.8%). This represents an average annual population change of 0.94% per year over the period.

The largest changes in age structure in the Region between 2006 and 2011 were in the age group 50 – 75 with an increase of 10,793 people.

**The largest changes in age structure in the Region between 2006 and 2011 were in the age group 50 – 75 with an increase of 10,793 people.**

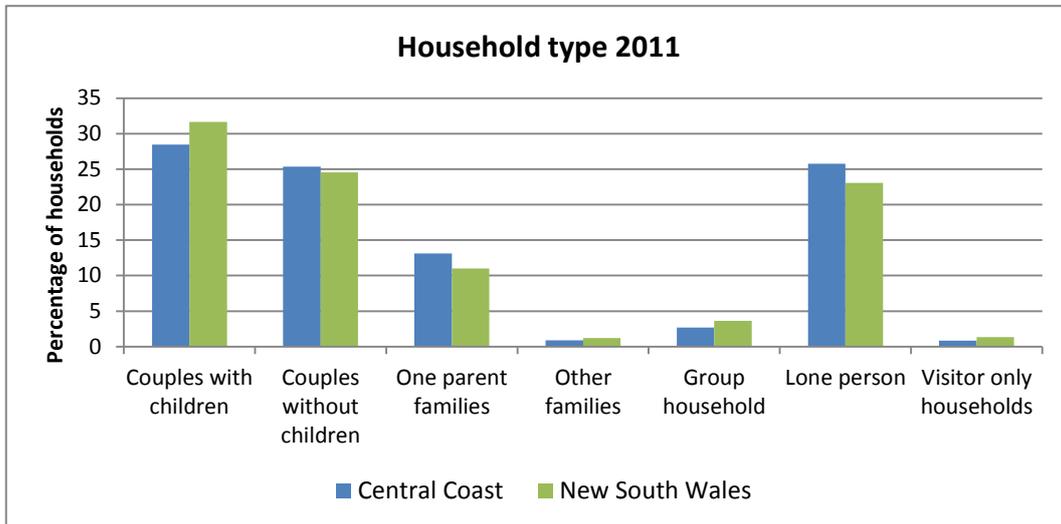
**Figure 16 - Change in Age Structure**



### Household and Family Types

Analysis of the household/family types in Central Coast NSW in 2011 compared to New South Wales shows that there was a lower proportion of couple families with child(ren) as well as a higher proportion of one-parent families. Overall, 28.5% of total families were couple families with child(ren), and 13.1% were one-parent families, compared with 31.7% and 11.0% respectively for New South Wales.

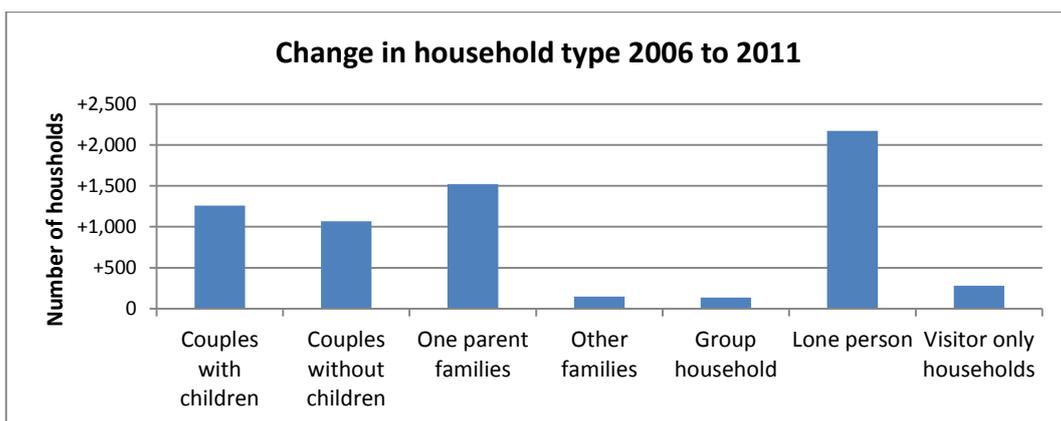
**Figure 17 - Household Type 2011**



There were a higher proportion of lone person households and a higher proportion of couples without children. Overall, the proportion of lone person households was 25.8% compared to 23.1% in New South Wales while the proportion of couples without children was 25.3% compared to 24.5% in New South Wales.

Between 2006 and 2011 the number of households in the Central Coast increased by 5,728.

**Figure 18 - Change in Household Type 2006-2011**



The largest changes in family household types in Central Coast NSW between 2006 and 2011 were:

- Lone person (+2,171 households)
- One parent families (+1,521 households)
- Couples with children (+1,260 households)
- Couples without children (+1,068 households)

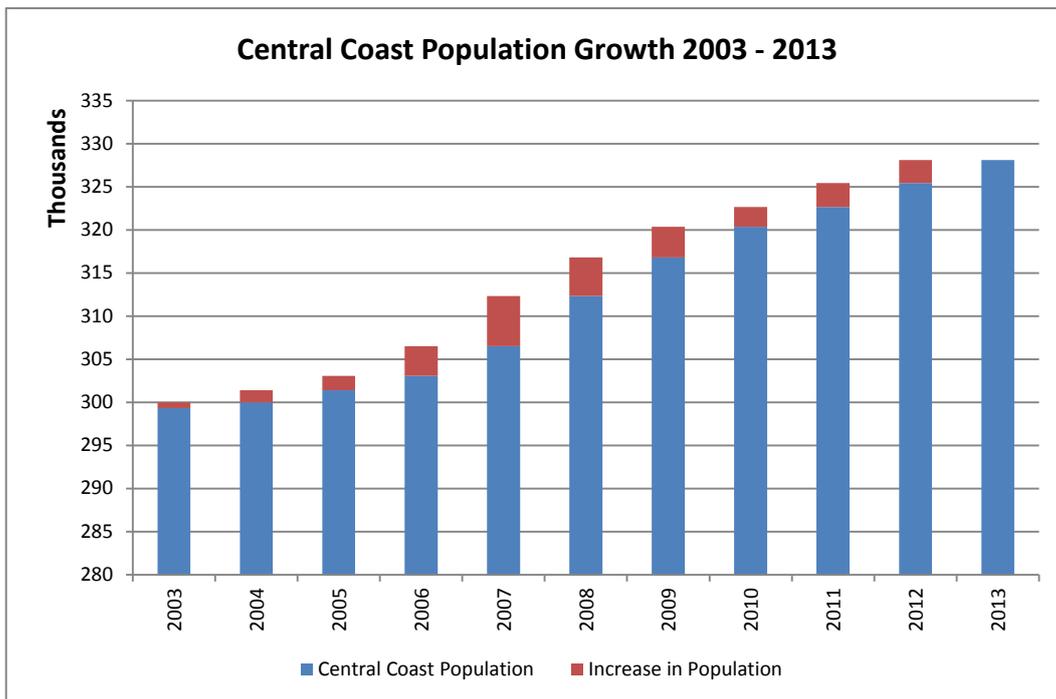
**Between 2006 and 2011 the number of households in the Central Coast increased by 5,728.**

### Population Growth

The population of the region is in the order of 328,000, with an annual growth rate of approximately 2,700 people (approx. 0.83%). (Australian Bureau of Statistics, 2011). Population growth has slowed in the past four years from a high of 1.9% growth in 2008 to a current population growth rate of 0.86%.

**Population growth has slowed in the past four years from a high of 1.9% growth in 2008 to a current population growth rate of**

**Figure 19 - Population Growth**



(Australian Bureau of Statistics, 2011)

In accordance with the Central Coast Regional Growth and Infrastructure Plan Discussion Paper (Department of Planning & Environment, 2014), the region is anticipated to have a population of approximately 386,900 people by 2031, and it will require the construction of around 36,800 new residences to accommodate this growth. In addition, the discussion paper indicates that additional commercial, industrial and retail space will be required to provide approximately 30,750 additional jobs by 2031.

## Access to International, National and Regional Markets

### Proximity to Sydney & Newcastle

The Central Coast has significant advantage in relation to its location, strategically situated between the urban centres of Sydney and the Newcastle/Hunter Valley. This provides businesses the capacity to access these markets, especially the professional markets within the Sydney and Newcastle metropolitan areas along with the industries associated with the Hunter Valley mining and agricultural sectors. Proximity to these centres also provides for access to international airports, shipping facilities and the like which aids in connectivity to international markets.

This proximity is further enhanced by good inter-regional transport connectivity. The Central Coast region is connected in the south to Sydney (Canberra and Melbourne) as well as north to Newcastle (the NSW Mid-North Coast and Brisbane) by the M1 Motorway. In addition, the northern rail corridor provides movement for freight and passengers. Travelling time to the Sydney CBD, Parramatta, Chatswood and Newcastle/Hunter is around 60 minutes.

The location of the region provides access to finished goods and raw materials along east coast transport corridor, as well as access to the labour force between Sydney and Newcastle. The region already makes use of this connectivity and a number of exporters (including manufacturing, education and service industries) export to regions as diverse as Asia (China, Malaysia) the Pacific (New Zealand) as well as the Middle East and America.

The strategic location of the Central Coast between Sydney and Newcastle, excellent transport links, available land and motivated workforce have made it a desired place for warehouse, logistics and distribution activities. Alliance Distribution Services, Toll and Woolworths have established distribution and logistics centres within the region.

### Export Industries

An analysis of the total exports by industry sectors in Central Coast NSW in 2012/13 shows the three largest industries were:

Manufacturing (\$1,810 million or 48.1%)

Health Care and Social Assistance (\$478 million or 12.7%)

Administrative and Support Services (\$379 million or 10.1%)

In combination these three industries accounted for \$2,667 million in total or 70.9% of the total exports by total industry in Central Coast NSW.

In comparison, the same 3 industries in New South Wales accounted for 25.8% in Manufacturing; 5.1% in Health Care and Social Assistance; and 3.9% in Administrative and Support Services.

The major differences between total exports by industries in Central Coast NSW and New South Wales were:

*A larger* percentage of total exports by Manufacturing (48.1% compared to 25.8%)

*A larger* percentage of total exports by Health Care and Social Assistance (12.7% compared to 5.1%)

*A smaller* percentage of total exports by Financial and Insurance Services (1.7% compared to 11.8%)

*A smaller* percentage of total exports by Professional, Scientific and Technical Services (0.3% compared to 7.3%)

The total exports by industries in Central Coast NSW increased by \$294.4 million between 2007/08 and 2012/13.

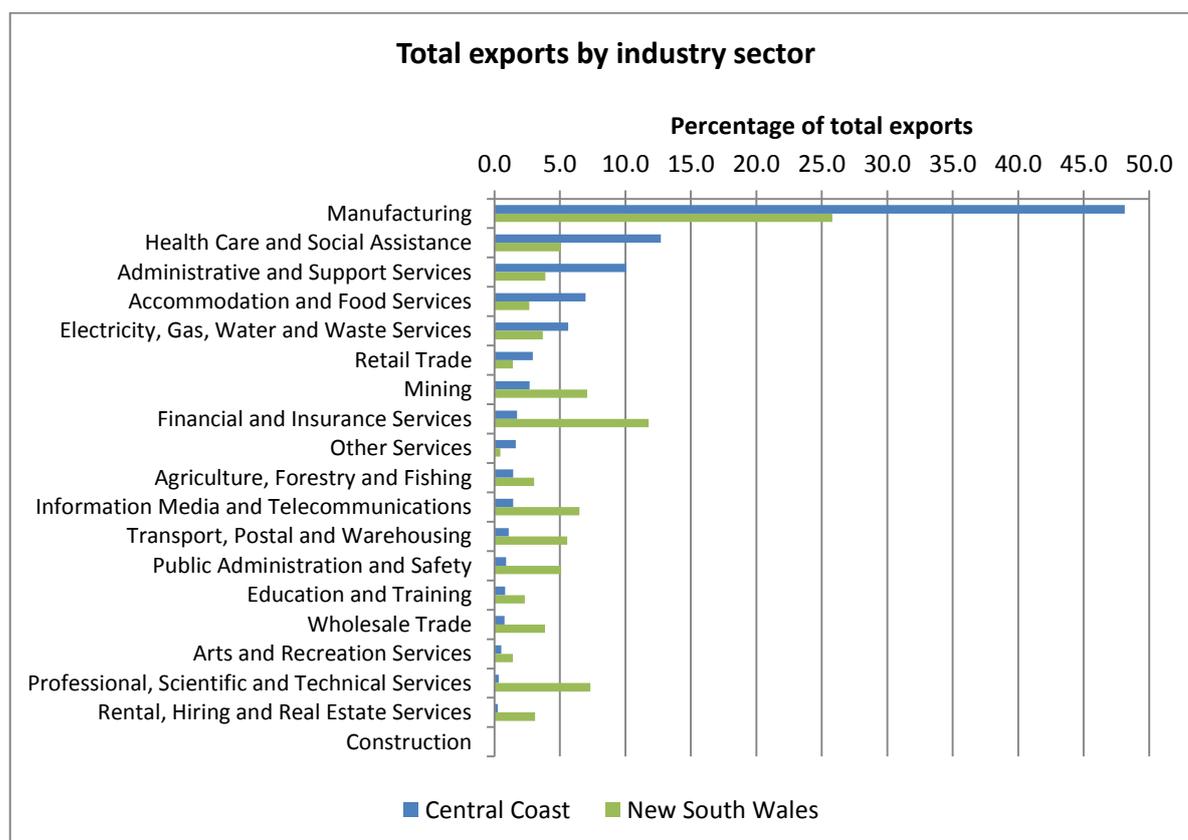
**48.1% of Exports  
were in the  
Manufacturing  
Industry**

The largest changes in total exports by industries between 2007/08 and 2012/13 in Central Coast NSW were for:

- Manufacturing (+\$221 million)
- Other Services (-\$143 million)
- Health Care and Social Assistance (+\$98 million)
- Electricity, Gas, Water and Waste Services (+\$58 million)

Food Product and Machinery and Equipment Manufacturing accounted for 24.2% of the manufacturing exports with \$908.6 million.

**Figure 20 - Total Exports by Industry Sector**



## Regional Infrastructure

Perhaps the greatest challenge is to create local job opportunities to match labour force growth, whilst protecting the Region's natural environment. The proportion of the adult workforce commuting out of the Region for work has increased to over 25 per cent, resulting in a range of specific infrastructure and social challenges. The Region needs to take advantage of its location between the global city of Sydney and regional city of Newcastle, and increase employment self-containment, to reduce the need for out-commuting. Providing capacity for over 30,750 new jobs over the next 20 years will help ensure a robust and adaptable economy.

The economic base of the Central Coast is varied and covers many sectors. Key economic sectors include manufacturing, retail, agriculture, tourism, construction, and service industries such as health and community services and property and business services.

Sectors expected to experience strong growth over the next 25 years include wholesaling, retailing, property and business services, tourism, health services, cultural and recreational services and personal services.

Strengths of the Central Coast's economy include innovative small manufacturers, competitiveness in logistics, strong growth in building and construction, food production, hospitality and tourism.

The key economic and transport challenges include:

Ensuring that sufficient employment lands and commercial office space is provided in appropriate locations to accommodate growth in existing and emerging industries and businesses.

Increasing and diversifying job opportunities and increasing the level of employment self-containment.

Promoting innovation and skills development within the Region whilst supporting and strengthening the existing employment base to help key industries achieve critical mass.

Encouraging and investigating opportunities to diversify the Region's economy protecting existing and proposed transport corridors within the Region and to surrounding regions.

Capitalising on the Region's position between Sydney and Newcastle to market the Region as a business location.

Supporting and strengthening tourism opportunities as well as managing the impact of seasonal population fluctuations on the Region's environment and infrastructure.

Regional Development Australia Central Coast has coordinated the development of the Regional Infrastructure Priorities List which provides an agreed list of the key infrastructure needed on the Central Coast to grow investment and employment. The current list includes:

- Link Road, Watanobbi to Sparks Road
- Porter's Creek Wetland Protection Scheme
- Sparks Road Improvement Plan
- North Warnervale Railway Station
- Central Coast Regional Airport
- Water, sewer, roads, drainage infrastructure
- Gosford CBD Trunk Sewer Relocation
- CBD Road Improvements
- Mangrove Creek Dam Probable Maximum Flood Upgrade
- Mardi Water Treatment Plant - Natural Organic Material Removal
- Unserviced Development Areas – Sewer, Gosford LGA
- Central Coast Regional Performing Arts Centre, Gosford
- Central Coast Regional Sporting & Recreational Complex, Tuggerah
- Pacific Highway Widening, Wyong Town Centre
- Pacific Highway Widening, Narara – Lisarow – Ourimbah
- Woy Woy Wharf Upgrade
- M1 Productivity Improvements

## Regional Communications

## National Broadband Network/Telecommunications

The Central Coast has been identified as one of the first rollout locations for the National Broadband Network (with two rollout locations) and connectivity has already been established in the Gosford CBD as well as Berkeley Vale and Tuggerah areas. The rollout of the NBN will continue progressively throughout the region, with approximately 80% of premises on the Central Coast having connectivity within the next 4 years.

This communications infrastructure provides the Central Coast with a key advantage in terms of connectivity and access to markets. Anecdotal evidence already suggest a number of businesses relocating to the region (or expanding) to utilise the capacity provided by the NBN.

The National Broadband Network presents a significant advantage to the Central Coast region, which was identified in late 2011 as one of the first roll-out locations. Work has commenced on roll-out activities at two key locations on the Central Coast (via the telephone exchanges at Gosford City Centre and Killarney Vale/Long Jetty). The first connections in these locations became available in early 2013 and the rollout will continue progressively.

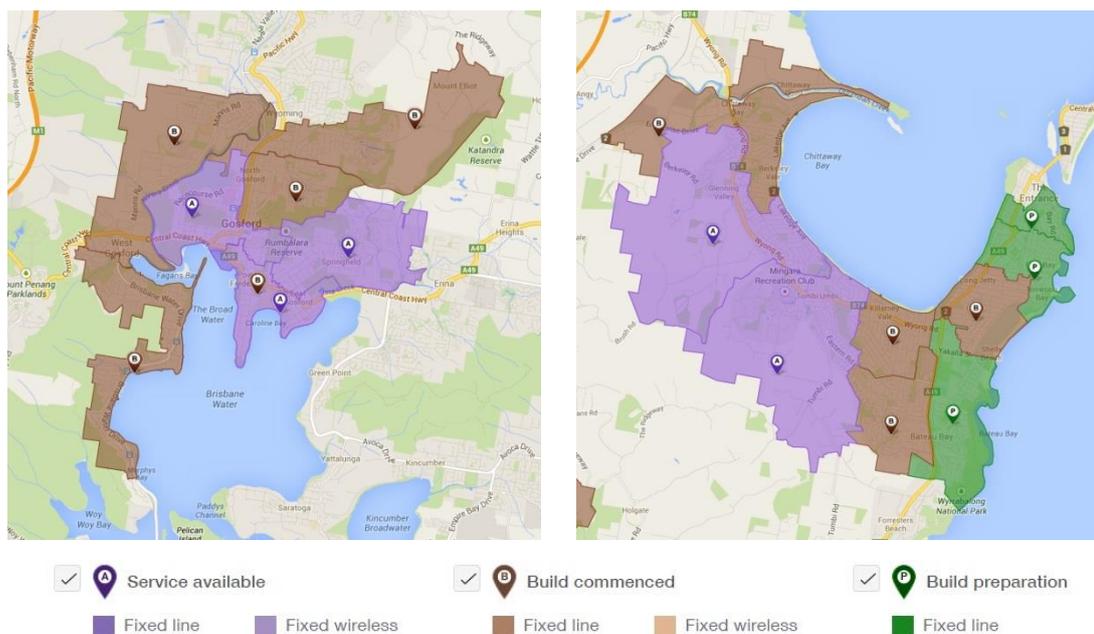
The National Broadband network will have significant potential for growth in all manner of business – including e-health, teleworking and online education activities. The Central Coast already has an IT industry that is known to be innovative and well linked to research and production of software. The progressive rollout of the National Broadband Network across the region will provide potential for growth in these existing industries, as well as benefits to a wide range of business activities.

As in the rest of the world there is an increasing trend toward accessing internet for personal and business use in the Central Coast with statistics of those connected to the internet rapidly increasing.

The NBN is considered to be a “game changer” that will make teleworking a real option for Central Coast employees by reducing travel times while still providing access to job opportunities wider afield. NBN technology also presents a multitude of training and employment opportunities, especially for young people.

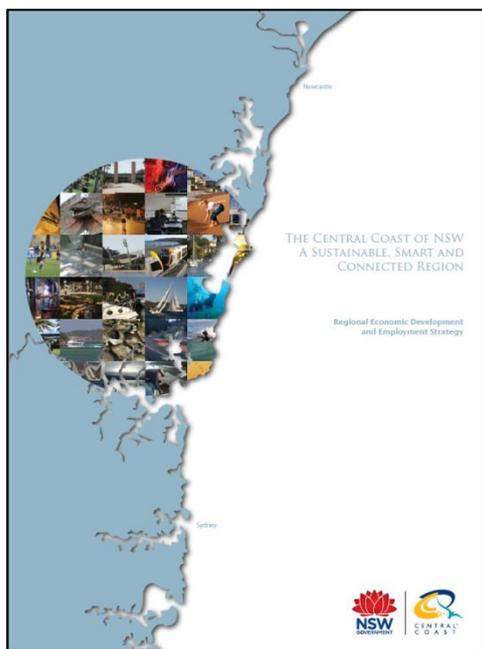
It is expected that companies will be attracted to digital infrastructure, and there will be opportunities for the Central Coast to develop additional smart hubs. Data centre facilities and specialised ICT companies already located in the Central Coast are working to ensure that Wyong Shire is well positioned to take a leadership role.

**Figure 21 - Broadband Rollout as at Aug 2014**



## Regional Networks and Industry Clusters

### Regional Economic Development and Employment Strategy



The development and implementation of the NSW Central Coast Regional Economic Development and Employment Strategy (REDES) demonstrates the direct benefit of the unprecedented regional collaboration between the three levels of government, business and the education sector and has been recognised as an outstanding regional collaboration model that has the ability to be replicated nationally in similar Outer Urban areas.

These strategies are implemented through activities outlined in 18 month Rolling Action Plans (RAP). Each strategy has a Strategic Implementation Group of key stakeholders who collaborate to drive the outcomes in the Rolling Action Plan.

As the catalyst for driving innovation and collaboration in our region REDES is led by an Executive Committee chaired by the Minister for the Central Coast and includes the General Managers for our local Councils, RDACC and DPC providing secretariat support.

The success of REDES is due in part to the high level support for a collaborative a-political approach to regional development.

### Innov8 Central

RDA Central Coast continues to partner with Innov8 Central, providing financial and in-kind support, to implement the Central Coast Innovation Plan.

The Innovation Plan was developed by regional stakeholders with the core aim to improve the quality of life for Central Coast residents by improving the quality of the regional economy.

The Innovation Plan is made up of four key programs:

1. **The Innovation Champions Program** – educating regional business and stakeholder representatives to be more innovative. To date, 30 participants have completed the full program and 30 participants have completed the one day workshop, delivered by Dr Anton Kriz of the University of Newcastle.
2. **The Cluster Program** – contributing to the development of regional clusters including manufacturing, telework, music, social enterprise and food. Music and manufacturing in particular have gained independence as clusters by having their own boards, websites, events, business plans and strategies. Telework has had three committees: project, strategy and research working towards the development of a major telework strategy for the region.
3. **The Gazelle Network** – this has not yet commenced but will be aimed at supporting high growth regional businesses;
4. **The Monitoring Program** – a program of qualitative and quantitative research, including a representative region-wide telephone survey of 300 businesses and qualitative, case-study interviews were completed in May 2013

## Comparative Advantage and Business Competitiveness

### Regional Arts, Creative and Sporting Industries

At regional and local planning levels there is significant emphasis on developing facilities and programs to enhance quality of life and ensure long-term sustainability of communities, especially in the context of substantial population growth.

#### Performing Arts

Laycock Street Community Theatre is the largest tiered seating venue in the region, attracting a diverse range of productions, while the Peninsula Theatre is an intimate venue that's home to Woy Woy Little Theatre. Along with the Wyong Musical Theatre Company and Lizottes Restaurant there is a range of high quality performing arts groups on the coast.

Wyong Shire Council is replacing the old Wyong Memorial Hall with a \$12.7m Performing Arts and Conference Centre. The Art House is being built to meet a critical need within Wyong Shire to have a suitable venue for both amateur and professional performing arts groups to utilise. The Art House construction will start in October 2014 and is expected to finish in December 2015.

The Central Coast Regional Development Corporation (CCRDC) and Gosford City Council have also proposed the development of a Regional Performing Arts Centre and Conservatorium as part of the redevelopment of the Gosford CBD.

#### Gosford Regional Gallery and Arts Centres

The Gosford Regional Gallery and Arts Centre is one of the Central Coast's leading tourist attractions, and features the Gosford / Edogawa Commemorative Garden. Other galleries include [The Toukley & Districts Art Society](#), [The Ken Duncan Gallery](#) and the [R a Stanley Gallery](#).

#### **Heritage**

Heritage assets include the Alison Homestead Museum, Norah Head Lighthouse , Hargraves House and the Henry Kendall Cottage in West Gosford.

**Figure 22 - Gosford Regional Gallery and Arts Centre**



## Events

The Central Coast hosts a diverse range of events with more than a 100 organisations and small businesses actively engaged in a range of activities. Some of the regions more prominent events include:

Australia Day Lantern Parade,

5 Lands Walk

Harmony Day

Toukley Rotary Club's Central Coast Festival of the Arts

Wyong Shire Council Photographic Competition

Wyong-based theatre groups that have up to six productions each year

Central Coast Country Music Festival at The Entrance, which attracts about 25,000 visitors each year

Gathering of the Clans at Toukley, which attracts about 15,000 visitors each year

Beachside markets

## Sportsgrounds

There are more than 70 sportsgrounds located in the Central Coast region catering to winter and summer sport, school groups, as well as casual users.

There are 17 skateparks and two BMX Tracks within the Central Coast region - all have varying features and are suited to all skill levels.

**Figure 23 - Terrigal Rugby Club**



## Regional Competiveness

The Council of Australian Governments (COAG) set a framework for regional economic development based on the determinants of long-term regional growth.

This framework provides a common lens through which regions can consider regional development.

The RDA Central Coast has recently grouped the Regional Australia Institute's competitiveness indicators that constitute the index and included indicators from the *MyRegion* website to complement the regional overview.

Central Coast values and national rankings are provided in the table below and represent the early findings of the analysis.

The national ranking is based out of 55, representing the 55 Regional Development Australia regions.

**Table 10 - Regional Competiveness**

Indicators	Source	Date	Frequency	Central Coast	
				Value	National Ranking /55
<b>HUMAN CAPITAL (EDUCATION AND SKILLS)</b>					
<b>Human Capital</b>					<b>9</b>
University qualification (% of working age population with university quals)	ABS Census	2011	5 yrs	14.90%	23
Technical qualification (% of working age population with certificate and diploma)	ABS Census	2011	5 yrs	40.30%	4
Lifelong learning (% of working age population participating in education and training)	ABS Census	2011	5 yrs	48.10%	7
Early school leavers (% of adult population that did not complete year 12)	ABS Census	2011	5 yrs	58.30%	32
Health (Adults with at least one of four of the risk factors of smoking, harmful use of alcohol, physical inactivity and obesity)	ABS Census	2011	5 yrs	57.80%	24
English proficiency (% population)	ABS Census	2011	5 yrs	95.10%	13
Early childhood performance (% of children developmentally vulnerable)				22.90%	21
Primary school performance (% students in top 2 Bands)				37.00%	10
Secondary school performance (% students in top 2 Bands)				22.70%	18
<b>SUSTAINABILITY (SOCIAL, ECONOMIC, ENVIRONMENTAL)</b>					
Population	ABS	2011	5 yrs	321,685	n/a
Population growth	ABS	2011	5 yrs	0.83%	n/a
Population age 0 -14*	ABS	2011	5 yrs	19.2%	n/a
Population age 15 - 65*	ABS	2011	5 yrs	62.1%	n/a
Population age 65+*	ABS	2011	5 yrs	18.7%	n/a

Indicators	Source	Date	Frequency	Central Coast	
				Value	National Ranking /55
<b>Labour Market Efficiency</b>					<b>44</b>
Unemployment rate				6.90%	47
Young unemployment				14.90%	48
Participation rate				73.20%	37
Skilled labour				26.90%	39
Welfare dependence				18.70%	23
<b>Economic Fundamentals</b>					<b>34</b>
Building approvals (Value of building approvals per capita ('000))				\$0.24	17
Wage/labour costs (Average wage and salary income)				\$42,849	26
Business confidence (Confidence levels in the prospects of business over the next twelve months)				3.32	7
Salary income growth rate*		2009		5.74%	n/a
<b>Essential Services</b>					<b>11</b>
Access to tertiary education services (% of working age population attending university or another higher education institution)	ABS Census	2011	5 yrs	4.70%	20
Access to technical or further education (% of working age population attending technical or further education institutions)	ABS Census	2011	5 yrs	3.60%	17
Access to primary education services (Distance to nearest primary school (km))	MySchools data			1.3	8
Access to secondary education services (Distance to nearest secondary school (km))	MySchools data			5.5	15
Access to hospital services (Number of people employed in hospitals in a region per resident population)	ABS Census	2011	5 yrs	0.0136	32
Access to allied health services (% of workforce employed in health services (excluding hospitals))	ABS Census	2011	5 yrs	13.20%	6
Access to GP services (Number of GP services per capita)	Public Health Information Development Unit			6.1	5
Police services (Number of people employed in police services in a region per resident population)	ABS Census	2011	5 yrs	0.0022	32
<b>Institutions</b>					<b>42</b>
Public service (% of workforce employed in the public service)	ABS Census	2011	5 yrs	5.90%	27
Local government expenditure (Expenditure per capita)	State Grant Commissions			\$972	33
Development applications (Median processing time)	NSW Gov			45	12

Indicators	Source	Date	Frequency	Central Coast	
				Value	National Ranking /55
Regional government influence at state/national level (Business perspectives, higher value for higher influence)				2.85	3
Transparency of local government policy				2.35	8
Clear roles and responsibilities in regional governance (Clarity of which State or Federal government agency that has responsibility for issues that affect my business)				3.17	4
Financial burden of local government (Costs of services provided by the Council, and costs of compliance with council regulations)				n/a	n/a
Local government assistance for businesses (Level of Council assistance to your business)				2.57	8
<b>Natural Resources</b>					<b>20</b>
Mineral resources (% local workforce employed in mining)	ABS Census	2011	5 yrs	0.50%	41
Timber resources (% local workforce employed in logging)	ABS Census	2011	5 yrs	0.00%	41
Commercial fishing and aquaculture (% local workforce employed in aquaculture and fishing)	ABS Census	2011	5 yrs	0.04%	27
Coastal access (Distance to and from region's population centre to nearest coast (km))	GIS calculations			12.1	10
National Park (Distance to and from a national park from the region's population centre (km))	GIS calculations			8.6	1
Net primary productivity (Rate at which all the plants in an ecosystem produce net useful chemical energy)	ABARE			4.8	25
<b>ACCESS TO INTERNATIONAL, NATIONAL AND REGIONAL MARKETS</b>					
<b>Market Size</b>					<b>21</b>
Business turnover (Value of business turnover (with SA4))	ABS Census	2011	5 yrs	\$7.1Bn	25
Working age population (Number of working age residents (within SA4))	ABS Census	2011	5 yrs	192,183	17
<b>Infrastructure</b>					<b>11</b>
Aviation infrastructure (distance to and from region's business centre to nearest airport )	GIS calculations			53.8	29
Port infrastructure (Distance to and from region's business centre to nearest port (km))	GIS calculations			48.5	15
Road infrastructure (Distance from region's business centre to nearest major highway (km))	GIS calculations			4.5	27
Rail infrastructure (Distance to nearest railway station/service (km))	GIS calculations			6.4	4

Indicators	Source	Date	Frequency	Central Coast	
				Value	National Ranking /55
<b>COMPARATIVE ADVANTAGE AND BUSINESS COMPETITIVENESS</b>					
<b>Technological Readiness</b>					<b>13</b>
Internet connection (% of households with internet connection)	ABS Census	2011	5 yrs	62.00%	21
Businesses in technology and related industries (% of workforce employed by technology related businesses)	ABS Census	2011	5 yrs	6.90%	12
Workers in ICT and electronics (% employed as ICT and electronics specialists)	ABS Census	2011	5 yrs	1.90%	12
<b>Business Sophistication</b>					<b>11</b>
Economic diversification	ABS Census	2011	5 yrs	0.05	7
Dominance of large employers	ABS Census	2011	5 yrs	2.80%	10
Exporters, importers, wholesalers (% employed as importers, exporters or wholesalers)	ABS Census	2011	5 yrs	0.19%	13
Income source: Own business (Average Own Unincorporated Business Income)	ABS, Est Personal Income	2009-10		19,464	13
Access to local finance (Number of banks/lending institutions within 50km as a share of total businesses)	Business directory			0.73%	33
Exports (% business sales revenue was earned from exports.)	Expert survey			4.51	4
<b>Innovation</b>					<b>22</b>
Human resources in science and technology	ABS Census	2011	5 yrs	3.30%	18
Research and development managers (% employed as research and development managers)	ABS Census	2011	5 yrs	0.06%	15
Presence of research organisations (% of research organisations out of all businesses)	Innovation Australia			0.00%	29
Expenditure on research and development (average expenditure on R&D per business (\$'000))	Expert survey			3.31	2

(Regional Australia Institute Insight Website, 2014) & (MyRegion, 2014)

Notes: Regional rankings are made following Regional Australia Institute guidelines

## STAKEHOLDER CONSULTATION & PARTNERSHIPS

RDA Central Coast will maintain its key role in promoting discussion and discourse between all levels of government, business and the community on the Central Coast. We will continue to hold 'Focus on the Coast' events, dealing with key issues of significance for the region, and we will involve ourselves in community forums, regional round tables, networking events and the like.

We will continue to support all our partners in establishing and maintaining a strong policy/strategic framework, which provides the basis for future growth and prosperity of the region.

**Table 11 - Stakeholder Engagement and Collaboration Activities**

Stakeholder Engagement and Collaboration Activities		
<p><b>Goal/Objective:</b> To review the current media and marketing activities of RDA Central Coast, establish areas for improvement and mechanisms to add value for money, determine appropriate next steps and engage appropriate consultants to assist where necessary.</p> <p><b>RDA Outcome Area:</b> Enhanced Community Engagement and Consultation</p>		
STAKEHOLDER	FREQUENCY	PURPOSE
Federal Members	Quarterly	Regional Updates, Collaboration Opportunities, Support, Joint Media
State Members	Quarterly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Local Councils	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
NSW Trade & Investment	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Department Premier & Cabinet	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Central Coast Regional Development Corporation	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Central Coast Tourism	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
NSW Business Chamber	Quarterly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Local Business Chambers	Quarterly	Regional Updates, Collaboration Opportunities, Support
Media Outlets	Quarterly	Regional Updates, Collaboration Opportunities
Newcastle University Central Coast Campus	Twice Yearly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Central Coast Area Health	Twice Yearly	Regional Updates, Collaboration Opportunities, Support, Joint Media
TAFE NSW	Monthly	Regional Updates, Collaboration Opportunities, Support, Joint Media
Innov8Central		

## RESOURCES

ABS - Business Register. (2013). *Business register*.

ABS. (2013, Dec). *Australian Regional Labour Markets* . Retrieved from <http://employment.gov.au/australian-regional-labour-markets-publication>

ABS ESP. (2013, June). <http://www.abs.gov.au/>. Retrieved from Estimated Resident Population.

Australian Bureau of Statistics. (2011). *Census of Population and Housing*.

Australian Bureau of Statistics. (June 2014). *Labour Force Survey*.

Australian Government. (May 2014). *Building Stronger Regional Communities: Budget Outcomes 2014–15*.

Buchan Consulting. (2009). *Central Coast Regional Economic Development & Employment Strategy (REDES)*.

Central Coast Research Foundation. (2012). *Central Coast Quality of Life Report*.

Central Coast Tourism. (2014). *Central Coast Tourism Destination Management Plan* .

Central Coast Tourism. (April 2013). *Central Coast Tourism Opportunity Plan* .

Department of Employment. (May 2013 ). *Central Coast Education, Skills and Jobs Regional Scan* .

Department of Planning & Environment. (2014). *Central Coast Regional Growth and Infrastructure Plan Discussion Paper*.

Gosford City Council. ( 2013). *Gosford City Council's Delivery Program 2013-14 - 2016-17 and Operational Plan*.

Gosford City Council. (2010). *Gosford City Centre Masterplan* .

Gosford City Council. (2013). *Gosford 2025 Community Strategic Plan* .

International Monetary Fund. (April 2014). *World Economic Outlook*.

LMIP. (2013, Dec). *Labour Market Information Portal* . Retrieved from Gosford-Wyong Area Profile: <http://lmip.gov.au/default.aspx?LMIP/LFR/NSW/Sydney/GosfordWyong>

MyRegion. (2014, Aug). *MyRegion Website* . Retrieved from [www.myregion.gov.au](http://www.myregion.gov.au)

National Institute of Economic and Industry Research (NIEIR). (June 2014).

NIEIR. (June 2014). *National Institute of Economic and Industry Research*. Retrieved from <http://economy.id.com.au/central-coast-nsw>.

NSW Department of Premier and Cabinet. (Dec 2012). *Central Coast Regional Action Plan*.

NSW Department of Transport. (Dec 2013). *Central Coast Regional Transport Plan*.

NSW Government. (2012). *NSW 2021*.

OCED. (May 2014). *OECD May 2014 Economic Outlook database*.

Organisation for Economic Co-operation and Development. (May 2014). *OECD May 2014 Economic Outlook database*.

Propell . ( Feb 2014). *NSW Economic Overview*.

RDACC. (2014). *Regional Development Australia Central Coast Business Plan* .

Regional Australia Institute Insight Website. (2014, Aug). *Insight Website*. Retrieved Sept 2014, from <http://insight.regionalaustralia.org.au/#>

The Allen Consulting Group. (Dec 2011). *A Feasibility Study for a University on the Central Coast – Final Report*.

Wyong Shire Council. (2014). *Wyong Shire Council Strategic Plan 2014-2018*.

Wyong Shire Council. (2014). *Wyong Shire Economic Development Strategy*.

Wyong Shire Council. (April 2013). *Wyong Shire Community Strategic Plan 2030*.