



**ECONOMIC
DEVELOPMENT
STRATEGY**

DRAFT SUPPLY COUNCIL ENDORSEMENT



MARCH 2020

DRAFT SUBJECT TO COUNCIL ENDORSEMENT

Council Offices 2 Hely St Wyong | 49 Mann St Gosford | 8.30am - 5.00pm Monday to Friday | T 4350 5555 / 4325 8222

centralcoast.nsw.gov.au

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INTRODUCTION

THE CENTRAL COAST IS A REGION OF RICHES AND OPPORTUNITY

Rich in natural assets, economic possibility, culture, community and leadership, we are a destination for living, business, investment, innovation, and recreation.

With this strong foundation, Central Coast has its eyes on the future working to build economic strength and momentum.

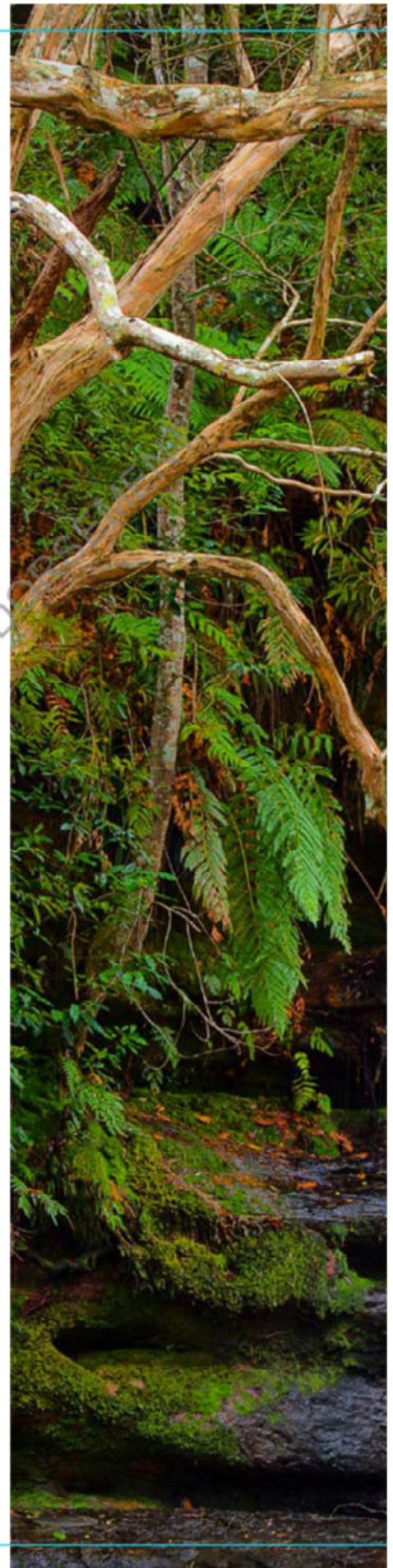
This document, the *Central Coast Economic Development Strategy*, charts our forward course. It sets our economic vision and values, our objectives and targets, and the priority actions to deliver real results for the Central Coast.

As a region, we have significant economic opportunities in front of us – the digital revolution, emerging local industries, smart technologies, a growing innovation eco-system, and a maturing visitor economy. We also face challenges, both local and global – an aging population, youth employment, climate change, and congestion.

The Central Coast is gearing up for the future, ready to face opportunity and local economic challenges with equal vigour. We're committed to more jobs, economic strength, sustainable growth, diversification, local investment, and community wellbeing. This Strategy leads the way for a stronger, more agile, diversified and innovative Central Coast economy.

In the immediate term, we are committed to action. We will coordinate economic policy, investment and collaboration that drives employment, trade, local development, and business. We are likewise committed to enduring effort and focus, working towards a 2040 vision of Central Coast as a benchmark economy in Australia and the world.

In 2040, the Central Coast will be a smart, connected and vibrant region. We will value and promote our natural beauty and heritage, striving for overall sustainability. Infrastructure investment, innovation and local development will drive prosperity. Our economy will be strong, diverse and resilient, delivering opportunity and benefits to our community.





INDIGENOUS ACKNOWLEDGEMENT

We acknowledge the Traditional Custodians and First Peoples of this Land and pay our respects to Elders, past, present and emerging. The *Central Coast Economic Development Strategy* reflects our commitment to celebrating Indigenous culture and enhancing economic opportunities and outcomes for local Aboriginal and Torres Strait Islanders.

BY 2040

THE CENTRAL COAST WILL:



welcome nearly

88,000
new residents



grow the economy by over

\$21BILLION



create over

72,000
new jobs

OUR ECONOMY, YOUR FUTURE

This Strategy aims to build a strong, innovative and resilient Central Coast economy. Our motivation stems from a desire, to deliver benefit and opportunity for people – for residents, youth, business-owners, investors, students, entrepreneurs, visitors, and beyond.

FOR YOUTH

Laura is 17 years old, finishing school, lives on the Central Coast and is exploring future study and career options



Laura: Hey Siri, what is new on Central Coast for young people like me? 😊

Siri: Glad you asked! The new Central Coast Economic Development Strategy aims to make the Central Coast better for youth, with more options to work and study locally, better transport, and new places and spaces for leisure and entertainment.

Laura: But shouldn't I be looking at moving to Sydney or Newcastle?

Siri: Always an option! But if you want to be part of a growing business, innovation, and education eco-system, while having access to the best beaches, less traffic and a unrivaled quality of life, Central Coast should be your home. As a bonus, housing here is actually affordable! 🏠

Laura: An innovation eco-system? What's that all about?

Siri: Lots! But basically, more opportunities for you to start your own business, or work for local start-ups. There are new innovation 🧠 training and pathways, so you can create products and jobs right here on the Central Coast!

Laura: Tell me more about plans for Central Coast entertainment and fun?

Siri: For sure! The Central Coast has a vibrant arts and entertainment scene that is growing everyday – whether you prefer outdoor adventures, markets, night life, live entertainment or just chilling at a cafe ☕ with friend, there's always something to do.

Laura: Our economy is important, but I also care about our environment and our climate.

Siri: Same here! The Strategy takes a 'triple bottom-line' approach to economic development. In other words, we care about our people and our environment as much as we do about modernising our economy

Laura: Great! Thanks for letting me know Siri. Lots to look forward to! 👍



FOR INVESTORS & ENTREPRENEURS

Sam is 45 years old, an entrepreneur, currently lives in Sydney and is looking for a place to locate his new manufacturing business



Sam: Alexa, please search for regions close to Sydney with a dynamic fast growing economy that is led by a clear economic vision.

Alexa: Sure. I've found the Central Coast Economic Development Strategy.

Sam: Tell me what's opportunities are there for investors like myself? 😊

Alexa: The Central Coast has strong niche manufacturing and health sectors 🍷, excellent highway connectivity, low business costs, and access to a highly skilled workforce.

Sam: Very good. So, what will the Strategy do to accelerate local innovation and enterprise?

Alexa: Lots! Highlights include the establishment of an 'Innovation Network', reducing local 'red tape', updating local innovation programs to better meet business needs, and collaborating with key industries to accelerate growth. 📈

Sam: Sounds promising. How will all this economic development be led and coordinated?

Alexa: Central Coast Council will take a leadership role, working closely with the private sector and other governments. Together they will promote Central Coast's economic 'brand', work to secure a City Deal, prioritise high-value economic investment and programs, and enhance engagement with international markets and trading partners.

Sam: And what about future infrastructure 🏗️ for the Central Coast?

Alexa: The Strategy commits to unlock land for development, progress growth corridors, advocate for increased investment, investigate even faster digital connectivity, and prepare detailed, long-term transport and infrastructure plans.

Sam: Thanks Alexa. Please clear my diary for next Wednesday. I'd like to head up to the Central Coast for a quick business trip. Check out the best beaches too – I'm keen to catch a few waves 🌊 while I'm there.



THE BIG PICTURE

This Strategy focuses on economic development for the Central Coast. It also forms part of a much broader policy context, reflecting the wider perspective and aspirations of our region.

LOCAL

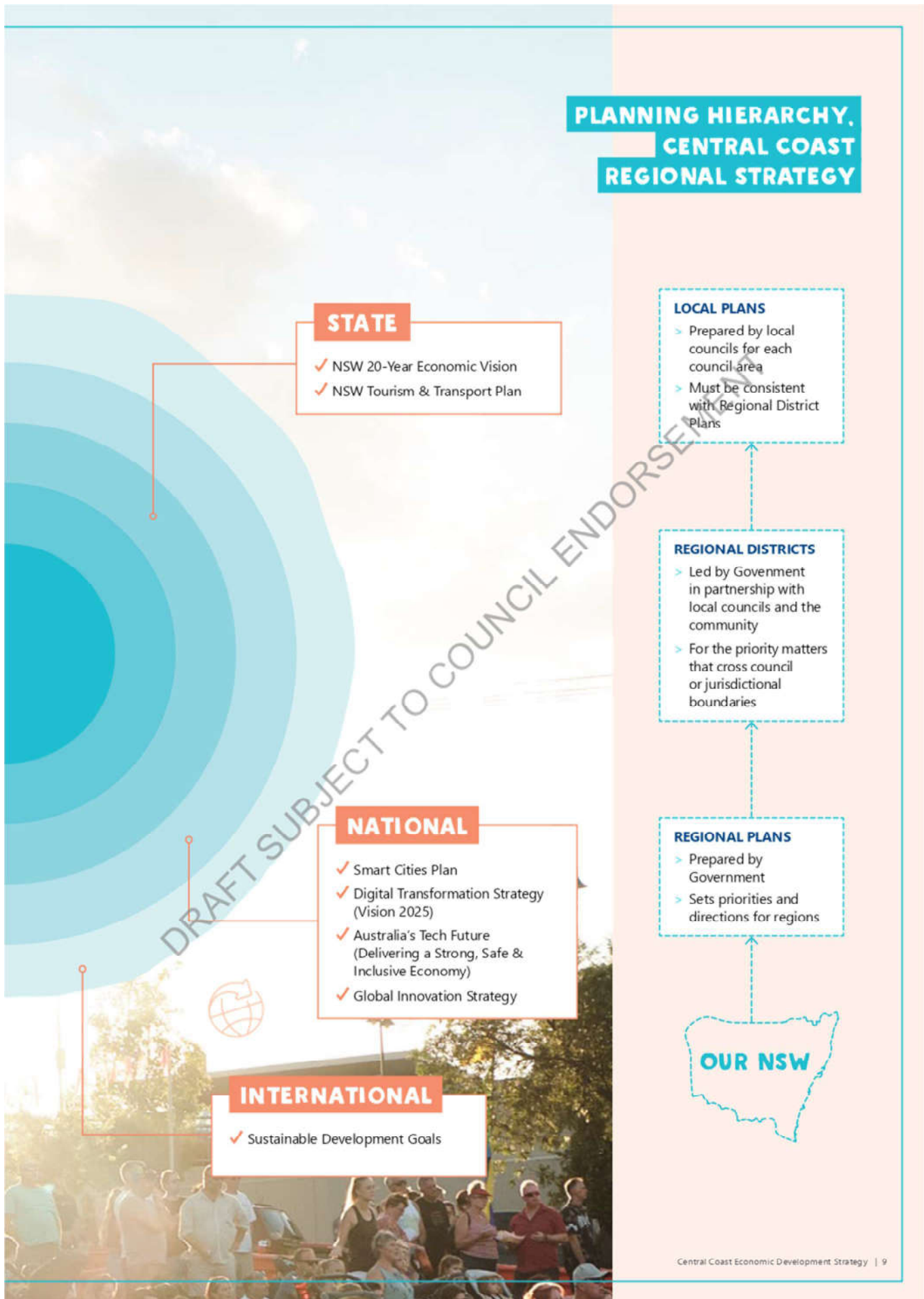
- ✓ One Central Coast Community Strategic Plan (2018–2028)
- For a list of reference documents used to develop this strategy please see *Central Coast Economic Development Strategy supporting document – 2020-2040*.

REGIONAL

- ✓ Central Coast Regional Plan 2036
- ✓ Central Coast & Lake Macquarie Regional Economic Development Strategy (2018–2022)






SUBJECT TO COUNCIL ENDORSEMENT





OUR CURRENT ECONOMY

BY THE NUMBERS

	CENTRAL COAST	GREATER SYDNEY	NSW
POPULATION (2018) 	342,047	5,230,330	7,988,241
POPULATION GROWTH RATE (10 Year Average)	0.9%	1.9%	1.4%
MEDIAN AGE (2017) 	41.8	36.1	37.5
EDUCATION (Bachelor's Degree or Higher, 2016)	14%	32.7%	23.4%
INTERNET ACCESSED FROM DWELLING (2016) 	80.6%	85.6%	82.5%
PARTICIPATION RATE – PEOPLE IN THE WORKFORCE (2016)	56%	66.9%	59.2%
UNEMPLOYMENT RATE (March 2019) 	5.4%	4.5%	4.3%
YOUTH UNEMPLOYMENT RATE	14.6%	10.4%	13.6%
AVERAGE WEEKLY HOUSEHOLD INCOME (2016) 	\$1,595	\$2,118	\$1,889
LOCAL RESIDENTS JOURNEY TO WORK BY PUBLIC TRANSPORT WITHIN THE LOCAL GOVERNMENT AREA. (2016)	2.7%	25.3%	16.0%

Journey to Work (2016)

25.4% | 35,300 people
Commute Outside the Central Coast LGA

68.3% | 95,389 people
Commute Inside the Central Coast LGA

6.3% | 8,828 people
No fixed workplace

Key Industries of Employment (2018/19)

18.7% Health Care and Social Assistance

11.4% Construction

12.3% Retail Trade

8.4% Education and Training

8.9% Accommodation and Food Services

7.3% Manufacturing

Our Local Aboriginal Economy

12,485 Central Coast: **3.8%**
Population (2016) NSW: **2.9%**

Unemployment Rate

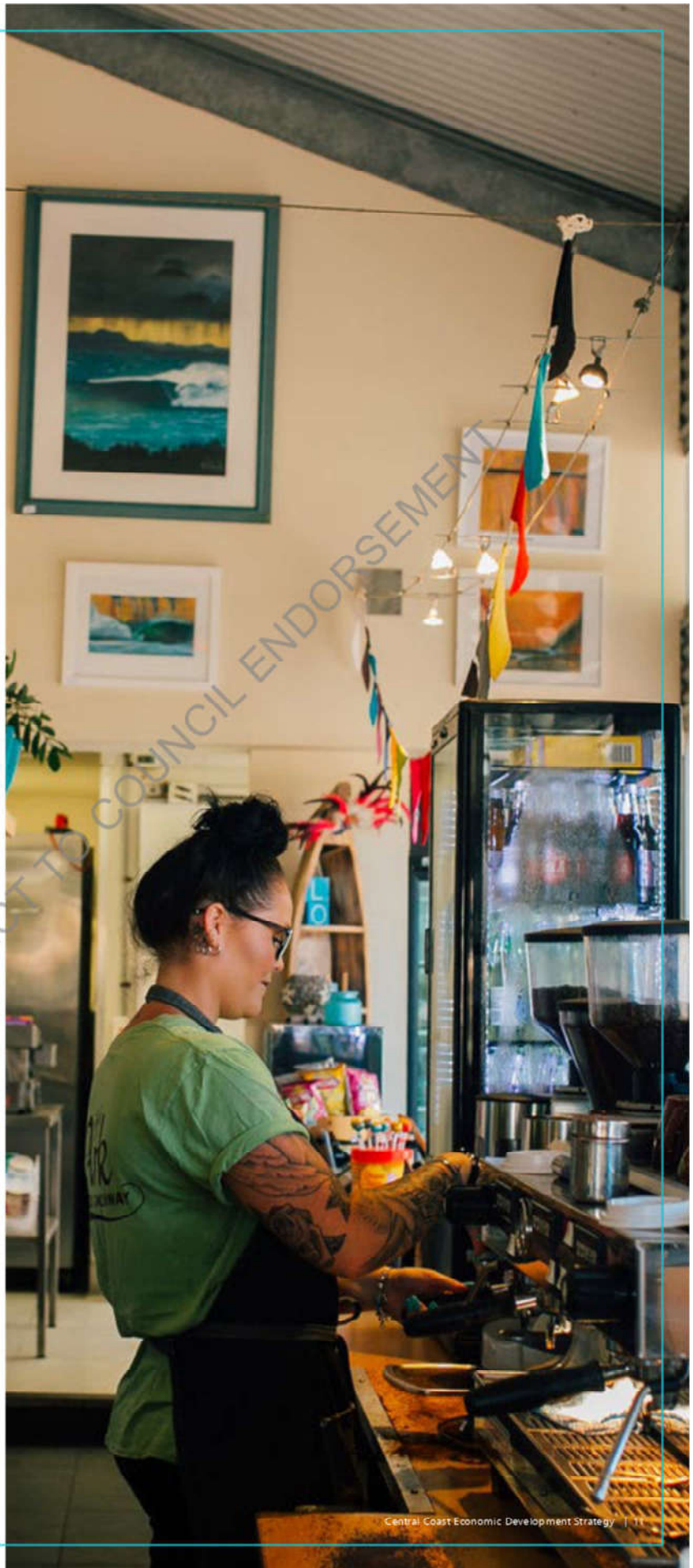
13.8% Central Coast

15.3% NSW

Average High School Completion

30.6% Central Coast

28.4% NSW



MEASURING PROGRESS

In addition to our base 2040 targets, we will benchmark the Central Coast against National Cities Performance Framework, which was first launched by the Australian Government in December 2017. The Framework provides a snapshot of the productivity and progress of Australia's largest 21 cities. It tracks performance across the key measures of: Jobs and Skills; Infrastructure and Investment; Liveability and Sustainability; Innovation and Digital Opportunities; Governance, Planning and Regulation; and Housing.

The Central Coast is not currently included within the national framework measurement; however, the table below provides some comparisons across key areas that indicate performance against Greater Sydney (of which Central Coast forms a part) and also against the State as a whole.

	CENTRAL COAST	GREATER SYDNEY	NSW
Jobs and skills			
Youth unemployment rate (place of usual residence) ¹	14.6%	10.4%	13.6%
Unemployment rate ²	5.35%	4.5%	4.3%
Indigenous unemployment rate ¹	13.8%	11.8%	15.3%
Participation rate ¹	56%	66.9%	59.2%
Gross regional product ⁴	\$13.49 billion	\$422 billion	
Completed high school ¹	40.3%	65%	52.1%
Bachelor's degree or higher ¹	14%	32.7%	23.4%
Housing			
Social housing ¹	3.4%	4.6%	4.4%
Average household income ¹	\$1,595	\$2,118	\$1,889
Proportion of households under mortgage stress ¹	9.3%	8.7%	9.6%
Median house price ⁴	\$690,084	\$1.37 million	\$740,444
Median unit price ⁴	\$491,484	\$876,780	\$676,368
Proportion of households under rent stress ¹	34.8%	26.7%	27.9%
Infrastructure and investment			
Proportion of journeys to work by public transport ¹	2.7%	25.3%	16%
Liveability			
Proportion of people that volunteer ¹	17.2%	18%	18.1%
Languages other than English spoken at home ¹	5.8%	38%	25.1%
Adults that feel safe after dark in their local area ¹	47.1 ASR ⁵ per 100	52%	53.4 ASR ⁵ per 100
Proportion of adults who are obese ¹	32.5 ASR ⁵ per 100	24.5 ASR ⁵ per 100	28.9 ASR ⁵ per 100
Innovation			
Total businesses ²	23,617	N/A	N/A
Households with internet connection ¹	77.3%	88%	78.2%
Planning			
Population ³	342,047	5,230,330	7,988,241
Average annual population growth rate (2008–2018)	0.9%	1.9% (2013–18)	1.4%

Note: 1. 2016 data, 2. March quarter 2019, 3. 2018, 4. June 2018, 5. Age-standardised rate





ENGAGEMENT SNAPSHOT

This Strategy has been shaped by consultation with the community and local stakeholders, both face to face and by digital questionnaires. The top key words identified during the engagement process are listed below:

OUR ECONOMIC DEVELOPMENT VISION – TOP WORDS

Transport/Infrastructure/Housing **41%**

Airport/Aviation **29%**

Lifestyle/Liveability **25%**

Innovative/modern **23%**

Successful/Thriving **19%**

OUR COMPETITIVE ADVANTAGE

Lifestyle and Liveability **78%**

Natural Environment **75%**

Access to Sydney & Newcastle **67%**

Investment in Gosford CBD **47%**

Regional Leadership **33%**

OUR ECONOMIC CONCERNS

Lack of Local Job Opportunity (Commuting) **76%**

Transport & Access **72%**

Opportunities for Youth **57%**

Ease of Movement (Roads) **54%**

Need for Enhanced Entertainment/Leisure Facilities **41%**

OUR BIG OPPORTUNITIES

Encouraging Business Expansion & Attracting New Businesses **70%**

Growing the Visitor Economy **66%**

Leveraging Major Education Facilities **62%**

Taking Advantage of Highway Connectivity **57%**

Availability of Land for Growth **45%**

OUR ECONOMY – IN THE SPOTLIGHT

The Central Coast has a strong and diverse economy supported by natural assets, local infrastructure, and our people. Looking to our future economy, we'll be building on our strengths, addressing key challenges, taking advantage of new opportunities, and managing emerging risks.

STRENGTHS

Food Manufacturing

There are internationally branded food manufacturing businesses that produce on the Central Coast – including McCain Foods, Sara Lee, Mars, Sanitarium and George Weston Foods. The existence of these international brands put the Central Coast on the map for further potential investment and showcases that the region has the right ingredients for supporting big industry.

Natural Assets

The Central Coast has a variety of natural assets including beaches, bushland, lakes and waterways. National parks, state forests, bushland, beaches and waterways occupy over half the region. These assets act as a draw for creative industries and tourism.

Universities and Education

The University of Newcastle (UON) Ourimbah campus, halfway between Gosford and Wyong, is a key asset of the Central Coast. Other institutions including NSW TAFE Ourimbah campus, Central Coast Community College and TLK Community College also provide further education and pathways to employment for youth. These centres will play a critical role in up-skilling our workforce to help meet current and future demands/challenges.

Tourism

Rich in natural beauty, the Central Coast boasts a vibrant Tourism economy, surpassing the \$1 Billion mark for visitor expenditure in the local economy.

Advanced Manufacturing

A considerable amount of employment in the region is centered upon advanced manufacturing such as, food products, high tech software and hardware, fabricated metal products and other specialised manufacturing industries.

Healthcare and Social Assistance

The Central Coast has a high density of care provision compared to NSW. Gosford and Wyong Hospitals ensure the stability of healthcare provision for the region. Additionally, Gosford Medical School and Research Institute is a drawcard for health professionals, and young people seeking training and employment.

Geographic Location and Connectivity

The Central Coast is strategically located 1 hour from both Sydney and Newcastle. Not only does that make it a prime tourism hotspot with its unique geography and distinct natural beauty, it also provides a direct link to Regional, National, and International markets.



HOW WE APPROACH OUR REGIONAL CHALLENGES DETERMINES OUR ECONOMIC STRENGTH



CHALLENGES

Public transport

The Central Coast has a range of mobility and public transport challenges which can constrain local movement and economic opportunity. We must work with our geography, infrastructure gaps and transit affordability to be future-ready.

Our Economic Brand

Central Coast has a vibrant economy and incredible potential, but this 'economic brand' is not yet fully developed and leveraged to attract new investment, talent, and innovation to the region.

Wide Socio-economic Gap

4 out of the 10 Central Coast postcodes ranked in top 10% most disadvantaged, and 6 out of the 10 are ranked in the top 30% most disadvantaged communities in NSW (out of the 621 localities) (APO, 2015).

Land Usage

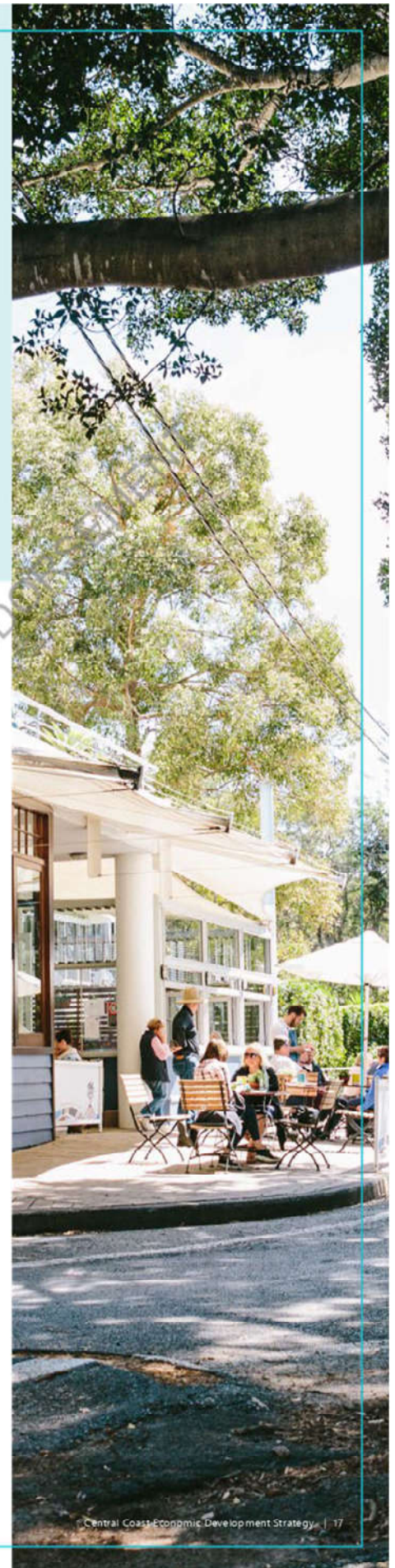
Ensuring conservation outcomes are met as the region develops is integral to maintaining liveability and sustainability. Land use challenges also extend to creating clear, consistent and appropriate land zoning for manufacturing, commercial and housing development.

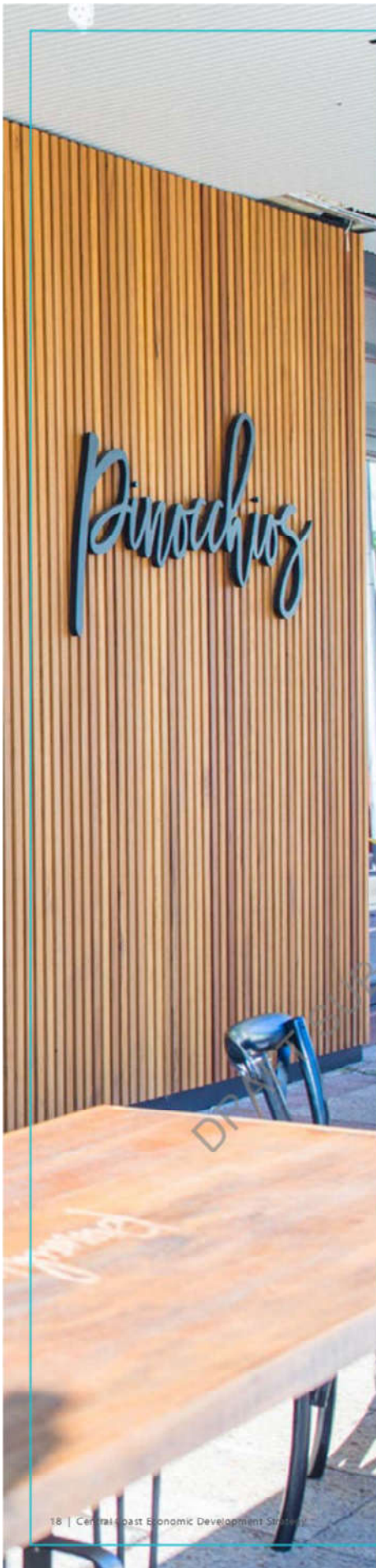
Youth population retention

The median age in the Central Coast is 41.8 years, well above the State median of 37.5. This is reflective of both a high in-migration of retirees coupled with a high out-migration of youth. One challenge will be to retain the youth population, as they are key productive contributors to industry, innovation and new business start ups.

Youth Unemployment

The Central Coast has relatively high rates of youth unemployment, making it difficult to encourage youth to stay in the Central Coast and inhibiting our ability to attract new and emerging talent.





WE CAN MAKE THE MOST OF THE CENTRAL COAST'S UNIQUE OPPORTUNITIES, LIFESTYLE AND ECONOMY

OPPORTUNITIES

A Destination for Relocation

The burgeoning metropolises of Sydney and Newcastle are becoming increasingly unaffordable and congested. Future high-speed rail and Northconnex empowers the Central Coast to be a Regional City home to professionals and young families. The relaxed lifestyle and growing health and care industries, such as the Gosford healthcare precinct, markets the Central Coast as an idyllic place for all.

Education and Training Hotspot

Predicted to be a high growth sector of the NSW and Australian economy, the Central Coast is primed to capitalise. Home to the ever-developing Ourimbah Campus; a partnership between the University of Newcastle and Hunter Institute of TAFE, as well as the Gosford and Wyong campuses of Hunter TAFE.

Tourism – Making CC a Single Destination

The beauty of increased visitation and increased spending saw tourism expenditure increase 22% to over \$1 billion in the year ending March, 2019. Developing a regional destination identity and expanding entertainment and activity prospects, offers the Central Coast an opportunity to increase intraregional exploration, off-peak tourism and a more age diverse tourism profile.

New Business

The Central Coast offers an affordable and connected alternative to Sydney. There is a large amount of land that is already zoned for industrial and business uses that can be better utilised to drive forward development and employment.

Local Aboriginal Community

The Central Coast has a strong Indigenous population, that is supported by the Local Aboriginal Land Councils. We will collaborate with our Aboriginal community to identify economic opportunities to become a unified and inclusive Central Coast region, that celebrates our past, present, and future Aboriginal cultural heritage.

Night Life – Keeping People and Money Local

Community engagement indicates that the Central Coast is looking for a more vibrant nightlife. Specific to the Gosford area, the foreshore, Central Coast Stadium, and the recently revitalised Gosford City Centre are prime locations for further activation. Within all Central Coast town centres, energetic food and entertainment precincts improve liveability and keep money and jobs local. A dynamic Central Coast nightlife will also help retain young people by making the area more appealing and employment more accessible.

Aviation

With a changing NSW airport strategy, we have the opportunity to capitalise on an Airport precinct. Located conveniently 90min from Sydney and 45min from Newcastle, it was identified through the extensive consultation process that investment in niche general aviation could be a catalyst for new growth in a variety of industries including, aviation, manufacturing, maintenance and service operations. Development could fuel and be powered by Central Coast's strong food and metal manufacturing presence and would compliment the recent redevelopment of the Newcastle airport and the establishment of the Western Sydney's Aerropolis.

RISKS

Economic Development Governance & Coordination

There is a recognised need for support from and enhanced coordination between the existing regional leaders involved in economic development. Without the proper governance structure and effective collaboration, the Coast Coast will not meet the targets contained within this strategy.

Uniform Economy

A diverse economy is a resilient and dynamic economy. However, outside of a relatively strong manufacturing presence, the Central Coast economy is highly service industry reliant. The highest employing sectors are Health Care and Social Assistance, Construction, and Retail. This leaves the Central Coast vulnerable to slowing down in population growth and consumption spending that fuel these industries.

Congestion and Service Demand

The Central Coast population is expected to increase 20% by 2040 requiring a substantial evolution of educational, cultural and recreational spaces, health and safety infrastructure, commercial development and transportation options to maintain the Central Coast's liveability. Adding to this is the expected increase in tourism and commuter traffic, the Central Coast attractive lifestyle may be vulnerable.



Emerging Smart Economy

The global economy is moving towards skill dependent and highly connected smart industries. Currently the Central Coast's lower educational attainment levels and ageing population puts it at risk of being left behind. Furthermore, consultation with local business indicated a gap opportunity ranging from semi-skilled to highly skilled in areas such as manufacturing and engineering.

Mortgage Stress and Affordable Housing

With one in ten households with mortgages facing mortgage stress, and over a third of renters suffering from rental stress, housing costs threaten to undermine the wellbeing of those on the Central Coast. As the population continues to increase the upward pressure on prices will likely exacerbate this threat.



Youth Exodus

In the Central Coast, as it is throughout Australia, youth unemployment is significantly above general unemployment levels and the gap is growing further apart.

The Central Coast also faces an aging population as young people leave the region to find recreational and vocational opportunity. Coupled with lower high school and tertiary education completion levels, the region's civic and economic future are at risk.

MOVING THE ECONOMY TOWARD 2040

The Central Coast is a region on the rise. Located in the heart of the fastest growing corridor in NSW, it has the opportunity to become an economic and innovation powerhouse.

The population of the region stretching from northern Sydney to Newcastle, which includes the Central Coast and surrounding areas, is forecast to reach 1.1 million by 2036.

As a metro region located between Sydney and Newcastle, the Central Coast has the unique prospect of attracting large numbers of families seeking a better lifestyle, professionals seeking new employment and investors seeking new opportunities.

Supporting economic growth will require new job creation and infrastructure investment. Creating higher value employment will require new skills and training and higher year 12 completion rates. Creating new local jobs is particularly important as some 25% of employed residents currently travel outside the Central Coast for work.



KEY GROWTH SECTORS TO 2040

Economic indicators for the local region and NSW provide insight into the sectors with the highest growth potential for the Central Coast. Key sectors, both existing and emerging, are noted in the tables to the right.

EXISTING SECTORS TO SUPPORT

Health Care and Well-being

Progressive combination of health, aged care, and retirement professionals and students, supported by modern healthcare facilities and integrated university opportunities, including a Medical School, as well as health precincts and allied businesses.



Retail Trade

Prosperous range of boutique and major retailers in rejuvenated and expanding town centres with opportunities for further redevelopment.

Accommodation and Food Services

Provision of short-term accommodation and food and beverage services to help strengthen the growing visitor economy.

Construction

Diverse range of skilled trades in an expansive construction sector consisting of small proprietor and large-scale corporations, providing specialised construction services throughout the greater regional area.



EMERGING SECTORS TO GROW

Education, Innovation and Research

High-quality academic and technical education institutions that anticipate future economic trends by engraining research and innovation into its core services.

Advanced Manufacturing

Support advanced manufacturing networks to embrace, expand, and innovate their specialised sub-sectors, including food products, high-tech software and hardware, fabricated metal products and other specialised manufacturing industries.

Sustainable Energy and Circular Economy

Establish the region as a circular economy hub and accelerate the production of renewable energy to power the Central Coast economy.



Small Business and Entrepreneurship

Empower small businesses, start-ups, and scale-ups to grow on the Central Coast through an integrated university and innovation ecosystem.

Commercial Offsite CBD Headquarters for Commuters

Develop a strong commercial investment climate for mature businesses to create offsite CBD headquarters for local employees.

Visitor Economy

Unique year-round visitor opportunities including waterfront sporting, cultural experiences, dining and entertainment precincts and festivals, events and conferences.



ECONOMIC DEVELOPMENT OVERVIEW

Developed in collaboration with community, and integrating extensive economic research, this Strategy will ensure that the Central Coast remains a region of unique potential and exciting economic opportunity.

OUR BOLD 2040 VISION FOR A NEW CENTRAL COAST

A choice destination, greater than Sydney... succeeding because of abundant opportunities and incredibly skilled people that thrive on a strong indigenous heritage, natural beauty and unique lifestyle.

THIS STRATEGY IS FOCUSED ON ECONOMIC RESULTS, DELIVERING OPPORTUNITY AND PROSPERITY TO OUR COMMUNITY.

PERFORMANCE DIMENSIONS

Economic & Community Progress, Program & Project Impacts, Programs & Projects, Inputs & Resourcing

OBJECTIVES

- ✓ Improving economic leadership and coordination
- ✓ Advancing economic sustainability
- ✓ Enhancing economic efficiency and competitiveness
- ✓ Increasing community wellbeing
- ✓ Building our profile as an economic destination
- ✓ Enhancing local innovation and enterprise
- ✓ Increasing skills and economic capabilities
- ✓ Delivering infrastructure for the future
- ✓ Fostering economic diversity and vibrancy

STRATEGIC THEMES

-  Coordination
-  Partnerships
-  Infrastructure
-  Innovation and Enterprise
-  Futures
-  Transformation

VALUES

Innovation, Collaboration, Sustainability, Capability, Opportunity, Unity

OUR BOLD 2040 VISION FOR A NEW CENTRAL COAST

A CHOICE DESTINATION, GREATER THAN SYDNEY...

SUCCESSING BECAUSE OF ABUNDANT OPPORTUNITIES AND INCREDIBLY SKILLED PEOPLE THAT THRIVE ON A STRONG INDIGENOUS HERITAGE, NATURAL BEAUTY AND UNIQUE LIFESTYLE

A Central Coast economy where:

LOCALS CAN CHOOSE TO WORK LOCALLY

EVERYONE HAS OPPORTUNITIES

OUR ENVIRONMENT IS VALUED AND SUSTAINED

PEOPLE WANT TO VISIT AND DO BUSINESS

TOURISM AND TRADE PARTNERS ARE WELCOMED

IT'S EASY TO START A BUSINESS

DIVERSITY IS CELEBRATED

INNOVATION AND EMPLOYMENT PATHWAYS ARE ABOUND

INVESTMENT DELIVERS SHAREHOLDER AND COMMUNITY VALUE

CREATIVITY AND PARTICIPATION ARE EMPOWERED







Our Economic Development journey will be guided by the following values and principles.

UNITY

As a Council and community, we are unified in our desire to build a strong Central Coast economy, delivering prosperity and wellbeing. Together we aim to inspire, create, and empower, generating economic synergies and momentum. This Strategy is both a symbol and driver of this unity, reflecting our shared economic purpose and direction.

INNOVATION

Central Coast will encourage innovation, in both our general economic systems and via specific initiatives. We value economic modernisation, including digital transformation, the 'circular economy', and the 'green economy'. We will encourage the emergence of innovative local businesses, products and ideas. We will strive to develop and embrace new technology and innovations that both improve local services and can be exported outside our region.

COLLABORATION

We value collaboration and partnership as a means to harness local creativity, spur innovation and drive economic activity. The Central Coast will encourage broad economic leadership, dialogue and cooperation to enhance participation, build resilience, and advance our economic objectives.



SUSTAINABILITY

The Central Coast values our environment and natural resources for their elemental contribution to health, well-being, and economic activity. Developing an economy that works in tandem with both environmental and social sustainability is a core principle of this Strategy. We aim to deliver prosperity for current and future generations, while achieving quadruple bottom line and addressing environmental challenges which threaten our society and economy.

CAPABILITY

The Central Coast will align its workforce capacity towards our existing and emerging industries. Through education, training, programs, communication, and partnerships, we will be known for our economic capabilities and our ability to adapt and attract high-value industries that are aligned with our people, skills, and innovation.

OPPORTUNITY

The Central Coast values an economy that provides opportunities for all, supports participation and shares prosperity. Expanding local economic opportunities – for employment, enterprise, innovation, inclusion, creativity, wellbeing, investment, and entrepreneurship – will be the guiding principle of this Strategy.

KEY ECONOMIC OBJECTIVES

This Strategy takes a holistic approach to developing the Central Coast economy. Core objectives of our Strategy include:

IMPROVING ECONOMIC LEADERSHIP AND COORDINATION

To prioritise and accelerate economic planning and projects

LONG-TERM KPI'S

- > Community support for local economic policies
- > Efficiency of economic decision making

ADVANCING SUSTAINABILITY

To ensure prosperity and liveability now and into the future

LONG-TERM KPI'S

- > Efficiency of resource usage
- > Greenhouse gas emissions per capita
- > Water and Air Quality

ENHANCING ECONOMIC EFFICIENCY AND COMPETITIVENESS

To drive investment and economic growth

LONG-TERM KPI'S

- > Economic activity and income levels
- > Congestion levels and people commuting
- > Productivity levels
- > Labour market statistics

INCREASING COMMUNITY WELLBEING

To ensure our economy delivers improved quality of life

LONG-TERM KPI'S

- > Measures of economic inclusion/equity
- > Health, safety, justice and social indicators
- > Measures of wellbeing and happiness
- > Workplace diversity profiles

BUILDING OUR PROFILE AS AN ECONOMIC DESTINATION

To attract and retain people, jobs, investment and business

LONG-TERM KPI'S

- > Central Coast brand recognition and perception
- > Inward investment levels
- > Talent retention indicators

ENHANCING LOCAL INNOVATION AND ENTERPRISE

To create new jobs, businesses, knowledge and partnerships

LONG-TERM KPI'S

- > Innovation activity and performance outcomes
- > Business performance
- > Intellectual property measures

THE CENTRAL COAST
ECONOMY WILL BE
DRIVEN BY OUR
COMMITMENT TO
ACHIEVING THE
OBJECTIVES OF OUR
STRATEGY.

**INCREASING SKILLS AND
ECONOMIC CAPABILITIES**

*To expand economic capacity and
future-proof our economy*

LONG-TERM KPI'S

- > Tertiary qualification levels
- > Technology literacy and access
- > Distribution of educational attainment

**DELIVERING INFRASTRUCTURE
FOR THE FUTURE**

*To drive economic growth and
productivity*

LONG-TERM KPI'S

- > Infrastructure investment
- > Building approvals and completions
- > Level and utilisation of infrastructure
- > Commercial office space vacancy rates
- > Industrial Land

**FOSTERING ECONOMIC
DIVERSITY AND VIBRANCY**

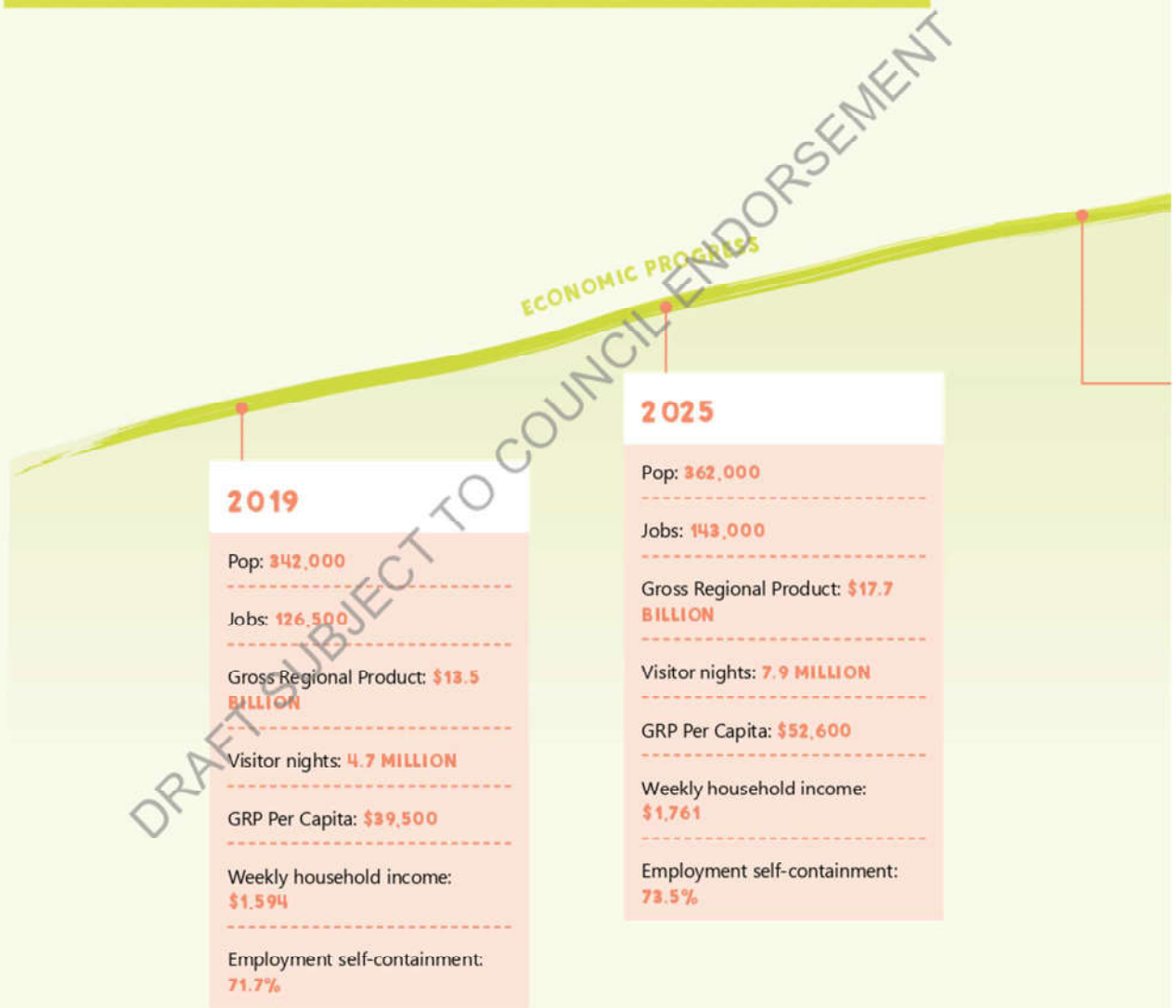
*To increase economic resilience,
visitation, creativity and participation*

LONG-TERM KPI'S

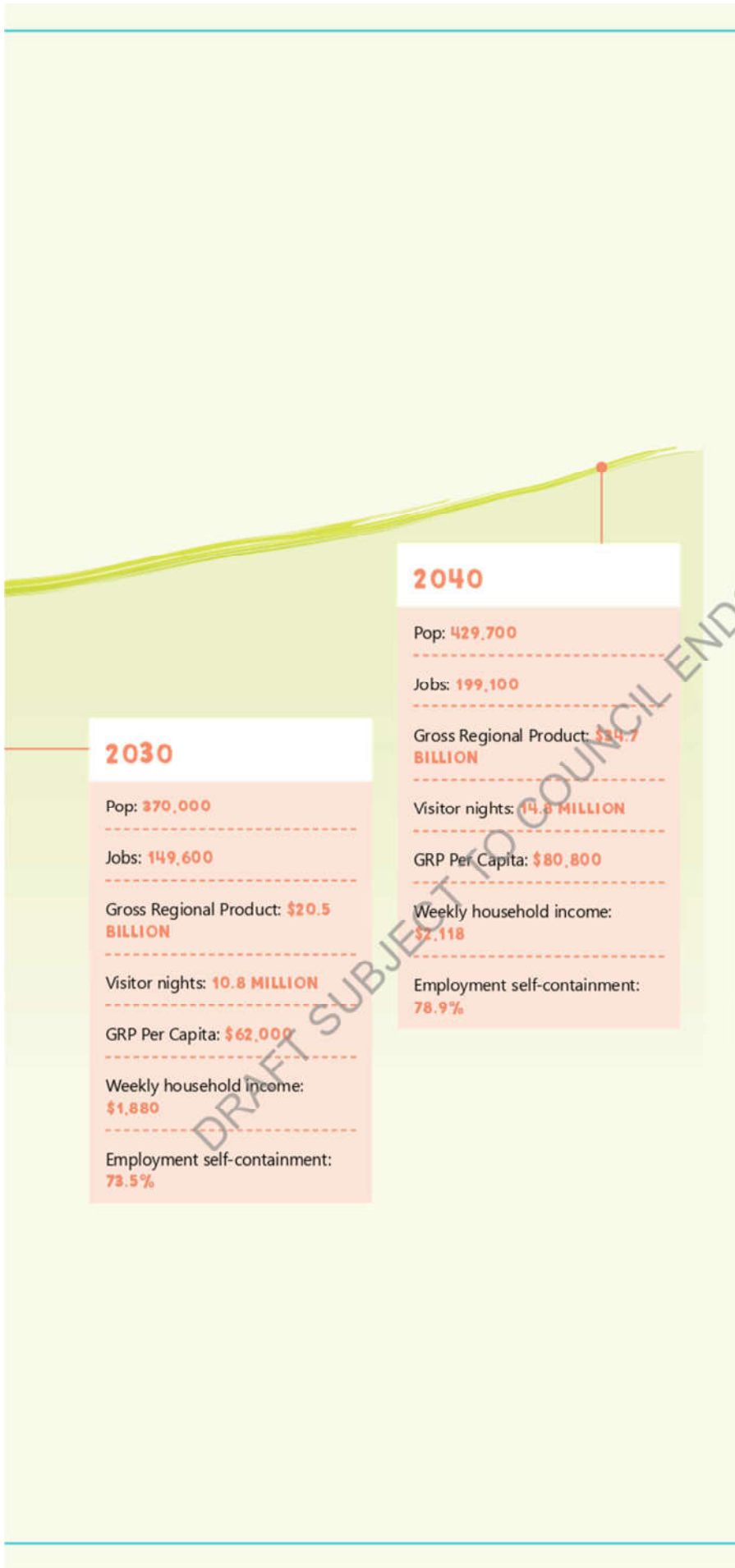
- > Visitor economy statistics
- > Night-time economy and event statistics
- > Economic diversity measures
- > Creative economy measures

LOOKING FORWARD

TARGETING ECONOMIC STRENGTH AND SUSTAINABILITY



Data displayed is real, i.e. excludes inflation



Central Coast Economic Development Strategy | 31

STRATEGIC THEMES & PRIORITY ACTIONS

To deliver this Strategy, Central Coast will focus on six Strategic Themes. This section presents these Themes and the supporting Priority Actions.



ECONOMIC COORDINATION

Effective planning and governance are cornerstones of successful economic development strategies. We are committed to developing best-practice, agile frameworks to lead and coordinate economic development for the Central Coast.

Priority actions include:

- > Update Council's governance and resourcing of its economic development functions.
- > Identify suitably qualified experts and leaders with a range of skills to work with and advise Council's leadership with expert advice and co-ordinating capacity for ongoing Economic Development best practice.
- > Develop a Central Coast Advocacy framework for Council to plan and deliver advocacy to implement identified priorities and drive change in the political landscape to influence public investment, build key relationships and influence policy.
- > Develop a Central Coast Economic Development Marketing and Communication Plan.
- > Explore new options to 'democratise' economic planning and prioritisation by enabling broader community and business engagement.



ECONOMIC PARTNERSHIPS

Collaboration with partners is an economic development catalyst, generating better policies, expanded trade and commerce, new investment, and knowledge exchange. We are committed to nurturing partnerships that deliver economic strength, resilience, and opportunity to the Central Coast.

Priority actions include:

- > Collaborate with all levels of government and the community to secure a City Deal for the Central Coast to support productive and liveable cities that encourage innovation, support growth and create jobs.
- > Develop a regional economic action plan with surrounding councils to leverage economic agglomeration.
- > Collaborate with local industry and community to prepare a Visitor Economy Growth Action Plan.
- > Prepare a roadmap to enhance international economic engagement and trade, working with Austrade and NSW Government.
- > Collaborate with all levels of government to deliver essential services and infrastructure to our growing communities across the Central Coast.



ECONOMIC INFRASTRUCTURE

Physical and digital infrastructure are foundations of economic development, providing vital networks to support investment, trade, innovation and wellbeing. We are committed to building high-value local infrastructure, working with other governments and the private sector to expand the Central Coast's economic capacity.

Priority actions include:

- > Progress growth corridor development strategies
- > Progress development strategies for Urban Release Areas
- > Enhance local infrastructure with 'smart technology' to increase efficiency, connectivity and capacity
- > Prepare a Central Coast Transport Strategy, highlighting priority transport infrastructure projects, over the short and longer term to achieve the 30-minute city
- > Explore options to bring super-fast digital connectivity to the Central Coast (including optic fibre, mobile, and wireless networks)
- > Work with local developers to modernise and streamline planning processes and requirements to future-proof our new developments
- > Develop a dedicated, long-term Central Coast Infrastructure implementation plan to guide local planning and engagement with the State and Federal governments to clearly articulate the need and benefit



ECONOMIC INNOVATION & ENTERPRISE

Local business and enterprise are the drivers of economic development, powering employment, innovation, and investment. We are committed to supporting a thriving business and innovation eco-system, creating new jobs, commercial profit and community value for the Central Coast.

Priority actions include:

- > Work with the local innovation eco-system to establish a Central Coast Innovation Network
- > Start a digital education and accelerator program for all primary and secondary public schools on the Central Coast
- > Establish and partner with Universities to foster collaboration and attraction of new high value industry and to enhance existing established industry
- > Identifying precincts and sectors with high growth prospects, and preparing roadmaps to drive this economic development
- > Develop an internal Innovation Policy Framework for Council
- > Transform Council's innovation and business development programs to enhance local impacts and outcomes
- > Prepare a roadmap to drive economic vibrancy and diversity, exploring options such as events, city activations, better design, place-making, and promotion and utilisation of natural areas
- > Build on existing advanced manufacturing and food innovation to enhance and promote business excellence
- > Prepare a health innovation business case to compliment the growing health economy



ECONOMIC FUTURES

The digital revolution is driving incredible changes to economies and communities the world over, presenting a host of new opportunities and challenges. We are committed to future economy leadership, leveraging digital technology and new economic opportunities for a stronger Central Coast.

Priority actions include:

- > Prepare a Night-Time Economy discussion paper, exploring options for enhancing the diversity and size of our night-time economy
- > Develop and implement a Central-Coast Future City (Smart Technology) road map
- > Work with industry and community to promote 'smart working' (e.g. remote/flexible/co-working) opportunities for the Central Coast
- > Promote programs to improve digital literacy and skills for all primary and secondary public schools and for businesses and the broader community
- > Establish a framework to optimise the economic value of 'big data' for the Central Coast
- > Prepare a youth engagement action plan for enrolment and education to enhance human capital, capacity building, employment opportunities and participation



ECONOMIC TRANSFORMATION

In a fast-paced global economy, retaining competitiveness and meeting changing community expectations depends on continuing economic transformation. We are committed to progressing such reform – of economic systems, regulations, and frameworks – to ensure the ongoing strength and sustainability of the Central Coast's economy.

Priority actions include:

- > Identify high value regulatory reform and 'red tape' reduction initiatives to unlock economic growth
- > Develop a 'Circular Economy' framework to build our sharing economy
- > Explore options to accelerate the production and consumption of renewable energy to power the Central Coast economy
- > Prepare an economic roadmap for the Central Coast to progress the UN's Sustainable Development Goals (SDGs)
- > Prepare a framework to incentivise and attract new high value corporate commercial business and partner with Government, to attract Government institutions to relocate to the region in order to lead the revitalisation of the CBDs and enhance the employment diversity of the region



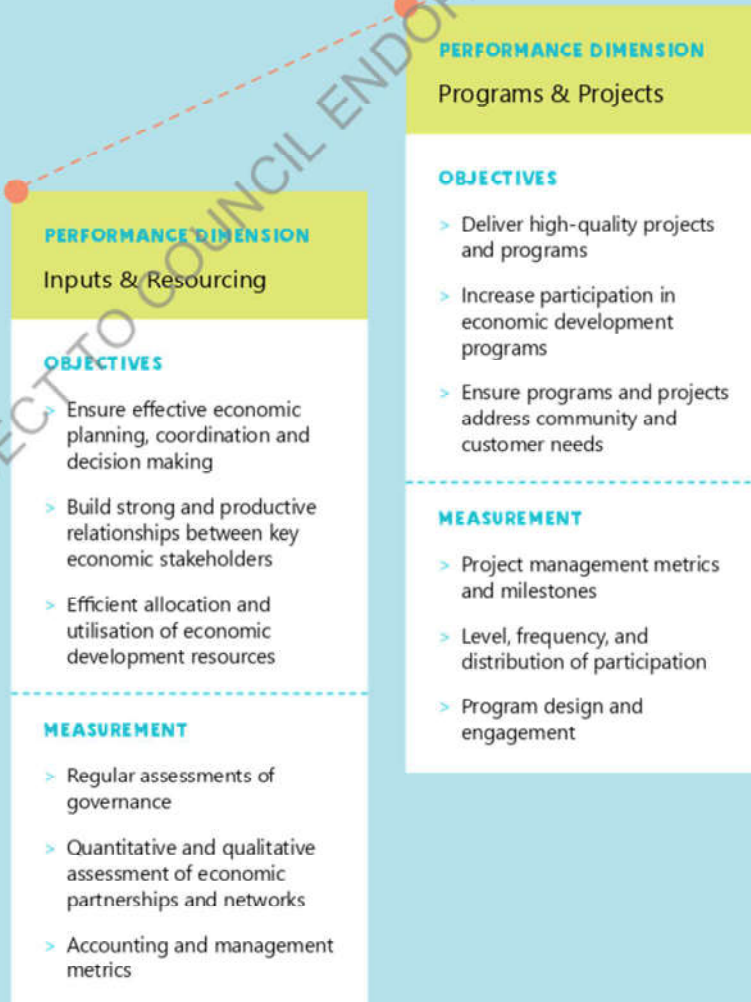
**WE ARE COMMITTED
TO NEW METHODS
OF COLLABORATION,
CONNECTIVITY,
PARTICIPATION AND
INNOVATION.**

EDS PERFORMANCE FRAMEWORK

Ultimately, the success of this Strategy will be measured by long-term economic and community outcomes for the Central Coast. These long-term objectives and key performance indicators are noted on Page 28 of this Strategy.

Success will also be measured by other dimensions of this Strategy, accounting for shorter-term activities and impacts. This includes the efficiency of inputs invested to deliver this Strategy, the quality of economic development projects and programs, and the direct impact or influence of these projects.

This performance hierarchy (or logic) is summarised in the tables to the right. Note that as we move up the performance hierarchy, we get closer to our ultimate economic outcomes, but have less ability to control performance (since long term economic results will be influenced by many other factors beyond this Strategy).



PERFORMANCE DIMENSION
Economic & Community Progress

OBJECTIVES
Build a stronger Central Coast economy which generates and shares prosperity, now and into the future (see Page 28 for full list of objectives)

MEASUREMENT
Economic, social and environmental KPIs (see Page 28)

PERFORMANCE DIMENSION
Program & Project Impacts

OBJECTIVES

- > Improve community and customer satisfaction with economic development programs/projects
- > Increase innovation and entrepreneurial activity
- > Build economic, business and innovation skills and capabilities
- > Enhance the Central Coast's profile as a destination for visitors, business, investment and innovation

MEASUREMENT

- > Feedback and indicators from customer surveys and interviews
- > Quantity and type of innovation activity
- > Level, type and distribution of key skills/capabilities
- > Perceptions of the Central Coast's economy

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Central Coast Economic Development Strategy | 37

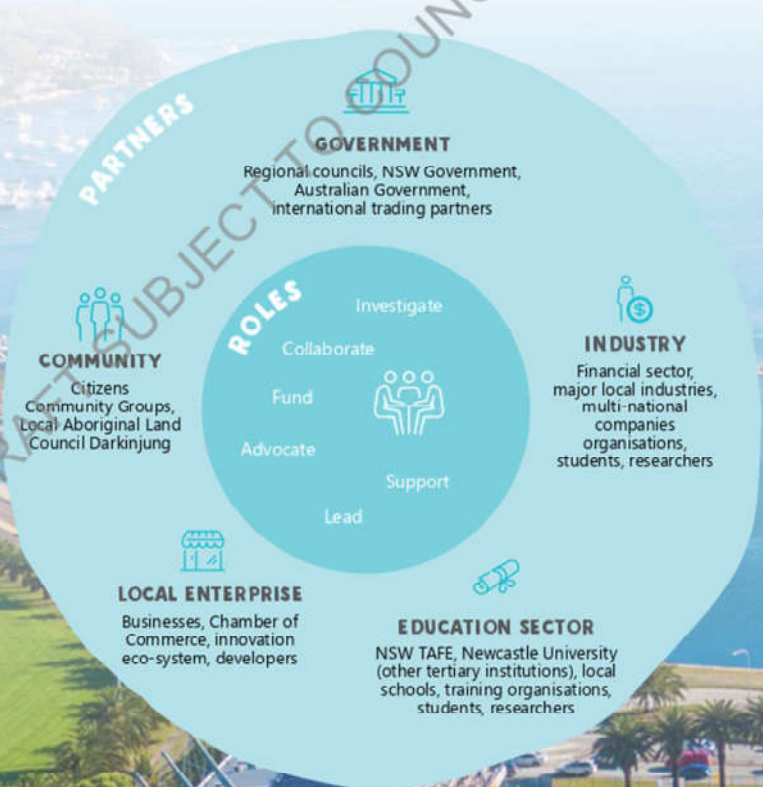
WORKING TOGETHER

Our economic future is in our own hands both collectively and individually. We all have a role to play in imagining and developing the Central Coast economy. We are each a shareholder in our economic future, standing to gain by making our economy stronger, more innovative and sustainable.

Central Coast Council will take a leadership role, as representatives of local residents and custodians of our assets and natural heritage.

However, Council does not control all the economic development levers for the Central Coast. Rather, we will continue to work closely with all parties to optimise economic development, leverage funding, and coordinate investment and action.

This collaboration will be guided by the partnership framework below, which summarises the many partners and the various roles they will play, to drive economic development for the Central Coast.



IMPLEMENTATION OVERVIEW

This Strategy presents our vision and plan for Central Coast economic development. More importantly, we're committed to action, momentum and results. We're dedicated to improving wellbeing for our community through the delivery of a strong, sustainable economy.

To drive real and enduring economic progress for the Central Coast, we will employ a robust implementation framework, summarised in the diagram below. The centrepiece of this framework will be an annual Economic Development Action Plan, outlining priority actions, milestones and accountabilities for progressing this Strategy.



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Council Offices 2 Hely St Wyong | 49 Mann St Gosford | 8.30am - 5.00pm Monday to Friday | T 4350 5555 / 4325 8222

centralcoast.nsw.gov.au



DETAILED SUPPORTING DOCUMENT
2020 - 2040



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CENTRAL COAST 2040

Over the next twenty years, the Central Coast will transform from what it is today, to realise its full potential as a major regional centre.

The change has already begun. Infrastructure projects such as NorthConnex will improve connectivity and reduce travel time, catalysing business opportunities. The Gosford CBD Revitalisation Plan is activity in motion – cranes are in the sky, new, high quality commercial buildings are appearing – there is investment and confidence in future development and growth for the region.

In 2040, the Central Coast is a smart, connected and vibrant region that values and promotes its natural beauty and heritage, encourages and balances development that contributes to the strength and diversity of the local economy and benefits the growing community.

We have broadened our economic base and successfully attracted high value industries representing the health and medical, advanced manufacturing and professional services sectors. Our desirable location, lifestyle and range of employment opportunities have helped to retain and grow our population, which now approaches 430,000 residents.

Further positive impacts of the higher value industries taking up available employment lands are reflected through lower unemployment, higher average household income and higher levels of education attainment encouraged by the opportunities available. The positive attainment across key socio-economic indicators displays levels commensurate with the Greater Sydney region.

A Smart Region

The Central Coast is a Smart Region, where innovation is embraced, promoted and practiced. Our redeveloped centres and new infrastructure have integrated smart technologies and sustainable and innovative design. Our smart region agenda has attracted high-value, knowledge-based industries, created new jobs which has positively impacted everyday life through improved accessibility to information and services.

The \$348 million redevelopment of Gosford Hospital and integration with the university has drawn health professionals and allied businesses to the region, creating further job opportunities across the spectrum. Wyong hospital's \$200 million redevelopment further enhances the capabilities of the health sector, which is amongst the largest employing sectors in the region.

Business and industry, government and education sectors work together to create new pathways to employment across the region's growth sectors, and provide school leavers with multiple options for further education and career futures.

A Connected Region

Travel times between the Central Coast, Sydney and Newcastle have reduced by up to 30% since the introduction of fast rail in 2030, with the soon to be completed high speed rail further cutting transit times to around 30 minutes.

The improved connectivity has encouraged companies to expand and relocate to the Central Coast, taking advantage of lower land development costs and availability, without compromising employee accessibility, leveraging the strong local skill base.

Following successful trials of Demand Responsive Transport (DRT), the scheme has been expanded to provide accessibility to an increased number of transport hubs, ensuring linkages to all employment zones, commercial centres and tertiary education locations.

Guaranteed connection via DRT to the nearest hub/zone does not exceed 15 minutes.

Dedicated autonomous bus/ tramways and cycle paths with share bike stands and charge point traverse the region along central routes ensuring multi-mode travel options.

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY

**A Vibrant Region**

Improved accessibility, environmentally sensitive development and focus on the core attributes of the natural Central Coast has developed tourism into a strong, year-round economic contributor. The waterfront sporting, cultural, dining and entertainment precinct draws regional visitation each week for festivals, events and conferences.

A broad level of quality short term accommodation supports outdoor and nature-based activities along the beaches and national parks, which are a national leader in the development of indigenous tourism activities and education.

A succession of new and redevelopment projects has transformed the waterfront precinct into a major focal point for community, sporting, entertainment, dining and leisure activities. Joining the expanded Central Coast Stadium and Leagues Club is the Central Coast Convention and Exhibition Centre. Short term accommodation supports precinct activity and encourages increased length of stay for visitors enjoying one of the region's most attractive assets.

The establishment of the university health, innovation and entrepreneurship precinct has injected vibrancy and activity into through the assimilation of over 2,500 students into the CBD fabric. Additional investment in nearby residential accommodation has followed, along with café's restaurants, bars and other population serving amenities to support the growing liveability requirements.

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CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



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1. INTRODUCTION

1.1 INDIGENOUS ACKNOWLEDGEMENT

We acknowledge the Traditional Custodians and First Peoples of this Land and pay our respects to Elders, both past and present. The Central Coast Economic Development Strategy reflects our commitment to celebrating Indigenous culture and enhancing economic opportunities and outcomes for local Aboriginal and Torres Strait Islanders.

1.2 OVERVIEW

The Central Coast is a region on the rise. Located in the centre of the fastest growing corridor in New South Wales stretching from the northern edge of Sydney, through to Newcastle. The state projected population along this corridor is estimated to be 1.1 million by 2036. The Central Coast, classed as a Metro Satellite due to its relative proximity to Sydney will become a major economic and population hub over the next two decades, attracting large numbers of families seeking new lifestyle and employment opportunities.

The region has a skilled workforce and a diverse economy, with expertise in healthcare and social assistance, food and housing component manufacturing, logistics, agriculture and construction. The Central Coast has cost-effective access to key consumer markets and export opportunities, with well-serviced road and rail infrastructure as well as strategically located warehousing and freight. Overseas and domestic demand will also support growth in household food manufacturing brands and food production industries. The Central Coast's convenient access to major markets makes it an ideal location for both business and industry.

By 2036, the Central Coast's population is projected to grow to more than 415,000, driving the need for employment and investment in infrastructure (NSW Government, 2018). An ageing population also prevails, with more than 27% of the population expected to be aged above 65 by 2036 (NSW Government, 2018). This will create further demand (and some pressure) for health care and social services, which is already the largest employment sector of the region. Approximately 23% of employed residents travel outside the Central Coast for employment purposes, placing importance on supporting economic growth, increasing skills and training and increasing year 12 completion rates to retain the workforce within the region (NSW Government, 2018).

The Central Coast has identified a range of strengths, weaknesses, opportunities and threats, which are explored further as part of the development of this Economic Development Strategy (EDS). The EDS and implementation plan will ensure the most appropriate approach and framework is employed in meeting the changing needs of regional business, industry and community into the future, and to define targets resulting in improved economic and social outcomes for residents.

1.3 PURPOSE OF THIS STRATEGY

Central Coast Council recognises the challenges and opportunities of growth in the coming decades. Historically, the regional economy has underperformed with lower GRP per capita, higher unemployment and lower educational attainment when compared to Greater Sydney. Many Central Coast residents leave the region for every workday – most of these are higher valued, higher remunerated roles such as those in the professional services sector, because sufficient opportunities do not currently exist locally.

The development and growth of the Central Coast as a true, well connected but individually enabled satellite of a broadening Greater Sydney is effectively mandated within NSW State government planning. The Central Coast will play a pivotal role as a northern arm that provides expansion opportunities and the development of a strong, diversified and innovation driven future economy.

Proximity to Sydney is a challenge and opportunity. The Strategy seeks to highlight the opportunities and mitigate the challenges. The EDS provides a strategic framework to guide Council's decision-making around sustainable economic development initiatives that assist in creating jobs and stimulating the Central Coast economy. Central Coast Council's Economic Development and Project Delivery has developed an economic development strategy (EDS), taking a long-term view through to 2040, but focus on the near term (ten-year) horizon for key actions to progress in the interim to start on the path to the 2040 strategy.

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



The EDS highlights strategies to create a sustainable and increasingly self-sufficient community. It identifies the collaboration and partnerships needed to support a whole-of-Council and community vision for economic development and constructive steps to achieve outcomes.

1.4 APPROACH

The strategy was developed following the compilation of a detailed information base (literature review, socio-demographic and economic modelling) to be tested, informed by and built on through an extensive consultation phase with regional focus groups, one-on-one meetings as well as a Council staff and broader community opinion survey. All this information was compiled to understand the key opportunities presented to the region, the challenges that need to be overcome to realise them, as well as the 'must-have' outcomes for the local community. It is from this information and evidence base that the strategy development framework was developed.

A summary of the key stages in the development of the Central Coast Economic Development Strategy is outlined below:

- Developing a Detailed Evidence Base: Through a detailed literature review, background research and profiling to identify, based on desktop research the competitive advantages and challenges of the region and to be tested and validated in consultation.
- Testing this Data in Consultation: through detailed engagement with the local business and regional community, including:
 - Individual meetings: 17 stakeholders
 - Focus group workshops: 35 attendees
 - Community survey (211 respondents)
 - Central Coast Council officer survey (74 respondents)
- Development of a Strategic Economic Development Framework (Strategic Themes)
- Identification of key game changing initiative that will create an accelerated growth in the regional economic profile
- Reporting around the key strategic themes, the implementation requirements to ensure their success as well as the development of a public facing strategy document, supported by an internal working strategy document and implementation plan.

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2. GUIDING PRINCIPLES

2.1 SUSTAINABLE GROWTH

The Central Coast offers the potential of an attractive lifestyle – a slower than city pace, but with good rail and road accessibility to larger centres and abundant natural beauty throughout the natural bushland, natural waterways and coastline. In addition to the positive lifestyle elements, lower comparative cost of living to other areas within the Greater Sydney catchment has encouraged commuter migration, which will potentially increase as infrastructure projects such as NorthConnex and programmed faster (eventually high-speed) rail improve connectivity even further.

With projected high population growth facilitated through improved accessibility and outward pressures from other areas of Greater Sydney, the challenge for the Central Coast in achieving balanced, sustainable growth is four-fold and can be categorised as per below:

Social:	Ensuring that the provision of services to the community such as affordable housing provision, well planned built environment, cultural and recreation space, health and safety and local transport infrastructure are able to keep pace with development and population growth.
Environmental:	In the face of growth pressures, appropriate measures are required to be taken to ensure the protection of key environmental features, biodiversity, management of waste and water, air quality, adaptation to renewable sources and active management of climate change impacts, including positive initiatives.
Economic:	Population growth requires active measures taken to encourage and facilitate economic growth that will provide employment potential for new and existing residents. This requires development of economic strategies, ensuring provision and availability of suitable industrial and commercial lands, support and provision of vocational pathways, support of local business and attraction of new businesses, as well as ensuring financial sustainability of Council.
Civic Leadership:	Ensuring that Council consults with the residential and business community and adopts policy frameworks that are supportive of growth and the continuance of high levels of service provision. To provide leadership in a listening environment and uphold the ethics and integrity expected by the community, whilst making appropriate decisions that prioritise the benefit and prosperity for all.

2.2 PRIORITISATION OF ECO & SMART INDUSTRIES

The predominant employing sectors for the Central Coast are Health Care and Social Assistance, Construction, Retail and Manufacturing. With the exception of the manufacturing sector, which is broadly (there are obviously exceptions) in decline throughout Australia, population and the demands to service population growth is a key driver of the remaining industries.

In order to diversify the economy and create new employment opportunities in higher value, future focussed industries, the Central Coast needs to actively seek, attract and encourage the establishment of businesses that are less population and household service driven and are exporters of goods and services out of the region.

As a region known for its natural beauty, industries that are environmentally aligned and typically come under the banner of 'cleantech' are an obvious synergy. The sector encompasses activities such as solar and other renewables, energy efficiency, environmentally friendly building materials, waste management, and engineering and consulting services.

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



The manufacturing sector, traditionally strong within the Central Coast still has a significant role to play, with existing companies transitioning to smarter technologies and a concerted effort should be made to both encourage and support this transition, as well as attraction of other advanced manufacturing companies which may range from producing high performance engineered products to functional foods and aerospace components.

The transition of the economy and capture of current and future opportunities is further enhanced through knowledge based industries and professional services, much of which is a current major import to the region. Evidence highlights a high proportion of the outward commuting workforce are employed in these sectors, indicating a strong local skills base that could be available to support local activity. The ability to provide an attractive investment environment and suitable workplace accommodation is a key factor in encouraging both new start-ups and potential relocations.

The development of a Smart Cities framework for the Central Coast will be form integral component of delivering future services and capacity to the residents and businesses of the region and that will act as a catalyst for inward investment and attraction of higher value industries.

2.3 CO-LOCATION AND INTEGRATION OF EDUCATION, TRAINING & JOB GROWTH

With higher than average unemployment and very high levels of youth unemployment experienced across the Central Coast, coordination between all levels of education, training, government and industry is required to adequately address the situation. Consultation with local business indicates opportunities exist ranging from semi-skilled to highly skilled in areas such as manufacturing and engineering. Each sector indicated a shortage of required personnel due to the inability to hire appropriately skilled and educated workers.

Skilling positions is not the only limiting factor constraining growth, transport accessibility is cited as a significant issue for the region – particularly for youth. The education and training sector holds a key position in facilitating improved employment prospects as well as skilling for future roles.

Universities and TAFE institutions are increasingly working together, often in co-located or shared campus facilities and is particularly popular in regional areas. Such is the case with the University of Newcastle and TAFE Hunter and Central Coast Campus at Ourimbah. The campus has a high level of interaction with all levels of government and industry – in this way, opportunities for linking future skilling requirements and provision of suitable learning can be mapped, as well as increasing the relationships between education and industry to engage in research and development, sharing of knowledge and creation of further opportunities that benefit the local economy through attracting additional partnering relationships and encouraged clustering activities.

Assisting, encouraging and facilitating continued engagement and collaboration is a key activity for the Central Coast Council to unlock the potential of relationships.

2.4 ALIGNMENT WITH COMMUNITY PRINCIPLES

One Central Coast (Community Plan) summarises the desired regional outcomes and principles and the 2040 environment and outcome they support. These core outcomes for the community include:

- Belonging
- Smart
- Green
- Responsible
- Liveable.

These community principles are considered and incorporated throughout the Central Coast Economic Development Strategy.



3. CENTRAL COAST OVERVIEW

3.1 REGIONAL OVERVIEW SNAPSHOT

The Central Coast Local Government Area (Central Coast) is located in northern New South Wales, between Sydney and Newcastle. The Central Coast has a large geographical footprint of 168,107 km² and includes the previous local government areas of Gosford and Wyong. Despite the large size of the Central Coast, it loses a significant proportion of its workers each day through a daily commute to Sydney.

Arguably, proximity to Sydney has contributed to dampening development in higher value industries and financial and professional services, which typically are centred closer to high activity and high population areas. As a result, the majority of industry employment is local population and household service based. Comparatively lower industry development and diversification opportunities have resulted in higher than average local levels of unemployment and educational attainment.

Key characteristics of the Central Coast region include:

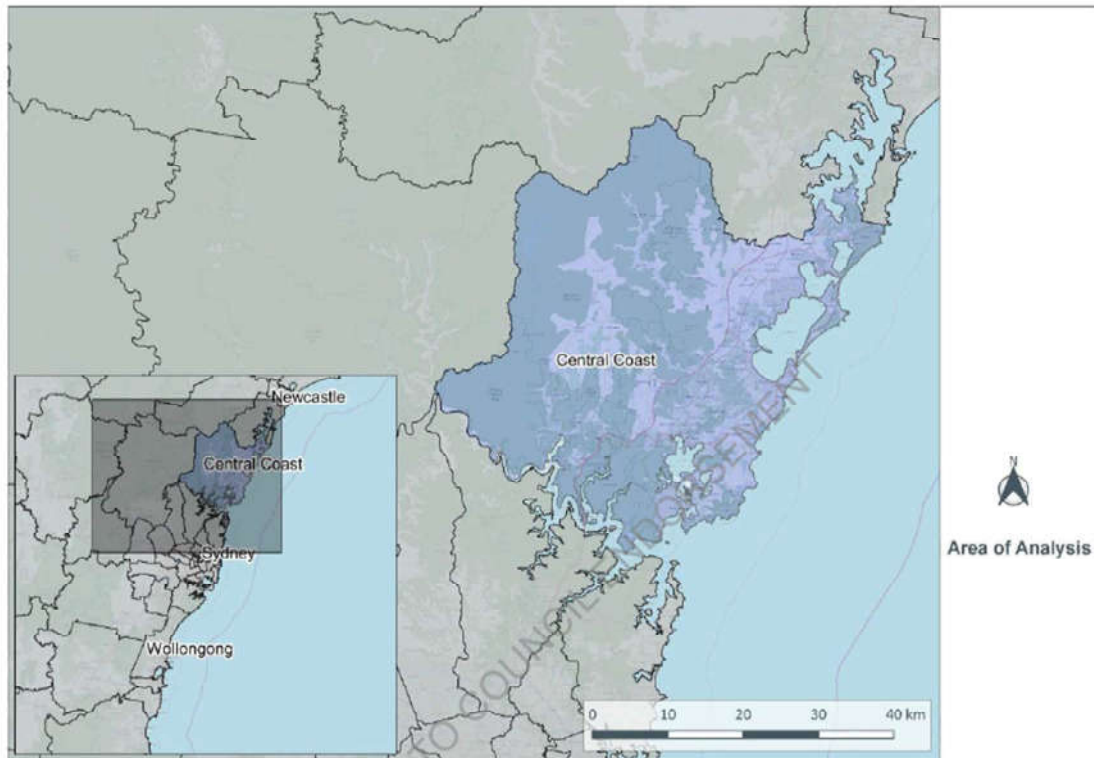
- The Population in Central Coast in 2018 is recorded as 342,047 people.
- The average age in Central Coast in 2017 was 41.8 years, an increase from 2008 at 39.6 years.
- Local Gross Regional Product was recorded at \$13.49 billion in 2018, following a growth rate of 2.8% from 2017.
- The average weekly household income in the Central Coast was \$1,594 in 2016. This is \$295 less than the New South Wales average household income.
- In July 2018 there were 126,459 local jobs in the Central Coast Region (by place of work).
- In 2016, Central Coast has a self-containment rate of 71.7% and a self-sufficiency rate of 91.1%. The other 39,532 employed Central Coast residents travel outside Central Coast to work.

Key Industries by Value (2017/18):	Key Industries of Employment by FTE (2016):
<ul style="list-style-type: none"> • Health Care and Social Assistance (14.5%) • Manufacturing (8.9%) • Retail Trade (7.9%) • Construction (7.8%) • Financial and Insurance Services (6.6%) 	<ul style="list-style-type: none"> • Health Care and Social Assistance (17.8%) • Construction (13.1%) • Retail Trade (10.2%) • Manufacturing (8.8%) • Education and Training (7.1%)
Key Industries of Employment -Total (2016):	
<ul style="list-style-type: none"> • Health Care and Social Assistance (18.3%) • Retail Trade (13.0%) • Construction (10.5%) • Accommodation and Food Services (9.5%) • Education and Training (8.6%) 	

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



Figure 3.1. Central Coast Location



Source: AEC

3.2 SOCIO-DEMOGRAPHIC & ECONOMIC OVERVIEW

3.2.1 Population

In 2018, Central Coast had a population of 342,047 people and had grown by 0.8% from 2008. The Central Coast population has an older age distribution than the state. Persons aged 25-64 years account for almost half the population, and 20.3% of the population were aged 65 and over in 2017. An ageing population is generally associated with increased demand for health infrastructure and aged care accommodation facilities. Population growth estimates suggest the local population is likely to increase to 414,615 by 2036. This represents growth of 20% from current levels, an average annual growth of 1.1%. This growth is likely to support the region's key sectors, which tend to be population-driven.

As at the 2016 Census there were 12,489 indigenous people living in Central Coast or 3.8% of the total population. Approximately 86.2% of indigenous people were employed in Central Coast, a higher proportion than the state which has 84.7% of its indigenous population employed. Indigenous residents in Central Coast also had a higher high school completion rate than New South Wales indigenous population at 30.6% compared to 28.4%, however, this is still lower than the overall Central Coast average of 40.3%.

3.2.2 Gross Regional Product

In 2018, the region recorded Gross Regional Product of approximately \$13.5 billion. The local economy has experienced strong growth since 2015, spurred by the health care and social assistance and construction sectors. Due to the position of Central Coast, the local economy is likely to have a broader servicing population than resident



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY

population, supporting the economy despite relatively weak population growth outcomes in recent years. The most prominent sectors (by total employment) in the economy in 2018 were health care and social assistance, manufacturing and retail trade with all three of these industries having labour specialisation along with accommodation and food services, construction, other services and rental, hiring and real estate services. Despite growing strongly since 2015, Central Coast had a slow 5-year annual growth and is also expected to grow at a slow pace to 2031, growing at 1.0% annually.

3.2.3 Labour Force

In the September quarter of 2018, Central Coast had a labour force of approximately 180,500 people, with 126,459 jobs located in the Central Coast Council area. Central Coast has a higher rate of unemployment than the state, at 5.8% compared to 4.5%. Youth unemployment (for persons aged between 15 and 24 years) is problematic at 14.6%, though this rate of youth unemployment is relatively consistent with other regions of Australia. The self-sufficiency rate for Central Coast is around 91.1%, meaning 91.1% of local jobs are being filled by residents. This suggests that the resident population is appropriately qualified and skilled for the local industry structure. The self-containment rate for the region is around 71.7%, meaning 71.7% of employed residents work locally.

Health care and social assistance had the most variance between total workers and Full Time Equivalent (FTE) workers with 7,831 more workers in total than FTE. Following this was retail trade and accommodation and food services.

3.2.4 Housing

Despite having lower housing costs (for owner occupiers and renters) than comparison areas of Greater Sydney and New South Wales, housing affordability in the region is problematic with almost 10% of households with mortgages experiencing mortgage stress and 35% of renting households in rental stress.

3.2.5 National Cities Performance Framework Comparison

The Australian Government launched the first National Cities Performance Framework on 8 December 2017 (Department of Infrastructure, Regional Development and Cities, 2017). The Performance Framework provides a snapshot of the productivity and progress of Australia's largest 21 cities. The framework tracks performance across the key measures of: Jobs and Skills; Infrastructure and Investment; Liveability and Sustainability; Innovation and Digital Opportunities; Governance, Planning and Regulation; and Housing.

The Central Coast is not currently included within the national framework measurement, nor is all the data from the National Cities Performance Framework available for the Central Coast, however the table below provides available comparisons across the key areas of examination that indicate performance against Greater Sydney (of which Central Coast forms a part) and also against the State as a whole.

Figure 3.2. Smart Cities Benchmarks

Indicator	Central Coast	Greater Sydney	NSW
Jobs and Skills			
Youth Unemployment Rate (Place of Usual Residence) (a)	14.6%	10.4%	13.6%
Unemployment Rate(b)	5.35%	4.5%	4.30%
Indigenous Unemployment Rate (a)	13.8%	11.8%	15.3%
Participation Rate (a)	56.0%	66.9%	59.2%
Gross Regional Product (d)	\$13.49 billion	\$422 billion	\$559 billion
Completed High School (a)	40.3%	65.0%	52.1%
Bachelor's degree or Higher (a)	14.0%	32.7%	23.4%



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Indicator	Central Coast	Greater Sydney	NSW
Housing			
Social Housing (a)	3.4%	4.6%	4.4%
Average Weekly Household Income (a)	\$1,594	\$2,118	\$1,889
Proportion of households under mortgage stress (a)	9.3%	8.7%	9.6%
Median House Price (d)	\$690,084	\$1.37 million	\$740,444
Median Unit Price (d)	\$491,484	\$876,780	\$676,368
Proportion of households under rent stress (a)	34.8%	26.7%	27.9%
Infrastructure & Investment			
Proportion of journeys to work by public transport (a)	2.7%	25.3%	16.0%
Liveability & Sustainability			
Proportion of people that volunteer (a)	17.2%	18.0%	18.1%
Languages other than English spoken at home (a)	5.8%	38.0%	25.1%
Adults that feel safe after dark in their local area (a)	47.1 ASR per 100	52.0%	53.4 ASR per 100
Proportion of adults who are obese (a)	32.5 ASR per 100	24.5% ASR per 100	28.9 ASR per 100
Suicides per 100k people (a)	11.6 Average Annual ASR per 100	8.2 Average Annual ASR per 100	9.8 Average Annual ASR per 100
Innovation & Digital Opportunities			
Total Businesses (c)	23,617	N/A	N/A
Households with internet connection (a)	77.3%	88.0%	78.2%
Governance, Planning & Regulation			
Population (c)	342,047	5,230,330	7,988,241
Average annual population growth rate (2008-2018)	0.9%	1.9% (2013-2018)	1.4%
Proportion of population that is Indigenous (a)	4.6%	1.5%	3.4%
Average Age (e)	40.9 Years	35.8 Years	38.1 Years

Note: (a) 2016 data, (b) March Quarter 2019, (c) 2018, (d) June 2018 (e) 2017
Source: Economy.ID (2019), PHIDU (2018).

3.2.6 Visitor Economy

Tourism is a key potential growth sector for the region with tourism and hospitality accounting for approximately 7.9% of Gross Value Added in 2017/18 and 7.1% of employment. In the year ending July 2018 there were just over 5.1 million visitors to the Central Coast, the second most since 2007-08. The majority of visitors were domestic day trippers accounting for almost 70% of visitation however this is a decline in the proportion of day trip visitors that the region has seen historically averaging 71.8% of visitors since 2007-08. Domestic overnight visitors from within New South Wales accounted for approximately a quarter of visitors. Domestic overnight interstate visitors accounted for just 3.8% of visitation whilst international visitors comprised 1.3% of visitors. International visitors have increased their share of visitation from 0.7% in 2012-12 to 1.3% in 2017-18.

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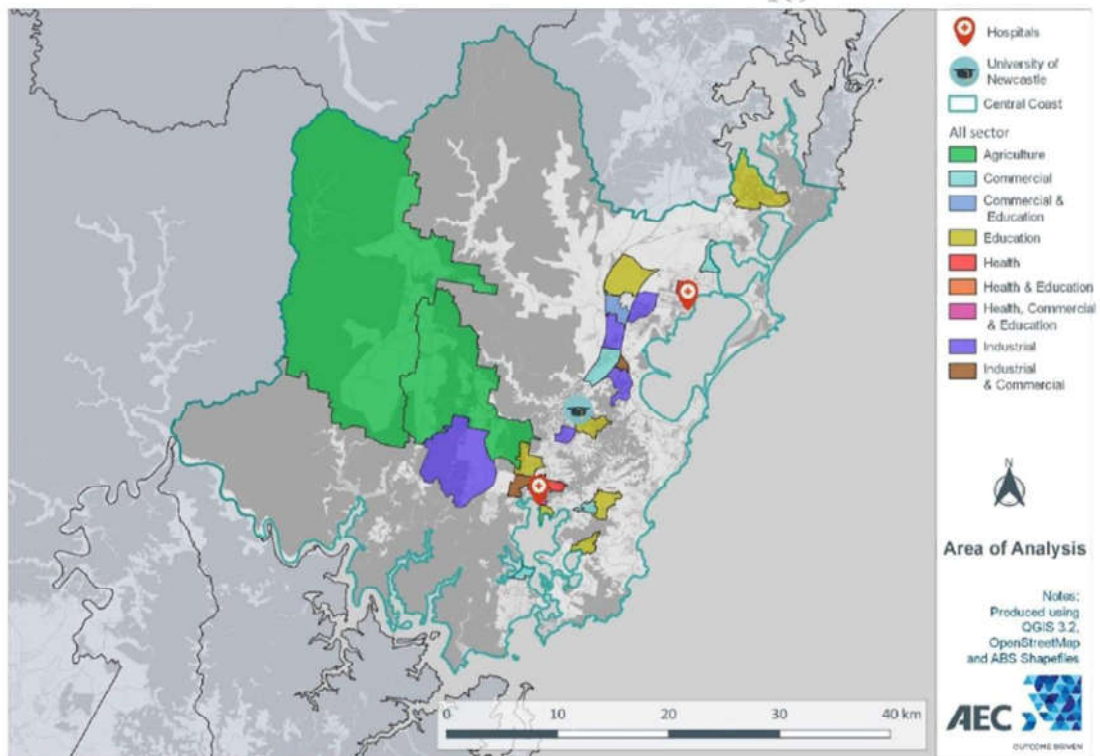


3.3 ACTIVITY PRECINCTS & KEY EMPLOYERS

Figure 3.3 outlines the key activity precincts and major employers within Central Coast, which include:

- **Central Coast Local Health District:** The recently redeveloped Gosford Hospital is one stage of the improvements to Central Coast health with a further \$72.5 million expansion for a Medical School and Research Institute, partnered with the University of Newcastle. This will increase jobs and opportunities for medical professionals to come to Central Coast, whilst also bringing spouses who could potentially be working with in the professional services industry.
- **University of Newcastle (UON):** The University has a strong commitment to the region and works closely with the two of the region's key employers (amongst others), an MOU for the CC Food Innovation Region Strategy and the Central Coast Local Health District.
- **Food Manufacturing Precincts:** There are internationally branded food manufacturing businesses that produce on the Central Coast - these include McCain Foods, Sara Lee, Mars, Sanitarium and George Weston Foods.

Figure 3.3. Activity Precinct Map, Central Coast



Source: AEC.

3.4 STRATEGIC ASSETS

Key strategic assets in the region include:

- **University of Newcastle (UON):** The Ourimbah campus, mid-way between the centres of Gosford and Wyong is a critical part of the future fabric for the Central Coast, providing further education and pathways to



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employment for youth, as well as opportunities for continued learning and up-skilling of current workforce which will help to meet the challenges of future demands.

- **Food Manufacturing:** There are internationally branded food manufacturing businesses that produce on the Central Coast - these include McCain Foods, Sara Lee, Mars, Sanitarium and George Weston Foods. Clustering of businesses such as these sends a clear message to the industry that the Central Coast region has the required support networks (university research, collegiate businesses) and attributes to support one of the most dynamic industries within the manufacturing sector. CC Food Innovation Region Strategy
- **Fabricated Metal Product Manufacturing:** There is a strong cluster of fabricated metal product manufacturing in Central Coast with a considerable amount of employment in structural metal product manufacturing. This is a strong industry and a key strategic asset for Central Coast.
- **General Aviation Airport:** Central Coast Airport is a small aircraft landing area owned and operated by Central Coast Council. It is located in Warnervale and is approximately 90 minutes' drive from Sydney and 45 minutes' drive from Newcastle. The runway at Central Coast Airport is sealed and is suitable for small private aircraft, charter aircraft and other users including helicopters.
- **Natural Assets:** Central Coast has a variety of natural assets that they can utilise including beaches, bushland, lakes and waterways. National parks, state forests, bushland, beaches and waterways occupy over half the region which can be a major drawcard for people moving or visiting the area.
- **High Speed Rail from Wollongong to Newcastle:** The proposed high-speed rail trainline will create a significantly faster transportation method connecting the Central Coast to Sydney. The current rail time from Sydney to Gosford is 1:19 hours with the high-speed rail expected to have an approximate travel time of 0:30.

3.5 LOCAL CHALLENGES

While the Central Coast NSW has many strengths and competitive advantages, there is also a range of challenges and limitations that need to be addressed and mitigated. A brief overview is included below.

3.5.1 Socio-Demographic Disadvantage

The Dropping off The Edge (2015) report shows the persistent communal disadvantage in the NSW Central Coast region, using 22 indicators. This analysis clearly shows that the NSW Central Coast has pockets of severe disadvantage, particularly in the 2262 & 2263 postcode localities. Specifically, these postcodes are ranked in the top 5% of 621 NSW localities requiring rent assistance for people aged 18 and over (APO, 2015). Postcodes 2259 and 2257 are in the top 10% of most disadvantaged for this indicator (APO, 2015). Unskilled workers (postcodes 2262 and 2263), long term unemployment (postcode 2263), numeracy insufficiency (postcodes 2262 and 2257) and psychiatric admissions (postcode 2263) are also areas of concern, with 4 of the 10 postcodes ranking in the top 10% of most disadvantaged (APO, 2015). Overall, 6 out of the 10 Central Coast postcodes are ranked in the top 30% of most disadvantaged communities when compared to the 621 localities in NSW (APO, 2015).

3.5.2 Intra Regional Transport Network/ Linkages

Whilst the Central Coast is well connected via rail & major roads to Sydney and Newcastle, intra-regional transport is difficult, with only a north-south spine providing services. Traversing the region is not an easy prospect, certainly made more difficult due to the natural structure and waterways, which provide challenges. A lack of public transport option is cited as being partly attributable to youth unemployment due to difficulties in getting to/from potential work locations, even though employers in these regions cite skilled labour shortages as being a key issue. The issue affects large sections of the community and also impacts on potential tourism growth – particularly for those who may arrive via train from Sydney. This is a challenge that once addressed could have significant benefits to the community.

3.5.3 Service Infrastructure to Activate Zoned Employment and Business Lands

Currently in the Central Coast there is a significant amount of land zoned for employment, however, businesses cannot use it yet as it is not serviced. Council will need to carry out work on roads, water supply systems, sewers,

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fencing and landscaping before it will be serviced appropriately. The packages of land have also been identified as being too small for large scale industrial warehousing, which once serviced could bring large scale manufacturing and industrial businesses to the region. The urban spatial plan will seek to plan to enable larger land parcels and service lands.

3.5.4 Perception & Marketing (Internal & External)

There are some very positive aspects of the Central Coast economy that are currently underplayed. There is a general lack of awareness of the current strengths and potential future opportunities – particularly for business and industry, that are important selling points for the region, which, if matched with the opportunities offered by the region's lifestyle, begin to form some compelling arguments for inward investment and population (particular worker) attraction.

DRAFT SUBJECT TO COUNCIL ENDORSEMENT



4. INFLUENCING FACTORS

4.1 KEY GROWTH SECTORS TO 2040

Industries that are well-represented and are expected to have high growth are industries that benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience strong (above average) average annual employment growth in New South Wales. These sectors should be pursued for economic development activities, as they are likely to experience significant growth in coming years. The industries located in this section for Central Coast are:

- Health Care and Social Assistance (LQ = 1.4, Growth Expectation = 1.8%)
- Retail Trade (LQ = 1.3, Growth Expectation = 1.6%)
- Accommodation and Food Services (LQ = 1.3, Growth Expectation = 1.5%)
- Construction (LQ = 1.2, Growth Expectation = 1.4%)
- Rental, Hiring and Real Estate Services (LQ = 1.1, Growth Expectation = 1.5%)

As manufacturing has many 2-digit industries that can be vastly different, an analysis of these industries is undertaken. An assessment of location quotients at the 2-Digit ANZSIC level suggests Central Coast has labour specialisations in the manufacturing industries of:

- Wood product manufacturing (LQ = 3.0)
- Fabricated metal product manufacturing (LQ = 1.5)
- Non-metallic mineral product manufacturing (LQ = 1.4)
- Food product manufacturing (LQ = 1.3)
- Machinery and equipment manufacturing (LQ = 1.1)
- Furniture and other manufacturing (LQ = 1.1)

Industries which are under-represented are expected to have high growth are industries which don't benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience strong (above average) average annual employment growth in New South Wales between 2016 and 2026. These sectors should be investigated further, where appropriate, to determine their potential to be targeted for economic development activities as they are may perform well in the coming years if local supply chains and support are available. Industries located in this section for Central Coast are:

- Education and Training (LQ = 0.9, Growth Expectation = 1.6%)
- Administrative and Support Services (LQ = 1.0, Growth Expectation = 1.5%)
- Electricity, Gas, Water and Waste Services (LQ = 1.0, Growth Expectation = 1.4%)
- Public Administration and Safety (LQ = 0.8, Growth Expectation = 1.5%)
- Arts and Recreation Services (LQ = 0.9, Growth Expectation = 1.4%)
- Professional, Scientific and Technical Services (LQ = 0.6, Growth Expectation = 1.6%)
- Transport, Postal and Warehousing (LQ = 0.7, Growth Expectation = 1.4%)
- Financial and Insurance Services (LQ = 0.6, Growth Expectation = 1.5%)

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4.2 CHANGING DEMOGRAPHIC TRENDS

The average age in Central Coast in 2017 was 40.9 years, an increase from 2008 at 39.6 years. Central Coast's population is expected to grow and with it, the average age of residents, which is expected to grow to 42.3 years old by 2036. This is likely due to both the aging nature of the wider population as well as the number of youths leaving the region as a result of the lack of opportunities for youths in Central Coast. By creating opportunities to retain their youths, this will help to develop the Central Coast economy.

4.3 COMMUNITY FEEDBACK

A survey of Central Coast Council officers, as well as the Central Coast resident community, was facilitated through the development of the strategy. A detailed survey analysis report was provided to Council and following are the key takeaways.

Lifestyle and liveability of the area are considered key strengths and competitive advantages for the region amongst staff and well as the community. Following lifestyle, the natural environment and accessibility are considered key strengths for the region.

Amongst the staff and the community, lack of job opportunities and transport were identified as the key challenges for the region.

Amongst the residential community, business expansion and tourism are seen as key opportunities for the region. Meanwhile, the staff nominated the creation of 'city based' (Sydney CBD) jobs through the attraction of new business, or relocation or expansion of existing business as the main opportunity for the region – in this way, current commuting residents would also be given the opportunity to find employment close to home. Both of these aspects are invariably related to accelerated jobs opportunities and are linked to the key challenges identified.

The top three areas nominated by the staff for development and prosperity of the region are linked to infrastructure, jobs and sustainable development. Whilst infrastructure was also identified for ideal future vision by the community, residents specifically highlighted the airport/aviation as the best suited industry for future development and ideal vision of the future.

4.4 IDENTIFIED COMMUNITY DESIRES

The consultation identified the following core elements of the future Central Coast socio-demographic and economic structure to 2040. These are summarised below.

4.4.1 Lifestyle & Health

Creating a lifestyle location in Central Coast is essential for creating a place for all residents but also attracting people and investment to the region.

An attractive lifestyle for the older population (over 50s) is important for Central Coast, which will accompany and support the local health precincts development in Gosford.

Once an attractive lifestyle for residents has been developed, this can then be leveraged for activation of the visitor economy.

4.4.2 Protection of the Natural Environment

While the natural assets the Central Coast has to offer are to be leveraged to increase tourism and lifestyle for residents, it is necessary that where possible, protect the environment and make sure that these assets are sustainably managed and developed. Constraints mapping is required to identify those areas that must be protected and those areas where development is justified and should be supported.

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4.4.3 Leadership & Communication

There are multiple organisations in the Central Coast working to grow the economy and employment opportunities, however, many do not know what other departments are doing. Leadership and a central driver such as the coordinator general to have everyone working together is necessary for the region's economic development.

Collaboration between Council, Government Departments and business and industry is key in maintaining the current businesses in the region as well as drawing more businesses to the area.

Communicating to businesses outside of the Central Coast that it is open for business and that there are opportunities and support to locate in Central Coast.

4.4.4 Available Serviced Industrial Land to Support Business & Employment Growth

There is a large amount of zoned industrial and business land, however very little of it is serviced appropriately and therefore businesses that want to move to the region cannot find the appropriate land causing these businesses to relocate elsewhere.

4.4.5 Lifestyle & Recreation Precinct

The Central Coast region requires an entertainment precinct, to increase visitation and liveability of its residents and to act as a catalyst to attract private investment. The identified location from consultations is close to the Central Coast Stadium so that major events can continue in the precinct whilst also being close to the Gosford Foreshore. This will work in with the Gosford City Centre Revitalisation which include transforming the Leagues Club Field into a nature-inspired play space, as well as increasing development in the city centre.

An entertainment precinct will likely help to retain youths in the region, especially on weekends with many travelling to Sydney for nightlife. Development of an active night time economy (NTE) through activities such as place activation and establishment of convention and conferencing facilities are key strategic actions

This will also improve the liveability and lifestyle offering of the region, giving residents and people from outside of Central Coast a reason to come for a holiday. With more attractions and offerings identified as a key to increasing tourism and business investment

4.4.6 Local Transport and Access

Local transportation is a must have for the Central Coast, as improving connections to all areas will produce benefits to youth unemployment, tourism and liveability for residents.



5. VISION & TARGETS

5.1 ECONOMIC VISION

Our Bold 2040 Vision for a New Central Coast A choice destination, greater than Sydney, succeeding because of abundant opportunities and incredibly skilled people that thrive on a strong indigenous heritage, natural beauty and unique lifestyle.

5.2 KEY TARGETS

The characteristics of the future economy and how this differs from the current economy are summarised below.

Table 5.1. Key Central Coast Growth Targets to 2040

Description	Now	Goal	2040 Target	Gap
Population	342,047	Realise medium series population projections	429,684	87,637 people
Jobs	126,459	1.5 new jobs per new dwelling to 2040.	199,091	72,632 jobs
Employment Self Containment	71.7%	10% enhancement	78.9%	7.2 percentage points
Tourism visitors	4.7 million nights	50% increase in the Central Coasts share of the Greater Sydney Tourism market	14.8 million nights	9.9 million nights
GRP per capita	\$39,453	In line with the Greater Sydney GRP per capita	\$80,775	\$41,322
Gross Regional Product	\$13.5 billion	In line with the Greater Sydney GRP per capita	\$34.7 billion	\$21.2 billion
Household Income	\$1,594 per week	In line with Greater Sydney	\$2,118 per week	\$524

Note: 2040 measures are in 2018 dollar terms

The rationale and logic behind the above growth targets is summarised as follows:

- The population goal is aligned to meet the medium series population projection for the region.
- The jobs target is set to increase the level of local employment targeting the generation of 1.5 jobs per new dwelling developed, which is driven by, and associated with, the talented and educated workers attracted to the region by its lifestyle and job opportunity.
- The additional local jobs will enhance employment self-containment, with a goal of a 10% increase in self-containment by 2040.
- The new jobs will be higher value and paying positions, therefore lifting the GRP per capita, with a goal to be in line with that of Greater Sydney.



6. STRATEGIC THEMES & PRIORITY ACTION

The following strategic themes were identified through background analysis and consultation with key stakeholders in Central Coast.

Each presents a goal, a rationale and headline objectives and tasks to deliver the strategic initiative. A detailed implementation plan has been developed for each and is contained as a separate working document, as it will be updated, refreshed and refocussed regularly. Opportunities for funding to support the implementation of the strategic focus areas action plans are identified at the end of the section.

6.1 ECONOMIC COORDINATION

Goal: Effective planning and governance are cornerstones of successful economic development strategies. We are committed to developing best-practice, agile frameworks to lead and coordinate economic development for the Central Coast. We will provide one single and consolidated message to all key stakeholders regarding the vision, key infrastructure and funding requirements/ priorities for the region and in doing so, deliver economic growth and regional confidence through clear regional leadership and a concerted and collaborative push for identified regional priorities that will deliver growth for the region.

Rationale:

The Central Coast Council must provide one single and consolidated message to all key stakeholders regarding the vision, key infrastructure and funding requirements for the region. This will be developed and supported in conjunction with key industry stakeholders such as RDACC, HCCDC, CCIC, NSW Business Chamber, Local Aboriginal Land Council Darkinjung and key government departments. Council has a clear role as a leader and advocate for the regional community and business to support major infrastructure projects, overcome restrictive policy and legislation and/or work with business and industry proactively to form partnerships that will assist in achieving positive investment outcomes for the council area.

A united and coordinated approach from Council will assist in working toward economic development outcomes. Consultation identified that there was a strong need for a more coordinated and cohesive approach to achieving economic development outcomes and Council has the opportunity to take a lead in this role.

Priority Actions:

- Update Council's governance and resourcing of its economic development functions
- Identify suitably qualified experts and leaders with a range of skills to work with and advise Council's leadership with expert advice and co-ordinating capacity for ongoing Economic Development best practice.
- Develop a Central Coast Advocacy framework for Council to plan and deliver advocacy to implement identified priorities and drive change in the political landscape to influence public investment, build key relationships and influence policy
- Develop a Central Coast Economic Development Marketing and Communication Plan
- Explore new options to 'democratise' economic planning and prioritisation by enabling broader community and business engagement

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



6.2 ECONOMIC PARTNERSHIPS

Goal: Collaboration with partners is an economic development catalyst, generating better policies, expanded trade and commerce, new investment, and knowledge exchange. We are committed to nurturing partnerships that deliver economic strength, resilience, and opportunity to the Central Coast.

Rationale:

The Central Coast covers a large area with a diversity of townships, community groups, government and Councils. In order for the Central Coast to realise its potential as a region with a City that has a growing diverse economy which retains its youth and raises all levels of benchmarking data to level with greater Sydney strong leadership and collaboration with key industry stakeholders such as RDACC, HCCDC, CCIC, NSW Business Chamber, Local Aboriginal Land Council Darkinjung and key government departments will form the cornerstone of achieving our vision.

Priority Actions:

- Collaborate with all levels of government and the community to secure a City Deal for the Central Coast to support productive and liveable cities that encourage innovation, support growth and create jobs
- Develop a regional economic action plan with surrounding councils to leverage economic agglomeration
- Collaborate with local industry and community to prepare a Visitor Economy Growth Action Plan
- Prepare a roadmap to enhance international economic engagement and trade, working with Austrade and NSW Government
- Collaborate with all levels of government to deliver essential services and infrastructure to our growing communities across the Central Coast

6.3 ECONOMIC INFRASTRUCTURE

Goal: Physical and digital infrastructure are foundations of economic development, providing vital networks to support investment, trade, innovation and wellbeing. We are committed to building high-value local infrastructure, working with other governments and the private sector to expand the Central Coast's economic capacity. Key targets being, public transport network to allow the local population to access job opportunities as well as the available serviced employment lands to attract new employers to the region.

Rationale:

The Central Coast has significant tracts of zoned industrial land, however, much of it is in part or wholly constrained by environmental constraints, and/ or a lack of infrastructure. This means the effective available employment lands accessible by new businesses wanting to invest in and locate to the Central Coast are very limited. Identified employment land and activation precincts such as the Southern and Northern growth corridors. The Southern Growth Corridor links the Somersby Business Park and to Erina, providing services to the communities in the southern half of the region. The Northern Growth Corridor links Tuggerah to Warnervale to become a priority location for service and business growth.

Whilst the Central Coast is well connected via rail and major roads to Sydney and Newcastle, intra-regional transport is difficult, with only a north-south spine providing services. Transport from residential areas to employment areas without a car is difficult. This is made more complex by the natural structure and waterways. A lack of public transport options presenting difficulties in getting to/from potential work locations is cited as being largely attributable to the high local youth unemployment, even though employers in these regions cite skilled labour shortages as being a critical issue/ constraint.

The region needs a proactive and investment ready (supportive) planning framework and team that reflects the economic strengths and growth areas of the economy. Industries such as food product and housing component manufacturing, education and training, transport and logistics, health and medical precincts and industrial and commercial space in general need to be catered for and areas found for their expansion.

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY

**Priority Actions:**

- Progress growth corridor development strategies
- Progress development strategies for Urban Release Areas
- Enhance local infrastructure with 'smart technology' to increase efficiency, connectivity and capacity
- Prepare a Central Coast Transport Strategy, highlighting priority transport infrastructure projects, over the short and longer term to achieve the 30-minute city
- Explore options to bring super-fast digital connectivity to the Central Coast (including optic fibre, mobile, and wireless networks).
- Work with local developers to modernise planning processes and requirements to future-proof our new developments
- Develop a dedicated, long-term Central Coast Infrastructure implementation plan to guide local planning and engagement with the State and Federal governments to clearly articulate the need and benefit

6.4 ECONOMIC INNOVATION & ENTERPRISE

Goal: Local business and enterprise are the drivers of economic development, powering employment, innovation, and investment. We are committed to supporting a thriving business and innovation eco-system, creating new jobs, commercial profit and community value for the Central Coast.

Rationale:

The Central Coast has strong representation in advanced manufacturing, health care and social assistance, retail trade, accommodation and food services, construction but is also poised to benefit from the emerging sectors in education and training, professional scientific and technical services, logistics and transport, financial and insurance services and the visitor economy. We can begin to build the future of tomorrow by mobilising the students of today to be ready for tomorrow through working with established industries and capitalising on the emerging high growth industries.

Priority Actions:

- Work with the local innovation eco-system to establish a Central Coast Innovation Network
- Start a digital education and accelerator program for all primary and secondary public schools on the Central Coast
- Establish and partner with Universities to foster collaboration and attraction of new high value industry and to enhance existing established industry
- Identifying precincts and sectors with high growth prospects, and preparing roadmaps to drive this economic development
- Develop an internal Innovation Policy Framework for Council
- Transform Council's innovation and business development programs to enhance local impacts and outcomes
- Prepare a roadmap to drive economic vibrancy and diversity, exploring options such as events, city activations, better design, place-making, and promotion and utilisation of natural areas
- Build on existing advanced manufacturing and food innovation to enhance and promote business excellence
- Prepare a health innovation business case to compliment the growing health economy

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY



6.5 ECONOMIC FUTURES

Goal: The digital revolution is driving incredible changes to economies and communities the world over, presenting a host of new opportunities and challenges. We are committed to future economy leadership, leveraging digital technology and new economic opportunities for a stronger Central Coast.

Rational:

For the Central Coast to achieve the 30-minute city, digital infrastructure is the foundation of a smart city which draws its people into the CBDs for high value work and retains existing industry and attracts new innovative industry. With 65% of children now entering school projected to hold jobs that currently don't exist the promotion and facilitation of digital literacy coupled with smart infrastructure will enable the Central Coast workforce to pivot positively towards the emerging economy of the future.

The children and youth of today play a key role in mobilising towards the emerging future economy. It is imperative that we engage, collaborate and assimilate what the future generation desire. It is essential that we provide exciting opportunities and activities locally that attract and retain the younger generation after leaving school.

Priority actions:

- Prepare a Night-Time Economy discussion paper, exploring options for enhancing the diversity and size of our night-time economy
- Develop and implementing a Central Coast Future City (Smart Technology) road map
- Work with industry and community to promote 'smart working' (e.g. remote/flexible/co-working) opportunities for the Central Coast
- Promote programs to improve digital literacy and skills for all primary and secondary public schools and for businesses and the broader community
- Establish a framework to optimise the economic value of 'big data' for the Central Coast
- Prepare a youth engagement action plan for enrolment and education to enhance human capital, capacity building, employment opportunities and participation

6.6 ECONOMIC TRANSFORMATION

Goal: In a fast-paced global economy, retaining competitiveness and meeting changing community expectations depends on continuing economic transformation. We are committed to progressing such reform – of economic systems, regulations, and frameworks – to ensure the ongoing strength and sustainability of the Central Coast's economy.

Rationale:

Encouraging established businesses to invest further and attracting new investments to the region enables governments to stimulate employment and develop the economy and in doing so, drive accelerated job growth and prosperity. Governments support investment (existing business expansion and new investment) primarily by developing a business environment that is attractive and by promoting the attributes of their region as an investment location. Council may, in some instances, provide incentives (financial and non-financial) and other services to support and encourage investment. There are a range of investment attraction incentives local government can pursue to attract, support and encourage investment

A local government that is supportive of business investment and is proactive in its planning policy and development approvals will be seen as a cooperative, supportive and attractive investment ally. Disinterest, confused processes and changeable rules all present strong signals to investors that it will be better to invest elsewhere.

For a local government to fully embrace business and industry support and investment attraction it must be appropriately resourced.

Priority Actions:



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY

- Identify high value regulatory reform and 'red tape' reduction initiatives to unlock economic growth
- Develop a 'Circular Economy' framework to build our sharing economy
- Explore options to accelerate the production and consumption of renewable energy to power the Central Coast economy
- Prepare an economic roadmap for the Central Coast to progress the UN's Sustainable Development Goals (SDGs)
- Prepare a framework to incentivise to attract new high value corporate commercial business and partner with Government, to attract Government institutions to relocate to the region in order to lead the revitalisation of the CBDs and enhance the employment diversity of the region

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Investment Attraction Incentives

Non-Financial Investment Attraction Incentives

When considering the term 'incentives', this is not solely – and often, in the case of local government – rarely related directly in financial terms. Typically, assistance is offered and provided in the form of utilisation of existing services to provide benefit. This type of assistance is not to be underestimated or undervalued. Smooth and swift development assessment processes and the intentions of a progressive and engaged local government can contribute significantly to the development process and in turn have a substantial impact upon development costs.

Common amongst the types of 'soft' services offered by local government that are exempt of financial offerings, but equally provide benefit to proponents may take the form of:

- Site selection services
- Site infrastructure advice
- Assistance with planning processes to facilitate development approvals
- Links to government, business and employment support programs
- Access to statistical and general information and other reports that may assist business
- Access to business and community network contacts such as Chambers of Commerce
- Market information
- Supply Chain and workforce development.

Financial Investment Attraction Incentives

Local governments may also offer financial investment incentives to businesses wishing to locate, expand and retain their operations within the region. It is important to note that not all investment attraction activities are externally directed and that a portion of investment will logically come from within the area. Retention of local business that are seeking to expand is just as important as the attraction of new opportunities.

Discretionary support may be provided to approved businesses and projects where the nature and scale of investment displays the propensity to stimulate significant (sometimes quantified) economic and community benefits, diversity and value-add to the wider regional economy beyond the growth of the business itself. Typically, if offered, local government investment incentives seek to support projects that:

- Inject direct capital investment
- Create new jobs
- Create direct value-add through construction and operations
- Catalyse additional investment
- Generate growth in a key strategic area
- Support the growth of other businesses.

Direct financial incentives typically would take the form of offsets or deferrals for infrastructure costs, rate rebates or other discounts on related development assessment fees or financial grants for establishment costs.



7. IMPLEMENTATION

A detailed implementation plan outlining the targeted measures, responsibilities and timings for each action are outlined in a separate implementation plan. This plan is intended to be a working document with implementation progress monitored on a quarterly basis and an annual review refocussing key areas of investment and activity as required. The following sections outline the Central Coast Council and its Executive Leadership Teams role in economic development and the delivery of this strategy.

7.1 IMPLEMENTATION PLANNING

A detailed implementation plan is provided under a separate cover as it forms a working document that will be updated on a regular basis (at least every 2-3 years) and refocussed to ensure it is working with and being responsive to the ever changing surrounding environment.

The implementation plan provides an overview of the core focus and direction to realise the opportunities and catalytic enablers for the Central Coast outlined in the preceding Economic Development Strategy.

7.2 COUNCILS ROLE IN ECONOMIC DEVELOPMENT

The role of Local Government in economic development is sometimes difficult to define, often subject to the unique priorities and regional constraints influencing the achievement of outcomes. In any case, the role of Council will typically fall into one of the following categories.

- **Advocacy:** The Council engages the business community and other levels of government to develop commitment, energy and attitude towards identified priorities. For the EDS, Council has a role to play in advocating for business needs, maintaining a future-focused agenda, and supporting the delivery of critical infrastructure to support economic development priorities.
- **Facilitation:** The Council acts in the EDP as a facilitator of opportunities. This involves connecting the various stakeholders to achieve desired outcomes. The Council can act as the information link between government, business and consumers, as relevant information is vital in generating local awareness and demand for identified priorities. The Council can also promote events and activities that support business capacity building and other economic development related initiatives, such as workshops to build the knowledge of businesses around skill development.
- **Planning & Regulation:** The Council's planning framework provides a mechanism to regulate and/ or encourage certain activities and developments that influence economic activity. Specific opportunities that relate to the EDP is the role the Council plays in making sure a positive, proactive and solution focused approach is applied.
- **Service Provider:** Service provision is one of the major functions of Local Government. A reliable supply of services and information can support economic development related opportunities.

7.3 GOVERNANCE

To be effective the EDS needs to have actionable targets tied back to the objectives of each strategic direction. It is critical these are resourced and funded as part of Council's annual Operational Plan. There are a range of funding sources available for the execution of the EDS, and Council needs to ensure there are clear and consistent guidelines regarding how funding is secured and allocated.

Beyond this Council needs a clear path and mechanism through which it communicates with and engages with the local business community and potential investors.

With the criticality of the earnest change required for the Central Coast to take advantage of current development interest, reinvigoration of the Gosford CBD and improved accessibility brought about by the NorthConnex infrastructure project, there may be a case for exploring differing models of governance to assist in driving the economic agenda.



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Such varying models exist in many other local government areas across Australia and the suitability of each has its pros and cons, which are outlined in the table below.

Table 7.1. Overview of Observed Pros and Cons of Governance Options

Structure	Typically Observed Pros	Typically Observed Cons
Advisory Board/ Committee	<ul style="list-style-type: none"> • Accesses private sector leadership and knowledge • Easier accounting and financial reporting • Greater alignment with Council goals • Creates forum for public-private discussions 	<ul style="list-style-type: none"> • Must operate under Council bureaucracy • Less flexible than independent models • Depending on governance, can have limited scope and influence
Strategic Alliance	<ul style="list-style-type: none"> • Simple structure usually agreeable to all members • Creates forum for regional cooperation and discussion • Can have effective lobbying voice to State and Federal Government • Informal structure can allow flexibility and efficient response to issues 	<ul style="list-style-type: none"> • Limited commitment from members • Limited buy-in from members • Difficult to tackle big issues • Difficult to affect change and demonstrate results • Places undue stress on existing commitments • Limited funding
Government Agency	<ul style="list-style-type: none"> • Independent government agencies that operate under a CEO/Board structure • More efficient and able to react to issues • Strong ties to Government for policy and funding • Strong structure and foundation 	<ul style="list-style-type: none"> • Still a part of government bureaucracy • Limited by Act and formal structure • Funding options are limited
Independent Association/ Organisation (Third Party)	<ul style="list-style-type: none"> • Leverages private sector experience • Delivery/outcome focused • Independent • Highly efficient and flexible • Leverages a broader set of skills • Can react quickly to market/issues • Combines public and private sector funding and input • Has significant input from private sector 	<ul style="list-style-type: none"> • Funding can dictate action • Personalities/staff critical to success • Highly visible • Financial reporting required • Governance must be correct to ensure strategic direction

Key considerations in the operation of a governance model is to ensure there are sufficient and appropriate review periods and sunset clauses as required to ensure the entity remains focussed, efficient, effective and avoids becoming a bureaucracy in and of itself.

7.4 FUNDING SOURCES

There are numerous opportunities for public investment available to the Central Coast Council to support the delivery of the Economic Development Implementation Plan. The core options, likely suitable to support the identified Central Coast options are outlined below:

Figure 7.1. Project Funding

Fund	Focus
Federal Government	
Climate Solutions Fund – Emissions Reduction Fund	On 25 February 2019 the Australian Government announced the Climate Solutions Fund, providing an additional \$2 billion to continue the momentum towards reaching Australia's 2030 emissions reduction target. The Emissions Reduction Fund supports Australian businesses, farmers and land managers to take practical actions to reduce emissions and improve the environment.



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Fund	Focus
Clean Energy Finance Corp	The Clean Energy Innovation Fund is the largest dedicated Australian investor of its kind. It was created as a specialist financier to invest \$200 million in early-stage clean energy companies. The Fund targets technologies and businesses that have passed beyond the research and development stage and which can benefit from early stage seed or growth capital to help them progress to the next stage of their development.
Cooperative Research Centre (CRC) Grants - Round 21	The Cooperative Research Centres (CRC) Program supports industry-led collaborations between industry, researchers and the community. It's a proven model for linking researchers with industry to focus on research and development towards use and commercialisation.
Austrade: Export Market Development Grants (EMDG)	Provides exporters who are aiming to increase their international sales with reimbursements of up to 50% of promotional expenses. Promotional expenses must be over \$15,000 to a maximum of \$150,000.
NSW Government	
Tourism Infrastructure Development Fund	The NSW Government has \$100 million available for new tourism projects across regional NSW with round two of the \$300 million Regional Growth—Environment and Tourism Fund now open.
Boosting Business Innovation Program	The New South Wales Government has invested \$18 million in the Boosting Business Innovation Program, giving small businesses access to research organisations to build strong local business communities and stimulate economic growth in metropolitan and regional NSW.
TechVouchers	The TechVouchers fund encourages research collaboration between NSW small-to-medium enterprises (SMEs) and Boosting Business Innovation Program (BBIP) delivery partners. Through TechVouchers, SMEs can be connected with an expert in a relevant field of research and embark on an innovative joint research project. The program also enables access to high tech instruments and facilities that would otherwise be difficult to access.
Growing Local Economies Fund	Is used to invest in crucial projects needed to support job creation and economic growth in regional NSW. This could be used to invest in the necessary infrastructure to service employment lands. The GLE program has been paused as of 14th July 2019 but will reopen following a review.
Small Business Grant	The Small Business Grant is designed to encourage small businesses, not liable for payroll tax, to employ new full-time, part-time and casual workers.
Infrastructure grants	The NSW Government offers grants to communities across NSW to support the building, renovation and fit-out of infrastructure. Funding is available for arts and cultural infrastructure, sport and recreation infrastructure and projects that enhance facilities used to shelter communities and provide emergency services.
Snowy Hydro Legacy Fund	The fund will help to deliver critical infrastructure and priority initiatives identified in the 20-Year Economic Vision for Regional NSW, NSW State Infrastructure Strategy 2018–2038 and other long-term government plans. The five areas of immediate focus will be improved water security, rail and road transport connections, freight linkages, digital connectivity and Special Activation Precincts to attract more industry investment in the regions.
Central Coast Council	
Fund the program from general revenue	Using general Council revenue to fund economic development programs.
Borrow for infrastructure development	Take out loans for investment in infrastructure development.

Source, Australian Government (2019), Austrade (2019), CEFC (2019), NSW Government (2019b).

7.5 MONITORING & EVALUATION

The Economic Development Strategy requires a mechanism to measure its performance. The ultimate goal of the Strategy is to create more jobs, create a quality lifestyle and ensure thriving, adaptable and responsive local businesses and industries. It is expected there will be two areas of measurement:

- Measuring the useful implementation of the strategy: focussing on the key performance indicators outlined in the implementation plan. Essentially ensuring the plan is being executed as intended



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- Measuring the economic outcomes delivered for the regional economy. This is very challenging to do on a causal basis; however, typically overall economic performance is monitored by tracking a range of broader economic development indicators. An example range of which is included in the table below.

Table 7.2. Key Indicators to Monitor

Indicator	Description
Growth	
GRP Growth	A key indicator to measure the degree to which the economy is prospering is GRP Growth as this will determine the level of economic activity in Central Coast.
Employment Growth	Sustainable employment growth is an indicator of which to measure success of the economy by increasing jobs within the region.
Population Growth	Strong population growth will mean that Central Coast is becoming more liveable and appealing.
Prosperity	
GRP per Capita	GRP per capita measures a regions prosperity as well as the standard of living of those living there.
Unemployment Rate	A decrease in the unemployment rate will mean more people looking for work have been employed.
Incomes (Household and Personal)	A higher average income for both households and individual persons means that businesses are prospering and can afford to pay higher wages.
Productivity	
GRP per FTE	To measure increasing in prosperity GRP per FTE will determine if more is being produced efficiently.
Business Support and Investment Attraction	
Business Counts (Total and Key Industries)	More businesses in key industries can be measured through the annual business counts of Central Coast.
Innovation	
IP Registrations	IP represents creations of the mind or intellect that can be legally owned. IP laws allow for protection of ideas and unique creations that exist in every business and if more registrations are occurring in Central Coast this will mean that there has been an increase in innovation.
Education	
School Containment Rate	This will mean that there is a higher level of students studying at school after they can leave giving them a greater education.
Post-School Qualifications	Post-school qualifications will take a longer period of time to see change but is a measure of educational attainment.
Proportion of Residents Attending Educational Institution	An increase in the proportion of residents that are studying will give a measure of more people searching for higher levels of education.
Infrastructure Delivery	
Non-Residential Building Approvals (by type)	More non-residential building approvals will mean an increase in industrial buildings and workspaces.
Major Projects Planned	The number of planned major projects will mean that more infrastructure is being delivered and is a key measure of infrastructure delivery.
Health	
Obesity Rates	Obesity rates declining is a key measure of health in Central Coast with less obese people causing an uplift in the health of residents.
Core Activity Need for Assistance	If there are more people in need of assistance this is likely a result of an increase in disabilities in the region.
Suicides	The rate of suicides is a key measure of mental health in Central Coast, and declining levels will mean that mental health is improving.

Source: AEC.



8. CATALYTIC PROJECTS

There were a number of catalytic projects identified as having the greatest potential to most expediently activate economic growth in the central coast region. These catalytic initiatives (outlined below) should be prioritised throughout the implementation and delivery of the Strategic Focus Area actions outlined in Section 6.

8.1 DEVELOPMENT & LOBBYING FOR A CITY DEAL

City Deals bring together the three levels of government (Australian, New South Wales and Central Coast Council), the community and the private sector. The City Deal partnership focuses on aligning planning, investment and governance to accelerate growth and job creation, stimulate urban renewal and drive economic reforms to secure the future prosperity and liveability of cities.

Potential projects developed to form part of a City Deal may include:

- Further redevelopment and revitalisation of Gosford into a City with High rise commercial space that increases employment retention and revitalises the waterfront into a world class entertainment, leisure, lifestyle and commercial precinct.
- Further redevelopment and revitalisation of Tuggerah to Wyong and the Wyong town centre.
- Development of Wyong Employment Zone including the Warnervale airport and surrounding employment lands into a General Aviation and Advanced Manufacturing Precinct
- Implementation of a Smart City Strategy to deliver business outcomes through digital connectivity.
- Development of innovation and enterprise hubs to foster entrepreneurship and new business start-ups
- Development of a dynamic, integrated regional transport system to achieve 30 minute city objectives.

8.2 AVAILABILITY OF SERVICED EMPLOYMENT LANDS

Council must be proactive in ensuring that there is sufficiently available and appropriately zoned and serviced employment land to satisfy the growth needs of business and industry. The availability of appropriately zoned and serviced employment lands will facilitate the retention and expansion of existing business. It will also accommodate the anticipated new investment as industry takes advantage of the opening up of the northern corridor.

A critical factor in generating local demand for both the current and future Central Coast, is the facilitation and planning for the short term and ongoing release of serviced lots ahead of market demand.

8.3 LOCAL TRANSPORT NETWORK SERVICES

Whilst the Central Coast's external connectivity via the M1 and rail linkages is good, the internal servicing outside of direct north-south routes makes traversing the region via the public transport network difficult. This lack of transport is cited as a key inhibitor for accessibility that increases employment options. This is particularly relevant to youth unemployment when addressing their ability to access education, training and employment services.

It is critical that the Central Coast community is sufficiently connected by its internal public transport network so they may wake each day with easy, cost effective and time efficient means of travelling to school to work, to the doctor, to see their family or access services. Higher levels of accessibility will benefit youth unemployment, the aged, tourism and liveability levels for residents.

8.4 DEVELOPMENT OF THE NIGHT TIME ECONOMY (NTE)

The Night Time Economy (NTE) can be defined as social or business activities that take place between 6pm and 6am. This includes a myriad of business activities, events and services. Overall, it is generally accepted that the NTE is driven by three core areas, with example activities described below, however, it is a diverse sector and may include varied activities and incorporate ancillary services such as transport and retail. It includes:



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- Entertainment: Performing arts, music and culture, sports, amusement parks and centres, casinos and gambling
- Food: Cafes and restaurants, as well as takeaway food services
- Drink: Liquor retailing, pubs, taverns, clubs, bars and hotels

Local government plays a key role in helping to shape vibrant, safe and sustainable Night Time Economies (NTEs), from planning and regulation, to creating spaces through placemaking and urban design to ensuring that a safe, protective environment is conducive to the encouragement of activities that help build and grow active centres.

The Redevelopment of areas within the Gosford CBD, along with place activation initiatives support and encourage the establishment of night time activities. Key developments that support the development of the night time economy include:

- Gosford Waterfront Re-Development: delivering cultural, recreational and leisure space
- Relocation of the University of Newcastle campus to the CBD will drive transformational change to the CBD population and act as a catalyst for new shops, bars, cafes and restaurants to service the student population, 300 of which will also be accommodated within the CBD area.
- Conference and convention facilities¹ at the waterfront precinct, which in turn support demand for additional short term accommodation.

8.5 AVIATION & ADVANCED MANUFACTURING PRECINCT

Feedback from the Community Survey regarding perceptions of the top three future industries for the Central Coast highlighted the aviation (and related) sector as a key and well supported development opportunity. Whilst there has been considerable debate regarding the development of the Warnervale airport, there are clearly opportunities to be explored for some expansion and development that could act as a catalyst for the attraction of high value aviation and aerospace related industries, including:

- Aircraft charter
- Manufacturing and maintenance
- Emergency services operations
- Airborne survey, surveillance and geo-sensing
- Helicopter operations
- Flight training.

The planned future expansion of Newcastle airport located less than one hours drive away, equally offers support and ancillary service opportunities for Central Coast based businesses.

8.6 DEVELOPMENT & IMPLEMENTATION OF A SMART CITIES PLAN

With the level of infrastructure and new development works to be carried out throughout the region, there is a significant opportunity to integrate elements of Smart Cities frameworks and functions into and throughout the fabric of the Central Coast. A Smart Cities Plan can contribute to the following outcomes:

- A strong and connected community that uses emerging technologies and helps to increase community and business participation levels and connectivity
- Create a more liveable region that utilises, smart technologies in its public places and embeds these technologies within its infrastructure

¹ The Meetings, Incentives, Conferences and Events (MICE) sector makes a significant contribution to the Australian economy. In 2018-19, revenue is projected at \$12.5 billion for the exhibition and conference centre industry, with New South Wales capturing 28% of total revenue.

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- Create a thriving region that is digitally enabled, and the infrastructure contributes to economic transformation in its support of business growth, investment and sustainability within priority sectors.

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9.1 Endorsed Central Coast Council Strategies / Plans

Year	Description
2018	Asset Management Strategy
2014	Carbon Tax Repeal Strategy
2019	Climate Change Policy
2019	Community Participation Plan
2018	Community Strategic Plan
2019	Corporate Strategic Plan
2020	Cultural Plan
2017	Destination Management Plan
2017	Disability Inclusion Action Plan
2019	Energy Procurement Strategy
2017	Engagement Framework
2019	Gosford Central Business District Heritage Interpretation Strategy
2013	Settlement Strategy (Wyong)
2019	Somersby to Erina Corridor Strategy
2009	The Entrance Peninsula Planning Strategy
2019	Tourism Opportunity Plan
2007	Water Plan 2050
2013	Wyong Retail Centres Strategy
2019	Youth Strategy
2019	Customer Experience Strategy
2018	Long Term Financial Plan
2018	Resourcing Strategy



ECONOMIC
DEVELOPMENT
STRATEGY

IMPLEMENTATION PLAN
2020-2040





CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

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CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

1. 5 YEAR IMPLEMENTATION PLAN

1.1 VISION

Our Bold 2040 Vision for a New Central Coast.

A choice destination, greater than Sydney, succeeding because of abundant opportunities and incredibly skilled people that thrive on a strong indigenous heritage, natural beauty and unique lifestyle.

1.2 TIMEFRAMES

To achieve the long-term objectives of the Central Coast Economic Development Strategy the 37 priority actions have been planned out over a 5 year implementation road map. The implementation plan will be reviewed annually to review progress and assess each of the actions are still in line with the overall objectives.

Year 1 commences 1 January 2020 and concludes June 30 2021

Years 2 to 5 are based on financial years and conclude on 30 June 2025

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CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 1.1. Implementation Plan: Short, Medium and Long term targets

Description	Now	Goal by 2040	2025 Target	2030 Target	2035 Target	2040 Target	Gap
Population	342,047	Realise medium series population projections	361,965	369,932	389,849	429,684	87,637 people
Jobs	126,459	1.5 new jobs per new dwelling to 2040	142,966	149,569	166,077	199,091	72,632 jobs
Employment Self Containment	71.7%	10% enhancement	73.5%	73.5%	77.4%	78.9%	7.2 percentage points
Tourism visitors	4.7 million nights	50% increase in the Central Coasts share of the Greater Sydney Tourism market	7.9 million nights	10.8 million nights	12.4 million nights	14.8 million nights	9.9 million nights
GRP per capita	\$39,453	In line with the Greater Sydney GRP per capita	\$52,595	\$61,981	\$71,368	\$80,755	\$41,322
Gross Regional Product	\$13.5 billion	In line with the Greater Sydney GRP per capita	\$17.7 billion	\$20.5 billion	\$25.4 billion	\$34.7 billion	\$21.2 billion
Household Income	\$1,594 per week	In line with Greater Sydney	\$1,761 Per week	\$1,880 Per week	\$1,999 Per week	\$2,118 per week	\$524



2. IMPLEMENTATION PLAN

The following strategic themes were identified through background analysis and consultation with key stakeholders in Central Coast.

Each presents a goal, a rationale and headline objectives and tasks to deliver the strategic initiative. A detailed implementation plan has been developed for each and is outlined below, as it will be updated, refreshed and refocussed regularly and as such, the implementation plan outlines the key initiatives for the first 5 years of the Central Coast Economic Development Strategy.

2.1 ECONOMIC COORDINATION

Goal: Effective planning and governance are cornerstones of successful economic development strategies. We are committed to developing best-practice, agile frameworks to lead and coordinate economic development for the Central Coast. We will provide one single and consolidated message to all key stakeholders regarding the vision, key infrastructure and funding requirements/ priorities for the region and in doing so, deliver economic growth and regional confidence through clear regional leadership and a concerted and collaborative push for identified regional priorities that will deliver growth for the region.

Rationale:

The Central Coast Council must provide one single and consolidated message to all key stakeholders regarding the vision, key infrastructure and funding requirements for the region. This will be developed and supported in conjunction with key industry stakeholders such as RDACC, HCCDC, CCIC, NSW Business Chamber, Local Aboriginal Land Council and key government departments. Council has a clear role as a leader and advocate for the regional community and business to support major infrastructure projects, overcome restrictive policy and legislation and/or work with business and industry proactively to form partnerships that will assist in achieving positive investment outcomes for the council area.

A united and coordinated approach from Council will assist in working toward economic development outcomes. Consultation identified that there was a strong need for a more coordinated and cohesive approach to achieving economic development outcomes and Council has the opportunity to take a lead in this role.

Priority Actions:

- Update Council's governance and resourcing of its economic development functions
- Identify suitably qualified experts and leaders with a range of skills to work with and advise Council's leadership with expert advice and co-ordinating capacity for ongoing Economic Development best practice.
- Develop a Central Coast Advocacy framework for Council to plan and deliver advocacy to implement identified priorities and drive change in the political landscape to influence public investment, build key relationships and influence policy
- Develop a Central Coast Economic Development Marketing and Communication Plan
- Explore new options to 'democratise' economic planning and prioritisation by enabling broader community and business engagement



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.1. Implementation Plan: Economic Coordination

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Update Council's governance and resourcing of its economic development functions	<ul style="list-style-type: none"> Provision of appropriate funding & resourcing of personnel and programs to enable effective delivery 	<ul style="list-style-type: none"> Economic Development driven activities are appropriately funded & resourced Efficiency of economic decision making 						
Identify suitably qualified experts and leaders with a range of skills to work with and advise Council's leadership with expert advice and co-ordinating capacity for ongoing Economic Development best practice.	<ul style="list-style-type: none"> Examine examples of other LGA models for economic development and investment attraction agencies Determine most appropriate potential model for Central Coast and table for discussion and progression 	<ul style="list-style-type: none"> External models are reviewed Report & recommendation made & considered Community Support for local economic policies 						
Develop a Central Coast Advocacy framework for Council to plan and deliver advocacy to implement identified priorities and drive change in the political landscape to influence public investment, build key relationships and influence policy	<ul style="list-style-type: none"> Identify and prioritise priority service, infrastructure & program needs for the broader region Develop an evidence base (business case) to advocate for public investment in identified projects 	<ul style="list-style-type: none"> Projects prioritised and are made 'shovel ready' through business case development Advocacy Plan developed Efficiency of economic decision making 	<ul style="list-style-type: none"> Department of Planning and Environment Regional Development Australia Central Coast Hunter and Central Coast Development Corporation Local Aboriginal Council 					
Develop a Central Coast Economic Development Marketing and Communication Plan	<ul style="list-style-type: none"> Develop a new regional brand that embodies the vision for the new economy Adopt a targeted program and approach to promoting the regions new identity and competitive advantages to potential investors and priority markets Establish a Central Coast ambassador program – utilising local identities and community and business leaders to promote the region Development of a quarterly Economic Development Activity 	<ul style="list-style-type: none"> Competitive regional branding and positioning statements developed for target markets and sectors Targeted marketing and promotional activities that reinforce the new identity and showcase the region are developed, focus tested and implemented Ambassador program developed in key focus areas with necessary tools and information 	<ul style="list-style-type: none"> Industry University of Newcastle Property Council of Australia Local Aboriginal Council Regional Development Australia Central Coast New South Wales Chamber of Commerce, Business NSW 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
	<ul style="list-style-type: none"> Newsletter that provides updated headline economic data, brief overview of major projects & celebrates local business community successes 	<ul style="list-style-type: none"> Quarterly updates provided to Council, Stakeholders & Community 						
<p>Explore new options to 'democratise' economic planning and prioritisation by enabling broader community and business engagement</p>	<ul style="list-style-type: none"> Seek interest from neighbouring LGAs to collaborate on potential projects that are of a scale and importance to meet City Deal requirements Form an agenda and charter to collaborate on joint beneficial projects 	<ul style="list-style-type: none"> Activated discussions with regional partners to agree on beneficial projects Community support for economic policies 	<ul style="list-style-type: none"> Regional Development Australia Central Coast, Hunter and Central Coast Development Corporation, Central Coast Industry Connect Surrounding Councils Local Aboriginal Council 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

2.2 ECONOMIC PARTNERSHIPS

Goal: Collaboration with partners is an economic development catalyst, generating better policies, expanded trade and commerce, new investment, and knowledge exchange. We are committed to nurturing partnerships that deliver economic strength, resilience, and opportunity to the Central Coast.

Rationale:

The Central Coast covers a large area with a diversity of townships, community groups, government and Councils. In order for the Central Coast to realise its potential as a region with a City that has a growing diverse economy which retains its youth and raises all levels of benchmarking data to level with greater Sydney strong leadership and collaboration with key industry stakeholders such as RDACC, HCCDC, CCIC, NSW Business Chamber, Local Aboriginal Land Council Darkinjung and key government departments will form the cornerstone of achieving our vision.

Priority Actions:

- Collaborate with all levels of government and the community to secure a City Deal for the Central Coast to support productive and liveable cities that encourage innovation, support growth and create jobs
- Develop a regional economic action plan with surrounding councils to leverage economic agglomeration
- Collaborate with local industry and community to prepare a Visitor Economy Growth Action Plan
- Prepare a roadmap to enhance international economic engagement and trade, working with Austrade and NSW Government
- Collaborate with all levels of government to deliver essential services and infrastructure to our growing communities across the Central Coast

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CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.2. Implementation Plan: Economic Partnerships

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Collaborate with all levels of government and the community to secure a City Deal for the Central Coast to support productive and liveable cities that encourage innovation, support growth and create jobs	<ul style="list-style-type: none"> Align priority advocacy projects with potential City Deals projects 	<ul style="list-style-type: none"> Priority projects are clearly identified and feature in any potential City Deals progression 	<ul style="list-style-type: none"> Federal Government NSW Government Regional Development Australia Central Coast Local Aboriginal Council 					
Develop a regional economic action plan with surrounding councils to leverage economic agglomeration	<ul style="list-style-type: none"> Engage with Surrounding Councils and identify key economic agglomeration opportunities and develop and action plan 	<ul style="list-style-type: none"> Key agglomeration programs and projects identified and documented for business case development Business cases developed Funding opportunities identified Grant funding secured and projects underway 	<ul style="list-style-type: none"> Regional Development Australia Central Coast Department of Premier and Cabinet Hunter and Central Coast Development Corporation Surrounding Councils Local Aboriginal Council 					
Collaborate with local industry and community to prepare a Visitor Economy Growth Action Plan	<ul style="list-style-type: none"> Engage with developers and tourism operators to gain an understanding of issues and opportunities relevant to tourism infrastructure investment Report on findings and potential strategies to overcome obstacles, attract & encourage good investment Prepare a detailed accommodation audit and implementation plan 	<ul style="list-style-type: none"> Meetings held with stakeholders to establish investment requirements Report produced Visitor economy stats Central Coast Accommodation audit complete with implementation plan Visitor Economy Stats International Visitor nights Domestic Visitor nights Domestic Daytrips 	<ul style="list-style-type: none"> Regional Development Australia Central Coast Destination Sydney Surrounds North, Department of Premier and Cabinet Tourism Operators Tourism Australia Local Aboriginal Council 					
Prepare a roadmap to enhance international economic engagement and trade, working with Austrade and NSW Government	<ul style="list-style-type: none"> Develop a marketing program to encourage business expansion and support the attraction of new business and industry to 	<ul style="list-style-type: none"> Target industries program developed 	<ul style="list-style-type: none"> Austrade Department of Premier and Cabinet 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
	<ul style="list-style-type: none"> the Central Coast with particular focus on High value industries such as health & medical, professional & scientific services, warehousing & logistics, and advanced (including food) manufacturing Ensure employment lands are appropriately zoned and serviced to accommodate target industry needs 	<ul style="list-style-type: none"> Planning Scheme aligns with target industry requirements Commercial Office Space vacancy rates Total commercial space supply Total Employment land supply and vacancy Measures of Central Coast Brand Reputation Inward investment Levels 	<ul style="list-style-type: none"> Central Coast Industry Connect NSW Department of Industry Business NSW 					
<p>Collaborate with all levels of government to deliver essential services and infrastructure to our growing communities across the Central Coast</p>	<ul style="list-style-type: none"> Continue to examine & trial innovative approaches to overcoming east-west connection to spine transport infrastructure Improve connections between residential and employment areas, including opportunities for better use public transport, walking and cycling modes. 	<ul style="list-style-type: none"> Infrastructure investment Level and utilisation of Infrastructure 	<ul style="list-style-type: none"> Department of Planning and Environment Transport for NSW Federal Government Hunter and Central Coast Development Corporation Roads Maritime Services NSW 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

2.3 ECONOMIC INFRASTRUCTURE

Goal: Physical and digital infrastructure are foundations of economic development, providing vital networks to support investment, trade, innovation and wellbeing. We are committed to building high-value local infrastructure, working with other governments and the private sector to expand the Central Coast's economic capacity. Key targets being, public transport network to allow the local population to access job opportunities as well as the available serviced employment lands to attract new employers to the region.

Rationale:

The Central Coast has significant tracts of zoned industrial land, however, much of it is in part or wholly constrained by environmental constraints, and/ or a lack of infrastructure. This means the effective available employment lands accessible by new businesses wanting to invest in and locate to the Central Coast are very limited. Identified employment land and activation precincts such as the Southern and Northern growth corridors. The Southern Growth Corridor links the Somersby Business Park and to Erina, providing services to the communities in the southern half of the region. The Northern Growth Corridor links Tuggerah to Warnervale to become a priority location for service and business growth.

Whilst the Central Coast is well connected via rail and major roads to Sydney and Newcastle, intra-regional transport is difficult, with only a north-south spine providing services. Transport from residential areas to employment areas without a car is difficult. This is made more complex by the natural structure and waterways. A lack of public transport options presenting difficulties in getting to/from potential work locations is cited as being largely attributable to the high local youth unemployment, even though employers in these regions cite skilled labour shortages as being a critical issue/ constraint.

The region needs a proactive and investment ready (supportive) planning framework and team that reflects the economic strengths and growth areas of the economy. Industries such as food product and housing component manufacturing, education and training, transport and logistics, health and medical precincts and industrial and commercial space in general need to be catered for and areas found for their expansion.

Priority Actions:

- Progress growth corridor development strategies
- Progress development strategies for Urban Release Areas
- Enhance local infrastructure with 'smart technology' to increase efficiency, connectivity and capacity
- Prepare a Central Coast Transport Strategy, highlighting priority transport infrastructure projects, over the short and longer term to achieve the 30-minute city
- Explore options to bring super-fast digital connectivity to the Central Coast (including optic fibre, mobile, and wireless networks).
- Work with local developers to modernise planning processes and requirements to future-proof our new developments
- Develop a dedicated, long-term Central Coast Infrastructure implementation plan to guide local planning and engagement with the State and Federal governments to clearly articulate the need and benefit



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.3. Implementation Plan: Economic Infrastructure

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Progress growth corridor development strategies	<ul style="list-style-type: none"> Unlock zoned employment and industry lands through effective planning processes and actions to deliver serviceability and accessibility Identification of constraints related to current zoning and assessment of actual total employment land space available Assessment of capability & timing to provide servicing to facilitate development 	<ul style="list-style-type: none"> Total accessible employment zone land clarified Serviceability and timing clarified New Serviced Employment land supplied annually Annual employment land occupation rate Annual Employment land Inquiry vs conversion rate Major Projects Planned Investment Confidence 	<ul style="list-style-type: none"> Department of Planning and Environment Local Aboriginal Council Darkinjung Department of Premier and Cabinet 					
Progress development strategies for Urban Release Areas	<ul style="list-style-type: none"> Identify Key growth urban areas and prepare the necessary infrastructure plans, ecological clearances and required funding for essential services to eliminate red tape, expedite and accelerate Urban growth 	<ul style="list-style-type: none"> Infrastructure investment Building approvals and completions New residential dwelling approvals and completions Number of residential subdivision approvals 	<ul style="list-style-type: none"> Department of Planning and Environment Local Aboriginal Council Darkinjung 					
Enhance local infrastructure with 'smart technology' to increase efficiency, connectivity and capacity	<ul style="list-style-type: none"> Preliminary report on adoption and integration of Smart City/Region technologies and activities into regional infrastructure and future planning 	<ul style="list-style-type: none"> Smart Region Strategy developed Level and utilisation of infrastructure 	<ul style="list-style-type: none"> Department of Planning and Environment Roads Maritime Services NSW Transport for NSW 					
Prepare a Central Coast Transport Strategy, highlighting priority transport infrastructure projects, over the short and longer term to achieve the 30-minute city	<ul style="list-style-type: none"> Continue to examine & trial innovative approaches to overcoming east-west connection to spine transport infrastructure Improve connections between residential and employment areas, including opportunities to better use public transport, walking and cycling modes. 	<ul style="list-style-type: none"> Demand Responsive Transport is expanded / enhanced to improve local transport requirements Future connection nodes and alternative transport modes are reflected in transport planning strategy Level and utilisation of infrastructure 	<ul style="list-style-type: none"> Department of Planning and Environment Roads Maritime Services NSW Department of Premier and Cabinet Private operators 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Explore options to bring super-fast digital connectivity to the Central Coast (including optic fibre, mobile, and wireless networks).	<ul style="list-style-type: none"> Work with telecommunication providers to ensure delivery of world class digital connectivity infrastructure and services, with a focus on Gosford CBD for 10GA connectivity to increase commercial office activity and associated employment Work with NBN and Telcos to bring the central Coast internet connection in line with greater Sydney 	<ul style="list-style-type: none"> Digital infrastructure spend Gosford CBD Mbs speed Average Central Coast Mbs speed Mobile coverage Households with internet connection NBN delivery and spend 	<ul style="list-style-type: none"> Telecommunication providers NSW Government Federal Government 					
Work with local developers to modernise planning processes and requirements to future-proof our new developments	<ul style="list-style-type: none"> Engage with Central Coast investors and developers with a specialised consultant to workshop best practice planning pathways benchmarked against all NSW LGA's 	<ul style="list-style-type: none"> Non-residential building approval timeframes (By type) Major Projects Planned completions 	<ul style="list-style-type: none"> Commercial Property agents Department of Planning and Environment Private investors Local Aboriginal Council Darkinjung 					
Develop a dedicated, long-term Central Coast Infrastructure implementation plan to guide local planning and engagement with the State and Federal governments to clearly articulate the need and benefit	<ul style="list-style-type: none"> Identify the regions long term infrastructure priorities in collaboration with surrounding Councils, private sector, state government and federal government and sort the order of preference and implementation pathway Develop a regional investment prospectus for national and global markets to profile infrastructure and commercial investment opportunities in the region 	<ul style="list-style-type: none"> Long term infrastructure priorities identified Business cases complete Implementation and priority plan complete Funding secured for priority infrastructure Investment prospectus developed for national and international marketing 	<ul style="list-style-type: none"> Commercial Property agents Department of Planning and Environment Private investors Local Aboriginal Council Darkinjung Regional Development Australia Central Coast Federal Government NSW Government Central Coast Industry Connect Business NSW 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

2.4 ECONOMIC INNOVATION & ENTERPRISE

Goal: Local business and enterprise are the drivers of economic development, powering employment, innovation, and investment. We are committed to supporting a thriving business and innovation eco-system, creating new jobs, commercial profit and community value for the Central Coast.

Rationale:

The Central Coast has strong representation in advanced manufacturing, health care and social assistance, retail trade, accommodation and food services, construction but is also poised to benefit from the emerging sectors in education and training, professional scientific and technical services, logistics and transport, financial and insurance services and the visitor economy. We can begin to build the future of tomorrow by mobilising the students of today to be ready for tomorrow through working with established industries and capitalising on the emerging high growth industries.

Priority Actions:

- Work with the local innovation eco-system to establish a Central Coast Innovation Network
- Start a digital education and accelerator program for all primary and secondary public schools on the Central Coast
- Establish and partner with Universities to foster collaboration and attraction of new high value industry and to enhance existing established industry
- Identifying precincts and sectors with high growth prospects, and preparing roadmaps to drive this economic development
- Develop an internal Innovation Policy Framework for Council
- Transform Council's innovation and business development programs to enhance local impacts and outcomes
- Prepare a roadmap to drive economic vibrancy and diversity, exploring options such as events, city activations, better design, place-making, and promotion and utilisation of natural areas
- Build on existing advanced manufacturing and food innovation to enhance and promote business excellence
- Prepare a health innovation business case to compliment the growing health economy

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CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.4. Implementation Plan: Economic Innovation & Enterprise

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Work with the local innovation ecosystem to establish a Central Coast Innovation Network	<ul style="list-style-type: none"> Engage with existing business clusters to build upon specialised knowledge and innovation to enhance existing networks Work with existing leaders within in high value target industries to establish new innovation cluster networks 	<ul style="list-style-type: none"> Business Counts (Total and Key Industries) Intellectual Property Registrations Business stats Measure of innovation activity and outcomes 	<ul style="list-style-type: none"> Business NSW Local Chambers of Commerce Central Coast Industry Connect UON Industry Central Coast Local Health District 					
Start a digital education and accelerator program for all primary and secondary public schools on the Central Coast	<ul style="list-style-type: none"> Engage with Central Coast Public primary and tertiary schools to develop the Central Coast digital accelerator program Develop investment prospectus to fund a computer for every student on the Central Coast Engage and enrol 	<ul style="list-style-type: none"> Schools enrolled in Digital accelerator program School Containment rate Completed high school Post School Qualifications Proportion of Residents Attending Educational establishments Technology Literacy and access Distribution of educational attainment 	<ul style="list-style-type: none"> Central Coast Industry Connect Business NSW TAFE UON P-TECH NSW Department of Education 					
Establish and partner with Universities to foster collaboration and attraction of new high value industry and to enhance existing established industry	<ul style="list-style-type: none"> Build a register of the regions key employers by size/ industry Schedule regular engagement focussed on growth, activity and skills requirements Actively engage with local business networks and Chambers to ensure two-way communication is established and maintained Engage with industry to identify leaders in high value industries and 	<ul style="list-style-type: none"> Talent retention measures Inward investment levels Economic Diversity measures Creative economy measures Post School Qualifications Proportion of Residents Attending Educational establishments Distribution of educational attainment Completed high school 	<ul style="list-style-type: none"> University of Newcastle Business NSW TAFE NSW Central Coast Industry Connect Regional Development Australia Central Coast Department of Premier and Cabinet 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
	<ul style="list-style-type: none"> an education pathway to bridge skills gap is identified Engage with universities to identify future and existing education programs to partner and support industry 	<ul style="list-style-type: none"> Register of key employers and industries collated 						
Identifying precincts and sectors with high growth prospects, and prepare roadmaps to drive economic development	<ul style="list-style-type: none"> Develop and aggressively implement industry and investment plans for each of the high-value industries identified in EDS- focussing on addressing impediments to growth, workforce requirements, supply chains, skills gaps, education alignment, market opportunities and the identification of key investment targets Develop a clear investment proposition with appropriate incentives and compelling marketing materials for each high-value industry to attract and generate new investment 	<ul style="list-style-type: none"> Economic activity and income levels Congestion and commuting measures Productivity stats Labour Market stats Detailed market analysis with implementation plan developed for high value industries Investment plans and marketing material complete Investment Targeted marketing campaign deployed Annual high value Inquiry vs conversion rate 	<ul style="list-style-type: none"> Regional Development Australia Central Coast Central Coast Industry Connect Central Coast Food Innovation Cluster Department of Premier and Cabinet Business NSW Local Chambers of Commerce NSW Department of Industry 					
Develop an internal Innovation Policy Framework for Council	<ul style="list-style-type: none"> Conduct an audit of council's current innovation practices and business processes. Develop a framework for business improvement and a change management process to introduce an innovation framework 	<ul style="list-style-type: none"> Council is easy to do business with DA Approval timeframes Customer satisfaction levels Investment attraction 						
Transform Council's innovation and business development programs to enhance local impacts and outcomes	<ul style="list-style-type: none"> Develop an annual implementation and engagement plan for business development focused on new business attraction in high value industries and retention of existing industry 	<ul style="list-style-type: none"> Measures of Central Coast brand/ reputation as a place to do business 	<ul style="list-style-type: none"> Department of Premier and Cabinet Business NSW Local Chambers of Commerce 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
<p>Prepare a roadmap to drive economic vibrancy and diversity, exploring options such as events, city activations, better design, place-making, and promotion and utilisation of natural areas</p>	<ul style="list-style-type: none"> Support and encourage development of the Gosford CBD and waterfront to provide cultural, leisure, entertainment and commercial opportunities for our residents Investigate the potential of a Conference and Convention Centre to further enhance the Gosford CBD and Waterfront Precinct area capabilities and access the lucrative MICE market and attract short term accommodation development Develop relationships with national and international commercial property agents to assist in soft promotion of activities Encourage sensitive design and development that takes advantage of our natural areas providing leisure opportunities for our residents and tourism attraction potential Complete detailed town centre streetscape design incorporating smart infrastructure, parking and design manuals that are sympathetic to each town centre and CBD Niche focused event program developed that puts the Central Coast on the Map. 	<ul style="list-style-type: none"> Gosford CBD investment plan complete and actively marketed to attract investment Industry connections established Business cases prepared Conference facilities established in Gosford CBD Waterfront precinct Masterplan adopted Individual investment plans complete for Central Coast CBD's Design manuals for town centres complete Carpark manual complete for each town centre Streetscape design complete for each town centre Niche focused event with attendee numbers Measures of Wellbeing and happiness 	<ul style="list-style-type: none"> NSW Department of Industry Regional Development Australia Central Coast Central Coast Industry Connect Business NSW Local Chambers of Commerce Local businesses Destination Sydney Surrounds North Conferencing & Events Industry Hunter and Central Coast Development Corporation Tourism Operators Local Aboriginal Council 					
				<p>Build on existing advanced manufacturing and food innovation to</p>	<ul style="list-style-type: none"> Measures of innovation activity and outcomes Business stats 	<ul style="list-style-type: none"> Regional Development Australia Central Coast Central Coast Industry Connect 		



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
enhance and promote business excellence	<ul style="list-style-type: none"> upon and support the specialised manufacturing industries 	<ul style="list-style-type: none"> Growth in advanced manufacturing industries 	<ul style="list-style-type: none"> Central Coast Food Innovation Cluster 					
Prepare a health innovation business case to compliment the growing health economy	<ul style="list-style-type: none"> Engage with NSW Local Area Health, NSW Health and established businesses on the Central Coast and outside the Central Coast to establish the framework of a health innovation precinct. 	<ul style="list-style-type: none"> Health, safety, justice and social indicators Increases in Health-related business start-ups Employment numbers in non-service-based health jobs Intellectual property measures Measures of innovation and activity outcomes 	<ul style="list-style-type: none"> NSW Area Health Central Coast Local Area Health Regional Development Australia Central Coast Central Coast Industry Connect 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

2.5 ECONOMIC FUTURES

Goal: The digital revolution is driving incredible changes to economies and communities the world over, presenting a host of new opportunities and challenges. We are committed to future economy leadership, leveraging digital technology and new economic opportunities for a stronger Central Coast.

Rational:

For the Central Coast to achieve the 30-minute city, digital infrastructure is the foundation of a smart city which draws its people into the CBDs for high value work and retains existing industry and attracts new innovative industry. With 65% of children now entering school projected to hold jobs that currently don't exist the promotion and facilitation of digital literacy coupled with smart infrastructure will enable the Central Coast workforce to pivot positively towards the emerging economy of the future.

The children and youth of today play a key role in mobilising towards the emerging future economy. It is imperative that we engage, collaborate and assimilate what the future generation desire. It is essential that we provide exciting opportunities and activities locally that attract and retain the younger generation after leaving school.

Priority actions:

- Prepare a Night-Time Economy discussion paper, exploring options for enhancing the diversity and size of our night-time economy
- Develop and implementing a Central Coast Future City (Smart Technology) road map
- Work with industry and community to promote 'smart working' (e.g. remote/flexible/co-working) opportunities for the Central Coast
- Promote programs to improve digital literacy and skills for all primary and secondary public schools and for businesses and the broader community
- Establish a framework to optimise the economic value of 'big data' for the Central Coast
- Prepare a youth engagement action plan for enrolment and education to enhance human capital, capacity building, employment opportunities and participation

DRAFT SUBJECT TO COUNCIL ENDORSEMENT



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.5. Implementation Plan: Economic Futures

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Prepare a Night-Time Economy discussion paper, exploring options for enhancing the diversity and size of our night-time economy	<ul style="list-style-type: none"> Develop and implement planning policy that encourages centres activity and the built form to support activated, interactive and open space 	<ul style="list-style-type: none"> Night-time economy cost benefit analysis complete Night-time economy discussion paper developed with baseline research International Evidence Review Establish advisory board Night time economy and event stats 	<ul style="list-style-type: none"> Department of Planning and Environment Sydney City Council 					
Develop and implementing a Central Coast Future City (Smart Technology) road map	<ul style="list-style-type: none"> Develop a Smart Region strategy to enhance and enable hard and soft infrastructure that will support more effective servicing and accessibility for community, business and industry Preliminary report on adoption and integration of Smart City/ Region technologies and activities into regional infrastructure and future planning 	<ul style="list-style-type: none"> Smart Region Strategy developed 	<ul style="list-style-type: none"> Department of Planning and Environment Private industry 					
Work with industry and community to promote 'smart working' (e.g. remote/flexible/co-working) opportunities for the Central Coast	<ul style="list-style-type: none"> Engage with existing co-work industry providers and Sydney employers with a high representation of commuters to determine synergies 	<ul style="list-style-type: none"> Health, safety, justice and social indicators Measures of wellbeing and happiness Congestion and commuting measures 	<ul style="list-style-type: none"> Private industry 					
Promote programs to improve digital literacy and skills for all primary and secondary public schools and for businesses and the broader community	<ul style="list-style-type: none"> Engage with local education providers to establish baseline digital education programs currently offered to the community. Engage with local industry and target industry to establish required education for digital literacy. Engage with community to determine level of digital literacy levels 	<ul style="list-style-type: none"> Post School qualification levels Technology literacy and access Distribution of educational attainment New digital start-ups % employed in digital industries 	<ul style="list-style-type: none"> TAFE NSW Department of Education University of Newcastle 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Establish a framework to optimise the economic value of 'big data' for the Central Coast	<ul style="list-style-type: none"> Determine data sharing with various agencies and what will be accessible. Engage with the private sector to determine data usage Review and benchmark other LGA data sharing and collection policies 	<ul style="list-style-type: none"> Development of smart industries that provide innovation using data Measures of innovation activity and outcomes 	<ul style="list-style-type: none"> NSW Government Federal Government Private Sector 					
Prepare a youth engagement action plan for enrolment and education to enhance human capital, capacity building, employment opportunities and participation	<ul style="list-style-type: none"> Engage with schools and youth to determine issues with finding employment post school and other related issues faced by youth. Develop in consultation with youth leaders a framework to assist with youth engagement and to provide more employment opportunities and education opportunities 	<ul style="list-style-type: none"> Measures of economic inclusion/equity Youth unemployment rate Youth employment participation rate University enrolment TAFE enrolment Apprentices 	<ul style="list-style-type: none"> NSW Department of Education TAFE University of Newcastle 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

2.6 ECONOMIC TRANSFORMATION

Goal: In a fast-paced global economy, retaining competitiveness and meeting changing community expectations depends on continuing economic transformation. We are committed to progressing such reform – of economic systems, regulations, and frameworks – to ensure the ongoing strength and sustainability of the Central Coast's economy.

Rationale:

Encouraging established businesses to invest further and attracting new investments to the region enables governments to stimulate employment and develop the economy and in doing so, drive accelerated job growth and prosperity. Governments support investment (existing business expansion and new investment) primarily by developing a business environment that is attractive and by promoting the attributes of their region as an investment location. Council may, in some instances, provide incentives (financial and non-financial) and other services to support and encourage investment. There are a range of investment attraction incentives local government can pursue to attract, support and encourage investment

A local government that is supportive of business investment and is proactive in its planning policy and development approvals will be seen as a cooperative, supportive and attractive investment ally. Disinterest, confused processes and changeable rules all present strong signals to investors that it will be better to invest elsewhere.

For a local government to fully embrace business and industry support and investment attraction it must be appropriately resourced.

Priority Actions:

- Identify high value regulatory reform and 'red tape' reduction initiatives to unlock economic growth
- Develop a 'Circular Economy' framework to build our sharing economy
- Explore options to accelerate the production and consumption of renewable energy to power the Central Coast economy
- Prepare an economic roadmap for the Central Coast to progress the UN's Sustainable Development Goals (SDGs)
- Prepare a framework to incentivise to attract new high value corporate commercial business and partner with Government, to attract Government institutions to relocate to the region in order to lead the revitalisation of the CBDs and enhance the employment diversity of the region



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Table 2.6. Implementation Plan: Economic Transformation

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Identify high value regulatory reform and 'red tape' reduction initiatives to unlock economic growth	<ul style="list-style-type: none"> Review internal handling of commercial and industrial enquiries and development approvals Make recommended changes where required to assist in facilitation of potential investments and business enquiries" 	<ul style="list-style-type: none"> Internal processes reviewed Recommendations made and positively effected 	<ul style="list-style-type: none"> Services NSW Making Business Better 					
Develop a 'Circular Economy' framework to build our sharing economy	<ul style="list-style-type: none"> Engage with the private sector and government to determine a framework to adopt Identify possible land to form a cleantech Green cluster of businesses that are focused on innovation and reuse of resources Establish incentives to attract organisations engaged in the Circular economy framework to relocate or establish themselves in the region Develop a region wide approach to address waste and reuse 	<ul style="list-style-type: none"> Greenhouse gas emissions per capita Quality of natural environment Efficiency of resource usage Business start-up and relocation of cleantech companies Measures of innovation activity and outcomes 	<ul style="list-style-type: none"> Private Sector Regional Development Australia Central Coast Central Coast Industry Connect Central Coast Food Innovation Cluster Department of Premier and Cabinet Business NSW Local Chambers of Commerce NSW Department of Industry 					
Explore options to accelerate the production and consumption of renewable energy to power the Central Coast economy	<ul style="list-style-type: none"> Engage with industry and government to explore options to deploy renewable energy on the Central Coast Adopt a renewable energy approach for the Central coast 	<ul style="list-style-type: none"> Greenhouse gas emissions per capita Quality of natural environment Efficiency of resource usage 	<ul style="list-style-type: none"> Private Sector Regional Development Australia Central Coast Central Coast Industry Connect Central Coast Food Innovation Cluster Department of Premier and Cabinet Business NSW Local Chambers of Commerce 					



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY – IMPLEMENTATION PLAN

Priority Action	Supporting Actions	Measure	Partners	Year				
				1	2	3	4	5
Prepare an economic roadmap for the Central Coast to progress the UN's Sustainable Development Goals (SDGs)	<ul style="list-style-type: none"> Review UN's 17 sustainable Development goals framework and develop a roadmap that aligns the Central Coast with the UN's 	<ul style="list-style-type: none"> Roadmap and implementation plan complete Measures of economic inclusion/equity 	<ul style="list-style-type: none"> NSW Department of Industry 					
Prepare a framework to incentivise to attract new high value corporate commercial business and partner with Government, to attract Government institutions to relocate to the region in order to lead the revitalisation of the CBDs and enhance the employment diversity of the region	<ul style="list-style-type: none"> Actively market and promote opportunities for development and activation within the CBD and Waterfront Precinct Develop relationships with national & international commercial property agents to assist in soft promotion of opportunities Develop collateral & marketing program to support the scheme and investment attraction policies Develop a marketing program to encourage business expansion and support the attraction of new business and industry to the Central Coast with particular focus on health & medical, professional & scientific services Develop an investment attraction incentive scheme that supports activity where positive economic outcome criteria are met, i.e. new jobs, preferred developments such as A grade office accommodation 	<ul style="list-style-type: none"> New Commercial Building Approvals and completions Commercial Office Space supply Commercial Office Space vacancy Serviced Employment land supply Employment land vacancy 	<ul style="list-style-type: none"> Department of Planning and Environment Commercial property agents Institutional investors 					



ECONOMIC
DEVELOPMENT
STRATEGY

DRAFT
DIRECTORIAL
COUNCIL ENDORSEMENT

TECHNICAL APPENDICES

JUNE 2019





CENTRAL COAST COUNCIL ECONOMIC DEVELOPMENT STRATEGY – TECHNICAL APPENDICES

FOR THE READER

This document provides a summary of the background information and analysis which informed the development of the Central Coast Economic Development Strategy. This document should be read and considered in the context of the findings of the strategy and includes:

- A socio-economic profile of the Central Coast local government area (**Appendix A**)
- A competitive assessment for the local government area (**Appendix B**)
- A comparative assessment, comparing Central Coast local government area to Greater Geelong, Newcastle and the Sunshine Coast (**Appendix C**).

Sources:

Appendix A has been sourced profile ID Central Coast unless otherwise noted. This is at the request of Central Coast Council that all data be collected from Profile ID. Appendix B and C have used sources from the Australian Bureau of Statistics (ABS) as well as AEC collated data.

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Disclaimer:

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CENTRAL COAST COUNCIL ECONOMIC DEVELOPMENT STRATEGY – TECHNICAL APPENDICES

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APPENDIX A: REGIONAL PROFILE

This section provides an overview of local industry and key projects for the Central Coast Local Government Area.

CHARACTERISATION OF CENTRAL COAST ECONOMY

Industry Sector Analysis

Private Sector Breakdown

Manufacturing

Traditionally, manufacturing has been a strong employing sector in Central Coast employing 6.8% of total employees by place of work in 2016 and the fourth largest industry by Gross Value Add (GVA) with 8.9% of total GVA. Whilst it is the sixth largest employer by total employment, it is the fourth by Full Time Equivalent (FTE) employment, employing 8.8% of the regions FTE employment. The major manufacturing sub-industries (by total employment) were other wood product manufacturing, grain mill and cereal product manufacturing, bakery product manufacturing, structural metal product manufacturing and fruit and vegetable product manufacturing. Most jobs in manufacturing are filled by locals with 86.7% of manufacturing jobs being from people living in Central Coast and working there. Despite the overall growth of the Central Coast economy, manufacturing's GVA has seen declines since 2013-14, however, the presence of high-profile businesses particularly in food and beverage product manufacturing suggests there are opportunities for development in this sector going forward.

Building Construction and Trades

The construction industry was the third largest employing industry in 2016, employing approximately 10.2% of total workers. By FTE it was the second largest employer, with 13.1% of FTE employment in Central Coast. Due to the large number of people being employed in construction, it is the third highest industry of people living in Central Coast and working there (10,219 people in 2016), however it is the largest industry for people living in Central Coast and working elsewhere with over 6,200 people leaving in 2016. Construction is also the third largest industry in terms of contribution to total GVA, at 7.8%. The industry has grown faster than the overall economy over the last 10 years, growing annually by 3.0% compared to 2.1%. Despite the considerable growth, building completions (from development approval to building completion) have been low, being 60.7% in 2018.

Tourism and Hospitality

Tourism is a major sector in Central Coast, attracting over 5 million visitors in 2017-18 with the average length of stay being 3.1 nights. The main reason for visitors travelling to Central Coast is for a holiday with 43.7% of visitors coming for this reason, whilst a similar proportion also came to visit friends and relatives (39.4%). Accommodation and food services employs a large proportion of part time and casual workers. Accommodation and food services was the fourth largest industry by total employment in 2016, employing 8.8% of workers, whereas it employs 6.5% of employment by FTE. Tourism also causes expenditure in a variety of industries and can stimulate the local economy.

Professional Services

Professional, scientific and technical services employed approximately 4.8% of workers in Central Coast with financial and insurance services employing 2.3% of people. Professional, scientific and technical services account for 5.7% of GVA whilst financial and insurance services accounts for 6.3% of GVA showing that it is a high value industry to the region. Over a third, (38%) of Central Coast residents who worked in professional, scientific and technical services commuted outside the LGA for work in 2016. This figure represents 7,500 workers out-commuting and working in this industry (Bill, A & Jonita, M, 2019). Over half (51.5%) of Central Coast residents who worked in finance and insurance commuted outside the LGA for work in 2016. This figure represents approximately 4,700 workers out-commuting to work in this industry in 2016.



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Retail

The retail trade sector is a major employer in Central Coast, employing 12.5% of total workers in 2016 but 10.2% by FTE employment. Its contribution to GVA was 7.9% in 2016-17, the fifth largest of all sectors and 2.2 percentage points higher than the state's contribution.

Agriculture

Agriculture is a small sector in the Central Coast Economy employing approximately 1.0% of its workforce in 2016 and accounting for 1.1% of Gross Value Added (GVA) in 2017-18. The most prominent commodities produced by value include poultry, nurseries, cut flowers or cultivated turf, tomatoes and avocados. Sheep, grains and dairy cattle is the region's second largest import due to the food manufacturing businesses that are located in Central Coast.

Private Health Services

There are multiple private hospitals in Central Coast including Gosford Private Hospital, Berkeley Vale Private Hospital.

Public Sector Breakdown**Health Services**

Health care and social assistance is the largest employing industry in Central Coast, accounting for almost 20% of all workers. It is the second largest industry following ownership of dwellings in terms of GVA contribution. Public hospitals in the region include the newly redeveloped Gosford Hospital, Long Jetty, Woy Woy and Wyong.

Government Agencies and Services

Public administration and safety employ 5.2% of workers in Central Coast, whilst contributing to 3.9% of GVA.

Education

Central Coast had a poor high school completion rate in 2016 with just 44.0% of people completing year 12 compared to 57.0% in New South Wales. Levels of higher education attainment are lower in Central Coast than the State with more than half not having a qualification. Approximately 23.2% of people have an advanced diploma or higher qualification compared to the State's 31.8%. Education and training accounts for 5.9% of GVA.

Recent and Proposed Developments and Economic Growth

The following table provides an overview of key projects planned for the region. In 2018, Central Coast saw just 60.7% of its approved development applications completed (2-year delay used to calculate rate).

Table A. 1. Major Projects

Project	Project Phase	Project Costs
Pacific Highway Through Wyong	Roads and Maritime Services have commenced investigations for the Pacific Highway upgrade through the Wyong Town Centre. Design work and further community consultation has not yet commenced.	\$100,000,000
Tuggerah Precinct Activation	Initial precinct planning has been undertaken in collaboration with Central Coast Council, NSW Government agencies and regional stakeholders.	\$220,000,000
Central Coast Resource Recovery Facility	Concept designs and construction cost estimates have been completed.	\$53,000,000
Warnervale Town Centre Water and Sewer	Design stage complete.	\$8,728,847
Link Road, Warnervale	The first stage of the Link Road at the northern end from Sparks Road has been constructed. Roads and Maritime Services have developed a strategic design for the Link Road and upgrade of Pacific Highway. Roads and Maritime Services have proposed to progress Stage 2 of that strategic design at this time.	\$360,000,000



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Project	Project Phase	Project Costs
Mardi to Warnervale Pipeline	The project follows a number of previous planning studies which identified the need for the pipeline and confirmed required sizing prior to Council undertaking full detailed design and environmental assessment.	\$58,000,000
Mardi Water Treatment Plant Upgrade	The requirement for the upgrade has been confirmed during the preparation of a network water quality strategy prepared by Council in 2015. A business case has been developed supported by significant analysis and modelling.	\$24,400,000
Ettalong Beach Ferry Wharf	The project will require a three-year implementation program which includes concept design, stakeholder engagement, detailed design and construction activities.	\$6,755,083
Gosford CBD Revitalization	Preliminary designs are currently available to commence public domain and streetscape improvements on Baker Street between Donnison Street and Georgiana Terrace. The remaining projects will require a five-year implementation program subject to funding and the coordinated staging of other revitalisation.	\$70,700,000
Rawson Road Level Crossing Replacement	This project will require a five-year implementation program which includes concept development, detailed design and construction activities. An extended program is required due to the size and complexity of the project including rail under or overpass, property acquisitions, external approvals and significant environmental constraints.	\$152,000,000
Wiseman Ferry Road Upgrade	The project has developed design drawings for the full restoration of two travel lanes on Wisemans Ferry Road, Gunderman at both embankment failure sites.	\$9,800,000
Woy Woy Peninsula Drainage	Stage 1 and 2 of the projects are completed. Stage 3 to 11 of the project will be detail designed in 2018.19. The remaining stages will require a six-year implementation program due to easement acquisitions and the extent of the drainage improvement works required.	\$10,000,000
Woy Woy Town Centre Wharf	This project will require a two-year implementation program which includes detailed design, stakeholder engagement and construction activities.	\$5,320,000
Central Coast Regional Sporting and Recreation Complex	Stage 2 design and approvals are complete. Construction phase and timeline is dependent on securing funding.	\$29,849,916

Source: Central Coast Council (2018).



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SOCIO-ECONOMIC INDICATORS

This chapter provides an overview of the key socio-economic data points for Central Coast local government area.

Current and Projected Population

Central Coast's population reached just over 342,000 people in 2018. The local population has grown at a slower rate than Greater Sydney in the past year, growing by 0.8% in 2018 compared to 1.8% in Greater Sydney. The Central Coast population has an older age distribution than the state. Approximately 18.8% of the population were aged between 0 and 14 years, and 12.0% were aged between 15 and 24 years. However, ages 25-64 years account for almost half the population, and 20.3% of the population were aged 65 and over. Approximately 48.9% of Central Coast residents were male and 51.1% were female (ABS, 2018b). Populations with an older average age are associated with increased demand for aged care and health care services.

Population growth in Central Coast is anticipated to grow over the coming years. Population growth estimates suggest the local population is likely to increase to 414,615 by 2036. This represents growth of 20% from current levels, an average annual growth of 1.1%.

Migration

Almost 85% of people living in Central Coast also lived in the LGA 5 years ago (ABS, 2017). The next highest proportion of residents previously lived overseas before moving to Central Coast at 2.0% of residents. People moving from LGAs in Greater Sydney followed with Hornsby at 0.9% and Blacktown at 0.8%.

Indigenous Community

In 2016 there were 12,489 indigenous people living in Central Coast or 3.8% of the total population. Approximately 86.2% of indigenous people were employed in Central Coast, a higher proportion than the state which has 84.7% of its indigenous population employed. Indigenous residents in Central Coast also had a higher high school completion rate than New South Wales indigenous population at 30.6% compared to 28.4%, however this is still lower than the Central Coast average of 40.3%.

Gross Regional Product

Local Gross Regional Product was recorded at \$13.5 billion in 2018, following growth of 2.8% from 2017. The local economy expanded at a faster pace than New South Wales, which expanded by 1.9%. The local economy has expanded by 3.7% annually since 2015, driven by expansion in the construction and health care and social assistance sectors.

Gross Value Added

In 2017-18 the strongest industries in Central Coast by GVA were health care and social assistance (14.5% of GVA), manufacturing (8.9%) and retail trade (7.9%). The structure of the economy is vastly different to Greater Sydney which most prominent industry is financial and insurance services, followed by professional, scientific and technical services.



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Figure A. 1. Industry Proportion of GVA, 2017-18



Source: Economy ID (2018).

Productivity Changes

Since 2012-13 mining has had the most improvement in productivity followed by financial and insurance services, rental, hiring and real estate services and wholesale trade. Industries that have seen a decline in productivity over this period were electricity, gas, water and waste services, transport, postal and warehousing and agriculture, forestry and fishing.

Labour Force

In the March quarter of 2019, Central Coast approximately 174,231 local resident workers. In the year ending June 2018 there were 126,459 jobs located in the Central Coast Council area, an increase of 3.7% from the previous year, however this growth is lower than the States growth of 4.2% over the same period. Unemployment in the March quarter of 2019 was 5.3% which is higher than the state unemployment rate of 4.3%. In 2016, 43.4% of the workforce worked part-time (34 hours or less), and 54.7% worked full-time (35 hours or more), compared with 34.9% and 63.1% respectively for New South Wales.

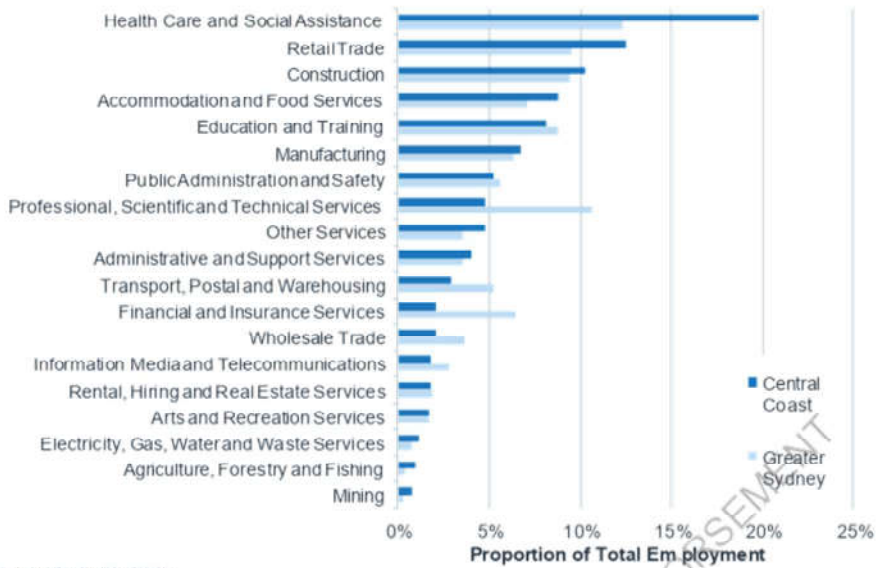
Employment by Industry (Total Employment)

Health care and social assistance was the largest employing industry (by total employment) in Central Coast in 2017-18 with 19.8% of employment. Retail trade and construction followed, with all three industries having a higher proportion of employment than Greater Sydney.



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Figure A. 2. Employment by Industry 2017-18

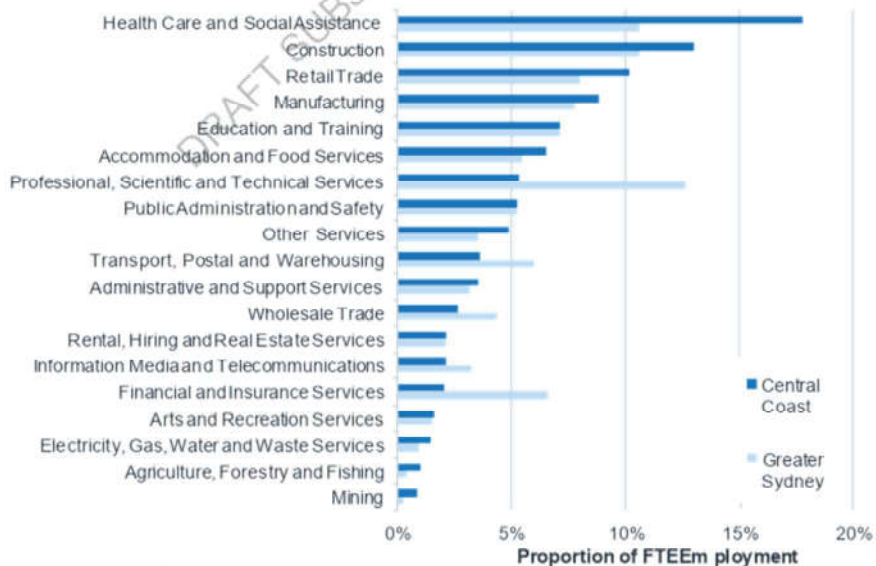


Source: Profile ID (2019).

Employment by Industry (FTE)

Health care and social assistance was the largest employing industry by full time equivalent (FTE) workers in Central Coast in 2017/18. Health care and social assistance accounts for a significantly higher proportion of the FTE workers in Central Coast than Greater Sydney at 10.6%. Following this was construction at 13.1% and retail trade at 10.2%. The largest difference between Greater Sydney and Central Coast was in professional, scientific and technical services which is the largest employer by FTE in Greater Sydney but is the seventh largest in Central Coast.

Figure A. 3. Employment by Industry (FTE) 2017-18



Source: Profile ID (2019).

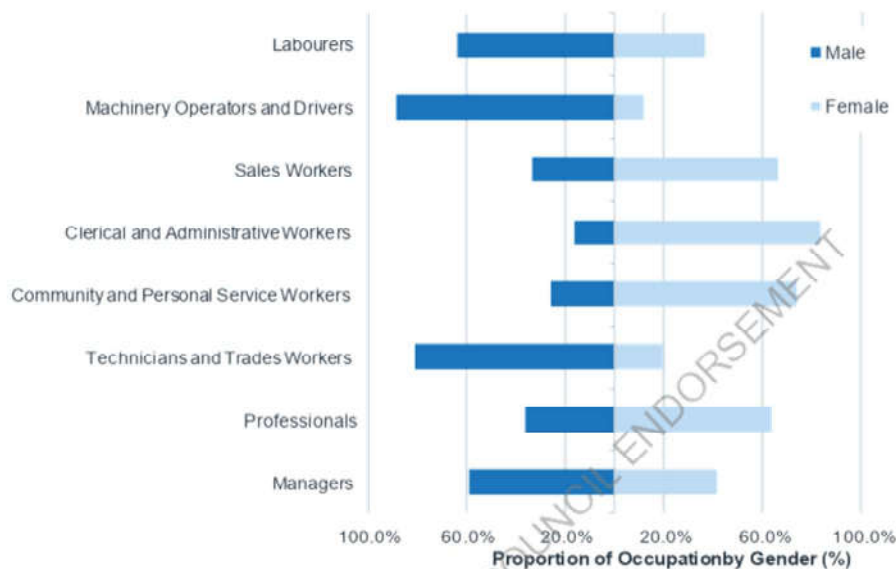


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Occupation by Gender (Place of Work)

In 2016, the Central Coast workforce was comprised of 45.9% males and 54.1% females. Male dominated occupations included managers but were primarily trades-related occupations such as technicians and trade workers, machinery operators and drivers as well as labourers. Females dominated occupations included professionals, clerical and administrative workers and community and personal service workers (ABS, 2018b).

Figure A.1. Occupation by Gender, 2016



Source: ABS (2017).

Industry Composition

The industry composition data provided for analysis groups industries into household services, business services and goods related, with separate industries for public administration and safety, agriculture, forestry and fishing and mining.

Household services include accommodation and food services, education and training, health care and social assistance, arts and recreation services and other.

Business services include information media and telecommunications, financial and insurance services, rental, hiring and real estate services, professional, scientific and technical services and administrative and support services.

Goods related include manufacturing, electricity, gas, water and waste services, construction, wholesale trade, retail trade and transport postal and warehousing.

The highest employing sector in the Central Coast Local Government Area (LGA) in 2018 was household services accounting for 43.2% of employment. This area has significantly increased its importance to the region, increasing by 5.8 percentage points over the last 10 years. Goods related is the second largest sector at 35.3% followed by business services at 14.5%. Public administration and safety composed of 5.3% of employment in the region. Smaller sectors of agriculture, forestry and fishing has 1.0% of employment whilst mining has 0.7%.

Building Approvals & Completions

The value of building approvals in the Central Coast LGA in the 2018-19 June financial year to date was \$788. In the year ending June 2019 the residential building approval value was \$563 million with the non-residential building approval value being \$225 million totalling \$948 million.



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In the year ending June 2018, the completion rate was 60.7% (assuming a 2-year delay from approval to completion) DPE (2018b).

Household Income

The average household income in the Central Coast was \$1,594 in 2016. This is \$295 less than the New South Wales average household income.

Housing

In 2018 the median house value in the Central Coast LGA was \$690,084, significantly lower than Greater Sydney at \$1,053,944 and lower than the New South Wales median at \$740,444. The median price of units was \$491,484, lower than Greater Sydney at \$752,913 and New South Wales at \$676,368. Despite being lower than Greater Sydney the median house multiple in Central Coast was 6.8 whilst for units the median multiple was 5.1. The median multiple is used to indicate the affordability of housing in a community. It is the ratio between median house price and the median household income. The international housing affordability survey determines that a median multiple of 5.1 and over is severely unaffordable (Demographia 2019).

The median weekly rental payment for a house in 2018 in the Central Coast LGA was \$425 per week, lower than Greater Sydney's \$530 per week and just lower than New South Wales at \$465 per week. Median unit rental payments were \$390 per week in Central Coast in 2018 compared to \$525 per week in Greater Sydney and \$490 per week in New South Wales.

In Central Coast 9.3% of households were in mortgage stress (are low income households/ bottom 40% of income distribution who spend more than 30% of income on mortgage or rental payments) slightly higher than the New South Wales average of 9.6%, whilst 34.8% of households were in rental stress compared to New South Wales at 27.9%. (PHIDU, 2018).

Household Type

In 2016, 67.7% of households in Central Coast were family households. The next highest proportion was lone person households comprising of 25.1% of households. Group households accounted for 2.9%.

Retail Trade

In December 2018 retail trade turnover in New South Wales was \$8.7 billion which is an increase of 2.1% from the previous year.

Consumer Price Index

In the year to December 2018, the CPI for Sydney increased 1.7%. During the same period, the CPI for the eight capital cities in Australia increased 1.8% p.a.

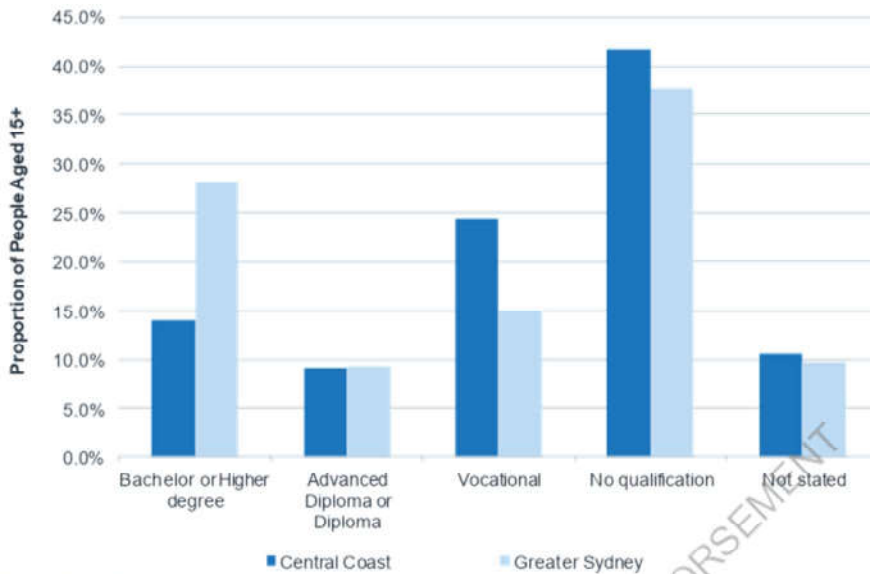
Level of Education

In the Central Coast, 40.3% of people completed high school compared to 60.0% in Greater Sydney. Bachelor's degree or higher was significantly below the Greater Sydney average whilst a higher proportion of people had no qualification, highlighting the lower education levels in Central Coast. Approximately 3.1% of people in Central Coast were attending university whilst 6.1% attending university in Greater Sydney.



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Figure A. 4. Non-School Qualifications



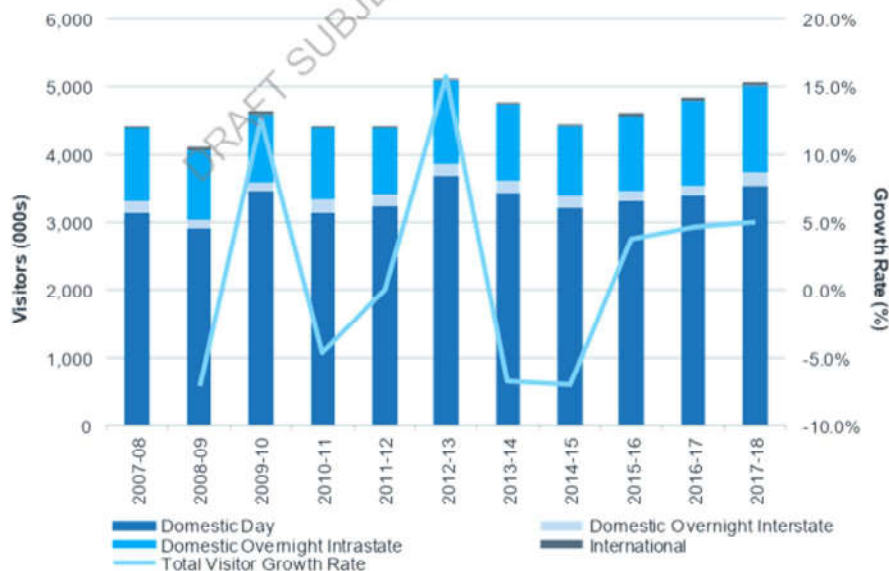
Source: Profile ID (2019).

Tourism

Visitation

In 2017-18 there were just over 5 million visitors to the Central Coast. The majority of visitors were domestic day trippers accounting for almost 70% of visitation. Domestic overnight visitors from within New South Wales accounted for approximately a quarter of visitors. Domestic overnight interstate visitors accounted for just 3.8% of visitation whilst international visitors comprised 1.3% of visitors (TRA, 2018).

Figure A.2. Visitation by Type, Central Coast.



Source: TRA 2018a, TRA 2018b.



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Nights

The number of visitor nights stayed in Central Coast in 2017-18 was 4.7 million. Total nights has seen an average annual increase of 1.3% since 2007-08. The largest volume of nights came from domestic overnight intrastate visitors (72.8%) followed by international visitors (14.9%), and domestic overnight interstate (12.3%) (TRA, 2018).

Average Length of Stay

International visitors had the longest length of stay, staying an average of 10.9 nights. Interstate domestic overnight visitors spent an average of 3.0 nights in Central Coast, followed by domestic overnight intrastate visitors at 2.7 nights (TRA, 2018).

Visitor Activity

Of the visitors to Central Coast, the activity that was most frequently undertaken by visitors was social activities (79.3% of visitors completed this activity) followed by outdoor/ nature activities (37.8%). The most popular social activity was eating out at a restaurant or café, followed by shopping and sightseeing. The most frequently undertaken outdoor/ nature activities were going to the beach, visiting a national or state park as well as bushwalking and visiting gardens. Approximately 16.5% of people that came to Central Coast and did an outdoor activity/ sport (TRA, 2018).

Purpose of Trip

The highest proportion of visitors to Central Coast visit for the purpose of a holiday (43.7%), followed by visiting friends and relatives (39.4%). Less than 10.0% of visitors go to Central Coast for business whilst 8.1% go for another reason (TRA, 2018).

Workforce

Tourism workers accounted for approximately 13.0% of workers in Central Coast in 2016. Of these workers 61.6% female and 38.4% male. Approximately 34.9% of workers worked full time hours whilst 59.9% of workers were working part time showing the significant issue in Central Coast of part time workers.

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APPENDIX B: COMPETITIVE ASSESSMENT

LOCATION QUOTIENTS

To demonstrate the specialisation of the economy, location quotients based on employment have been calculated. The location quotients demonstrate the degree to which a local or regional economy is specialised by examining the proportion of employment (by industry sub-sector) compared to a larger economy (Australian economy). Location quotients can be used to indicate strengths and weaknesses of a local or regional economy (i.e. identify its natural competitive advantage).

For this project, the analysis has compared the Central Coast LGA economy with that of the comparison regions of Geelong, Newcastle and Sunshine Coast. A location quotient of "1" means that Central Coast has an equal share of employment (compared to the Australia) for a specific industry sector, thus no potential advantage either way. A location quotient above "1" indicates a specialisation of labour and therefore an area of potential competitive advantage. If the location quotient is below "1", the area has a weakness in this particular industry sector.

An assessment of location quotients at the 1-Digit ANZSIC level suggests Central Coast has labour specialisations in the industries of:

- Health care and social assistance (LQ = 1.4)
- Accommodation and food services (LQ = 1.3)
- Retail trade (LQ = 1.3)
- Construction (LQ = 1.2)
- Other Services (LQ = 1.2)
- Rental, hiring and real estate services (LQ = 1.1)
- Manufacturing (LQ = 1.03)

Central Coast has the highest LQ in accommodation and food services and the second highest in retail trade. Central Coast also has a higher specialisation in manufacturing than Sunshine Coast (LQ = 0.8) and Newcastle (LQ = 0.9), however Geelong is higher with an LQ of 1.2. Newcastle has a higher specialisation than Central Coast in health care and social assistance at 1.5, however Sunshine Coast and Geelong both have an LQ of 1.3.



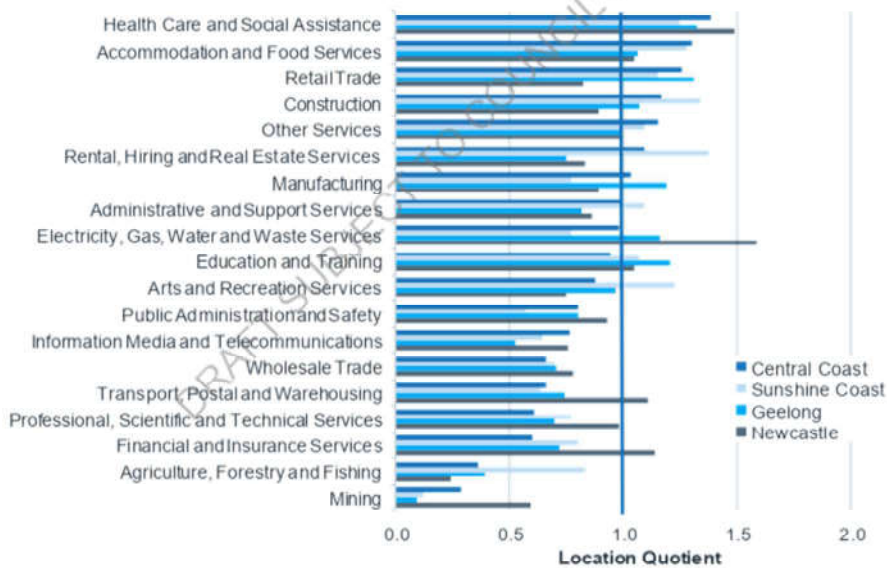
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Figure B.1. Location Quotients, 1 Digit ANZSIC, Central Coast



ABS (2017a).

Figure B.2. Location Quotients, 1 Digit ANZSIC, Central Coast v Comparison Regions



ABS (2017a).

As manufacturing has many 2-digit industries that can be vastly different, an analysis of these industries is undertaken. An assessment of location quotients at the 2-Digit ANZSIC level suggests Central Coast has labour specialisations in the manufacturing industries of:

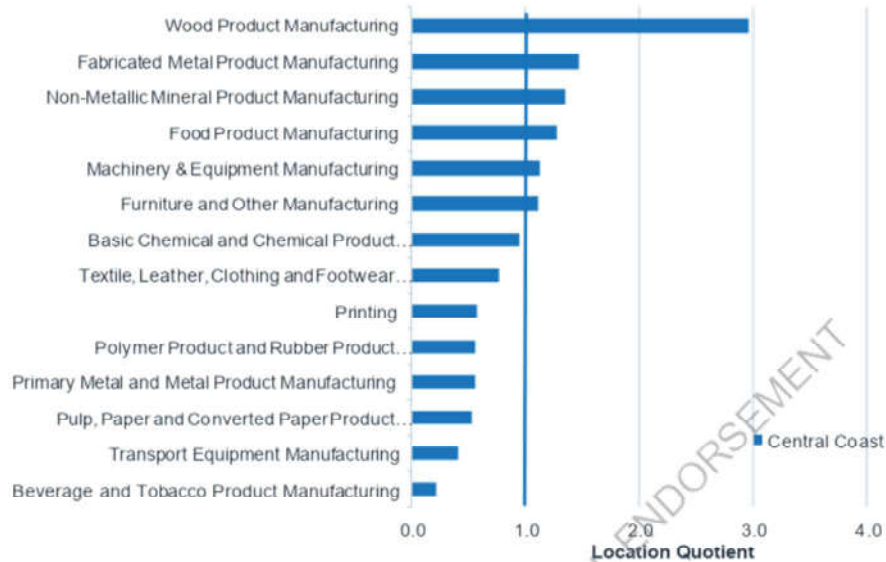
- Wood product manufacturing (LQ = 3.0)
- Fabricated metal product manufacturing (LQ = 1.5)
- Non-metallic mineral product manufacturing (LQ = 1.4).
- Food product manufacturing (LQ = 1.3)



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- Machinery and equipment manufacturing (LQ = 1.1)
- Furniture and other manufacturing (LQ = 1.1)

Figure B.3. Location Quotients, 2 Digit Manufacturing ANZSIC, Central Coast



ABS (2017a).

Table B.1. Location Quotients, 1 Digit ANZSIC (Ranked for Central Coast prevalence)

Sector	Central Coast	Sunshine Coast	Geelong	Newcastle
Health Care and Social Assistance	1.4	1.3	1.3	1.5
Accommodation and Food Services	1.3	1.3	1.1	1.0
Retail Trade	1.3	1.2	1.3	0.8
Construction	1.2	1.3	1.1	0.9
Other Services	1.2	1.1	1.0	1.0
Rental, Hiring and Real Estate Services	1.1	1.4	0.8	0.8
Manufacturing	1.0	0.8	1.2	0.9
Administrative and Support Services	1.0	1.1	0.8	0.9
Electricity, Gas, Water and Waste Services	1.0	0.8	1.2	1.6
Education and Training	0.9	1.1	1.2	1.1
Arts and Recreation Services	0.9	1.2	1.0	0.7
Public Administration and Safety	0.8	0.6	0.8	0.9
Information Media and Telecommunications	0.8	0.6	0.5	0.8
Wholesale Trade	0.7	0.7	0.7	0.8
Transport, Postal and Warehousing	0.7	0.6	0.7	1.1
Professional, Scientific and Technical Services	0.6	0.8	0.7	1.0
Financial and Insurance Services	0.6	0.8	0.7	1.1
Agriculture, Forestry and Fishing	0.4	0.8	0.4	0.2
Mining	0.3	0.1	0.1	0.6

ABS (2017a).



CLUSTER MAPPING

Cluster mapping builds on the location quotient analysis by portraying the regional location quotients against NSW industry estimated employment growth over time (from 2015-16 to 2025-2026). By incorporating industry growth, cluster mapping allows for the identification of growth opportunities in specific industry sectors, where a natural competitive advantage already exists against a backdrop of an expanding/ growing sector State-wide.

Industry clusters located above the “1” on the vertical axis indicate an existing industry concentration (strength or competitive advantage, as discussed previously) within the region being examined. The NSW industry average annual employment growth estimate for 2015-16 to 2025-26 (AEC, unpublished b) is plotted along the horizontal axis, with 0% average annual growth over the period creating a midline. The further to the right of this central horizontal axis, the faster the industry is expected to expand. Similarly, the farther to the left of the zero percent midline, the faster it is expected to shed jobs during this period. The size of the cluster (circle) in the map demonstrates the size of the local workforce in that industry sector locally.

Industries which are located in the Well-Represented/High Growth section of the cluster map are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience strong (above average) average annual employment growth in New South Wales. These sectors should be pursued for economic development activities, as they are likely to experience significant growth in coming years. The industries located in this section for Central Coast are:

- Health Care and Social Assistance (LQ = 1.4, Growth Expectation = 1.8%)
- Retail Trade (LQ = 1.3, Growth Expectation = 1.6%)
- Accommodation and Food Services (LQ = 1.3, Growth Expectation = 1.5%)
- Construction (LQ = 1.2, Growth Expectation = 1.4%)
- Rental, Hiring and Real Estate Services (LQ = 1.1, Growth Expectation = 1.5%)

Industries which are located in the Under-Represented/High Growth section of the cluster map are industries which don't benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience strong (above average) average annual employment growth in New South Wales between 2016 and 2026. These sectors should be investigated further, where appropriate, to determine their potential to be targeted for economic development activities as they are may perform well in the coming years if local supply chains and support are available. Industries located in this section for Central Coast are:

- Education and Training (LQ = 0.9, Growth Expectation = 1.6%)
- Administrative and Support Services (LQ = 1.0, Growth Expectation = 1.5%)
- Electricity, Gas, Water and Waste Services (LQ = 1.0, Growth Expectation = 1.4%)
- Public Administration and Safety (LQ = 0.8, Growth Expectation = 1.5%)
- Arts and Recreation Services (LQ = 0.9, Growth Expectation = 1.4%)
- Professional, Scientific and Technical Services (LQ = 0.6, Growth Expectation = 1.6%)
- Transport, Postal and Warehousing (LQ = 0.7, Growth Expectation = 1.4%)
- Financial and Insurance Services (LQ = 0.6, Growth Expectation = 1.5%)

Industries which are located in the Well-Represented/Moderate Growth section of the cluster map are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience positive, but below average, average annual employment growth in New South Wales. These sectors could be considered for economic development activities, particularly if they are interconnected with strong-growth sectors of the economy. Industries located in this section for Central Coast are:

- Other Services (LQ = 1.2, Growth Expectation = 1.3%)
- Manufacturing (LQ = 1.0, Growth Expectation = 0.4%)



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Industries which are located in the Under-Represented/Moderate Growth section of the cluster map are industries which do not currently benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience positive, but below-average, average annual employment growth in New South Wales between 2016 and 2026. These sectors could be investigated further, where appropriate, to determine their potential to be targeted for economic development activities. Industries located in this section for Central Coast are:

- Information Media and Telecommunications (LQ = 0.8, Growth Expectation = 1.1%)
- Wholesale Trade (LQ = 0.7, Growth Expectation = 0.9%)
- Mining (LQ = 0.3, Growth Expectation = 1.1%)
- Agriculture, Forestry and Fishing (LQ = 0.4, Growth Expectation = 0.7%).

Manufacturing has been split into 2 and 3 digit industries to determine potential opportunities in Central Coast. The Australian growth rates for these industries has been assumed to be representative of the growths in Central Coast with location quotients still being respective to Australia (IBISworld 2018).

Key industries that should be explored include:

- Food Product Manufacturing (LQ = 1.3, Growth Expectation = 0.2%)
- Beverage Manufacturing (LQ=0.2, Growth Expectation = 3.4%).
- Non-Metallic Mineral Product Manufacturing (LQ = 1.4, Growth Expectation = 1.3%).

These three manufacturing industries all have positive growth expectations, whilst food product manufacturing and non-metallic mineral product manufacturing are also well represented industries. Beverage manufacturing is a potential opportunity for Central Coast with a significant growth expectation but does not have labour specialisation. It should be investigated further, where appropriate, to determine their potential to be targeted for economic development activities.

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Figure B.4. Cluster Map, 1 Digit ANZSIC, Central Coast

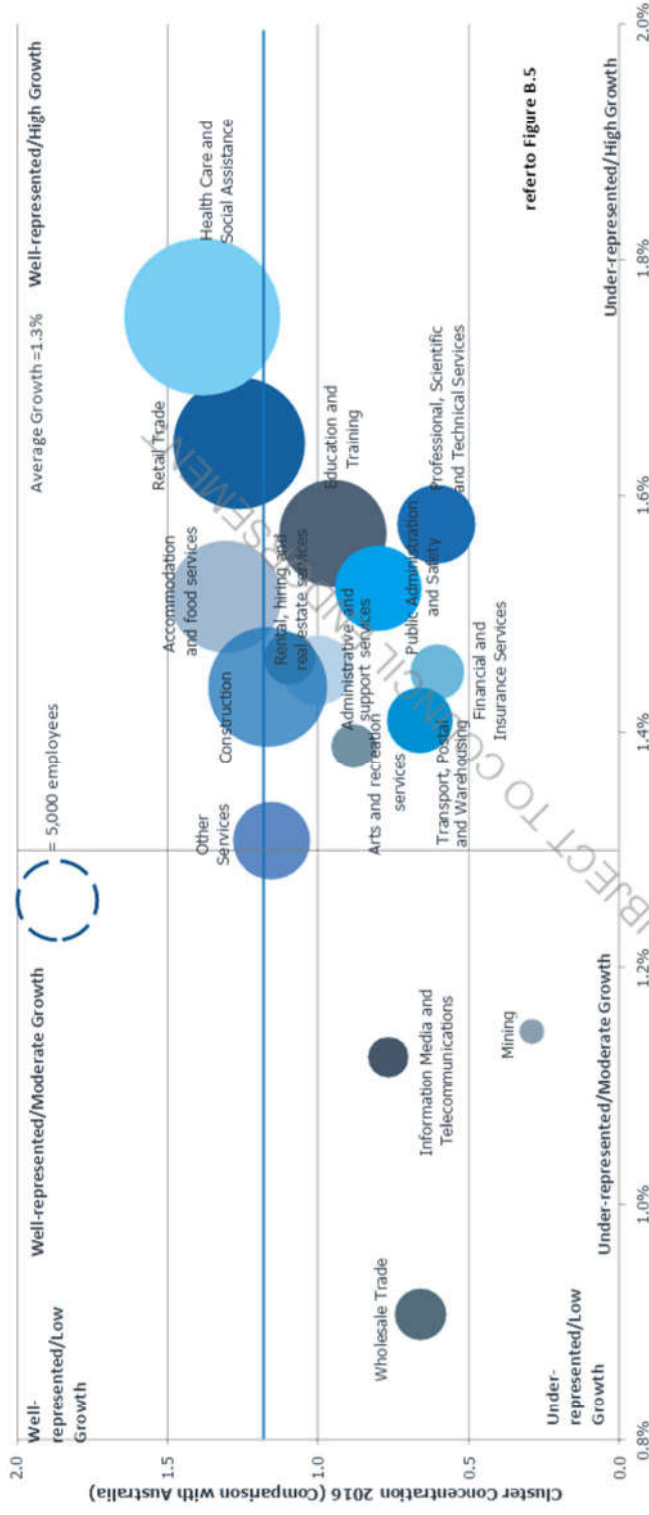


ABS (2017a), AEC (unpublished a).



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Figure B.5. Cluster Map, 1 Digit ANZSIC, Central Coast (Amended Scale)



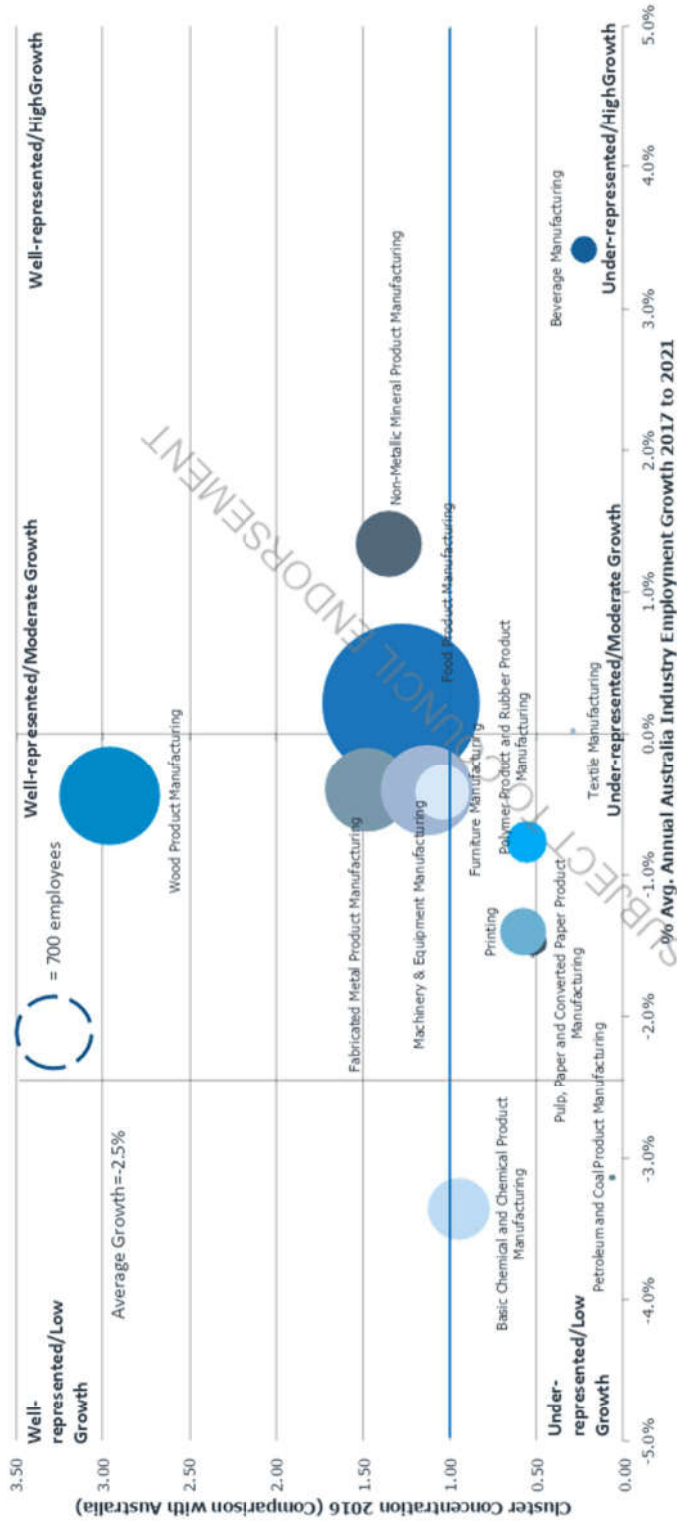
Note: The horizontal axis has been amended to include only a snapshot from 0 to 2.0 and 0.8% to 2%, respectively, to better identify the industries in this section.

ABS (2017a), AEC (unpublished a)



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Figure. B.6. Cluster Map, Manufacturing Industries, Central Coast



ABS (2017a), AEC (unpublished a), IBIS world (2018)

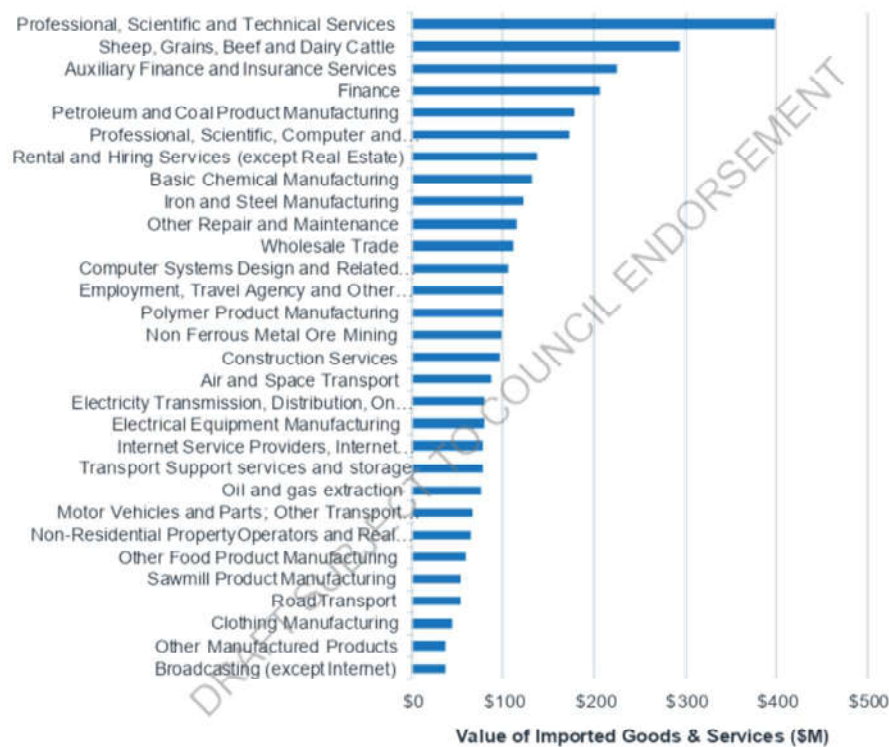


IMPORT/ EXPORT ANALYSIS

Prominent imports into a region can represent opportunities, where skills and labour can be easily sourced. This could improve local industry supply chains and provide additional job opportunities for locals.

In 2014-15, an estimated \$4,235.9 million worth of imports came into Central Coast LGA. The key import Central Coast was professional, scientific and technical services importing nearly \$400 million. sheep, grains, beef and dairy cattle was the second largest import, followed by auxiliary finance and insurance services and finance. Sheep, grains, beef and dairy cattle imports comprised over half (55%) of all imports into the food and beverage manufacturing sector. This is a key import into the meat and meat product manufacturing sub-sector.

Figure B.7. Imported Goods and Services, 2014-15



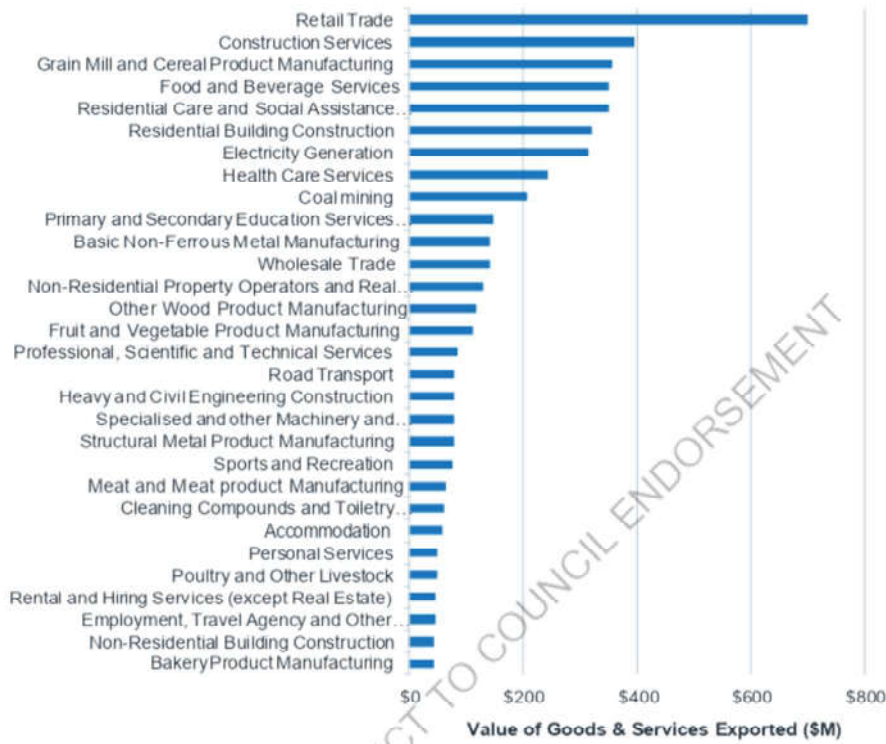
ABS (2017a), ABS (2017b).



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In 2014-15, an estimated \$5,979.2 million worth of exports left from Central Coast. Key exports from Central Coast are retail trade, construction services and grain mill and cereal product manufacturing, aligning with key employment sectors in the region.

Figure B.8. Exported Goods and Services, 2014-15



ABS (2017a), ABS (2017b).

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APPENDIX C: COMPARATIVE ASSESSMENT

For the comparative assessment, key indicators for Central Coast were compared to the regions of Greater Geelong, Newcastle and Sunshine Coast.

POPULATION

Central Coast experienced low population growth from 2007 to 2017, with an age growth rate of 1.0%. This is the second lowest of the comparison regions, with Newcastle having the lowest population growth of 0.9%. Average population growth has been slowing in the recent 10 years. The projected growth from 2017 to 2031 in the Central Coast is projected to be the lowest of all the comparison regions, maintaining its current 10-year average annual growth of 1.0%. A slow population growth will have significant effects on the largest three employing industries in Central Coast being health care and social assistance, retail trade and construction.

Table C.1. Population Growth

Region	5 Year Average Annual Growth	10 Year Average Annual Growth	Average Annual Growth (2017-2031)
Central Coast	0.8%	1.0%	1.0%
Geelong	2.3%	1.9%	1.6%
Newcastle	0.7%	0.9%	1.1%
Sunshine Coast	2.5%	2.5%	2.1%

Source: ABS (2018a).

GROSS REGIONAL PRODUCT

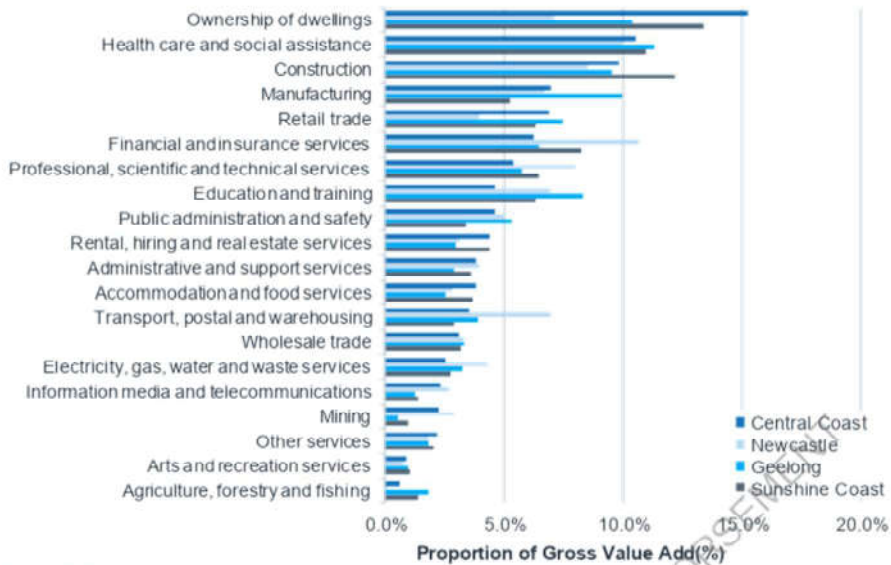
Central Coast recorded positive economic growth between 2006-07 and 2016-17. The strongest growth was between 2014-15 and 2015-16, growing by 4.7%. Gross Regional Product growth between 2015-16 and 2016-17 was 2.6%, the second highest of the comparison regions, with only Geelong higher at 3.8%. Central Coast had an average annual growth rate over the last 10 years of 2.1%. This is the second lowest of the comparison regions, with Newcastle being the only region with a lower average annual growth at 1.4%. Geelong grew its economy by 2.3% per annum whilst Sunshine Coast grew by 3.3% annually.

Ownership of dwellings was the largest contributor to gross value add (GVA) in 2016-17 in the Central Coast, accounting for 15.2% of GVA. Health care and social assistance (10.5%) was the second largest contributor to GVA, followed by construction (9.8%), manufacturing (7.0%) and retail trade (6.9%).



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Figure C.1. Proportion of Gross Value Add (ranked by Central Coast)

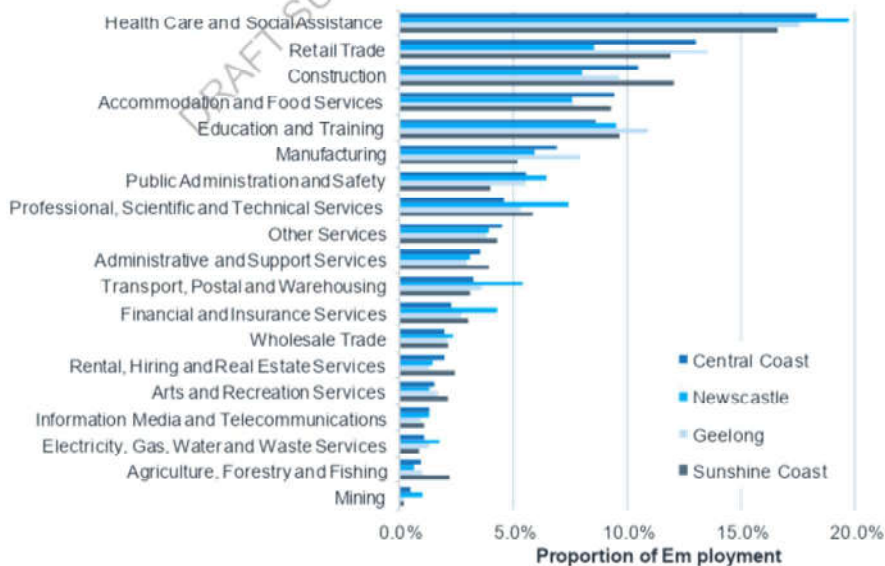


Source: AEC (unpublished).

EMPLOYMENT BY INDUSTRY

In 2016, health care and social assistance was the largest employing industry in the Central Coast (by place of work), accounting for 18.3% of jobs. Retail trade followed (13.0%) as well as construction (10.5%) and accommodation and food services (9.5%). As these are population reliant industries, slowing population growth will have a significant impact on employment and the economy. Newcastle had the highest proportion of employment in health care and social assistance at 19.8%, whilst Geelong and Sunshine Coast had 17.6% and 16.6%, respectively. Central Coast had the second highest proportion of workers in the construction sector of the comparison regions but had the highest proportion in accommodation and food services.

Figure C.2. Employment by Industry, 2016, PoW



Source: ABS (2017).



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EDUCATION

In 2016, more than half the population aged over 15 years in Central Coast did not have a post school qualification, higher than the comparison regions. The most prominent qualification type was certificate level at 24.3%, aligning with the industry structure of employment with manufacturing and construction being major employers. Central Coast had a lower proportion of people with a postgraduate degree, bachelor degree and graduate level diplomas/certificates than the comparison regions. This highlights a lack of higher education which is an area that can be improved through schools partnering with the University of Newcastle or a campus in Gosford.

Table C.2. Non School Education, 2016

Qualification	Central Coast	Newcastle	Greater Geelong	Sunshine Coast
Postgraduate Degree Level	2.4%	4.9%	3.2%	2.6%
Graduate Diploma and Graduate Certificate Level	1.3%	1.9%	2.3%	1.9%
Bachelor Degree Level	10.2%	16.0%	13.1%	12.0%
Advanced Diploma and Diploma Level	9.2%	8.5%	9.5%	9.9%
Certificate Level	24.3%	20.0%	20.8%	23.3%
No Qualification	52.5%	48.6%	51.2%	50.2%
Total	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017).

A larger proportion of the Central Coast population aged over 15 years had not completed school than those that had, with only 44.0% completing high school. This is much lower than the comparison regions, with all comparison regions achieving a completion rate above 50%.

Table C.3. Highest School Year, 2016

	Central Coast	Newcastle	Greater Geelong	Sunshine Coast
Completed Year 12	44.0%	54.5%	50.8%	52.6%
Did not Complete year 12	56.0%	45.5%	49.2%	47.4%
Total	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017).

YOUTH UNEMPLOYMENT

In 2016 youth unemployment (those aged between 15 and 24 years) in Central Coast was 14.6%, the second lowest of the comparison regions. Newcastle had the highest rate at 15.6% followed by Sunshine Coast at 15.3%. Geelong had the lowest rate at 13.5%.

Table C.5. Youth Unemployment, 2016.

Indicator	Central Coast	Newcastle	Greater Geelong	Sunshine Coast
Youth Unemployment	14.6%	15.9%	13.5%	15.3%

Source: ABS (2017).

JOURNEY TO WORK

Based on 2016 Census data, 100,153 residents living in Central Coast also work there, primarily in the sectors of retail trade, health care and social assistance, retail trade and construction. The self-sufficiency rate for the region is around 91.1%, meaning 91.1% of local jobs are being filled by local residents. This suggests that local residents are appropriately skilled and qualified for the current jobs structure in the region. The self-containment rate for the region is around 71.7%, meaning 71.7% of employed residents work locally. This is the highest of all the comparison regions.

The other 39,532 employed Central Coast residents travel outside Central Coast to work. These are primarily in the sectors of construction, health care and social assistance and public administration and safety. There is an



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opportunity for local industry growth in these sectors given the region has the skills locally but not necessarily the jobs.

Table C.6. Employment Self-Sufficiency and Self Containment

Region	Self-Sufficiency	Self Containment
Central Coast	91.1%	71.7%
Newcastle	49.3%	68.3%
Greater Geelong	83.0%	79.7%
Sunshine Coast	90.7%	81.9%

Source: ABS (2017)

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CONSULTATION
SUMMARY

MARCH 2020





CONSULTATION SUMMARY

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CONSULTATION SUMMARY

1. INTRODUCTION

1.1 BACKGROUND

A core component of the Central Coast Economic Development Strategy is the compilation of feedback received from key stakeholders, both internal and external – this may include representative and leaders from within business and industry, property and construction, community groups and other levels of government – all of which have a stake and interest in the current circumstance and future economic trajectory of the region and what factors may shape the desired future economy.

Typically, the feedback sought relates to opinions, impressions and suggestions that include the core strengths, limiting challenges and future opportunities to be embraced in developing a focussed Economic Development Strategy for the Central Coast.

1.2 PURPOSE OF THIS REPORT

The consultation summary provides a source of stakeholder commentary and input into components of the strategy seeking to understand the region's current economic barometer from an introspective viewpoint. It provides a platform to capture both differing and aligned sets of opinions and adds value to the process of developing the Economic Development Strategy to ensure that challenges are met, opportunities are realised, and strengths are leveraged.

1.3 APPROACH

Consultations were undertaken as part of the Central Coast Economic Development Strategy, including focus group workshops, face-to-face meetings, phone meetings, and surveys. The primary consultation period was 31 January through 29 March 2019, with an intensive period of local engagement and focus group workshops during the week commencing March 18-21 2018, with follow up calls made to unavailable key stakeholders following this.

Additional consultation occurred during the period between October 2019 – February 2020 after the first draft of the EDS. Council staff distributed this document via Executive Leadership Team and Councilor Briefings, emails to key stakeholders within the greater region including Council Staff, businesses, Local Aboriginal Land Council, State and Federal Governments for review and comment. Feedback has been encapsulated in the draft Economic Development Strategy.

A full list of focus group workshop attendees, individual meetings and subsequent telephone meetings is attached in the Appendices at end of this report.



CONSULTATION SUMMARY

2. SUMMARY

This section presents a summary of the key implications identified for the development of the Central Coast Economic Development Strategy through the consultation sessions. This document does not present or represent the Economic Development Strategy, but reflects what learnings came from the consultation to inform the Economic Development Strategy.

2.1 STRENGTHS

The following key strengths were identified as being relevant for consideration in the development of the Economic Development Strategy:

- **Gosford CBD Developments:** There are hundreds of millions of dollars committed to current and future development projects within the Gosford CBD area. This type of investment impact cannot be understated and aside from the direct capital injections and jobs provided during construction phase, the longer-term benefits of occupation and activation will reap rewards in the years to come for the regional economy and act as a beacon to attract additional investment and support required infrastructure.
- **University of Newcastle (UON):** the Ourimbah campus, mid-way between the centres of Gosford and Wyong is a critical part of the future fabric for the Central Coast, providing further education and pathways to employment for youth, as well as opportunities for continued learning and up-skilling of current workforce which will help to meet the challenges of future demands. The University has a strong commitment to the region and works closely with the two of the region's key employers (amongst others), being the food manufacturing industry (including research) and the Gosford Health Authority. The Gosford Hospital redevelopment will be augmented through the collaboration and inclusion of the UON Medical School.
- **Food Manufacturing:** There are internationally branded food manufacturing businesses that produce on the Central Coast - these include McCain Foods, Sara Lee, Mars, Sanitarium and George Weston Foods. Clustering of businesses such as these sends a clear message to the industry that the Central Coast region has the required support networks (university research, collegiate businesses) and attributes to support one of the most dynamic industries within the manufacturing sector.
- **Skilled/ Available Workforce:** Central Coast has a significant and skilled workforce of local residents. A significant amount of these resident workers leave the region each day to work elsewhere showing that there are skilled residents that are forced to leave the region as the jobs aren't available in Central Coast. If jobs became available in Central Coast, there would already be sufficient resident workforce to supply the majority of opportunities.

2.2 CHALLENGES

The following challenges were identified as being the key issues to be considered and overcome to ensure a prosperous region moving forward:

- **Availability of Serviced Industrial Land:** Despite a large amount of current and future (20-40ha) zoned industrial land, very little is currently unconstrained or serviced appropriately. Anecdotally, there are recent examples of businesses seeking to relocate to the region, however, they have been constrained having not successfully found readily available and appropriate land parcels for near term development. This is a clear inhibitor to the creation of local employment opportunities into the future.
- **Public Transport:** Whilst the Central Coast is well connected via rail & major roads to Sydney and Newcastle, intra-regional transport is difficult, with only a north-south spine providing services. Traversing the region is not an easy prospect, certainly made more difficult due to the natural structure and waterways, which provide challenges. A lack of public transport option is cited as being partly attributable to youth unemployment due to difficulties in getting to/from potential work locations, even though employers in these regions cite skilled labour shortages as being a key issue. The issue affects large sections of the community and also impacts on potential tourism growth – particularly for those who may arrive via train from Sydney. This is a challenge that once addressed could have significant benefits to the community.



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- **Accommodation Options:** The Central Coast lacks diversity and higher quality accommodation offerings, with limited scope for business travellers, particularly in close proximity to the Gosford and Wyong centres. Higher amenity accommodation is mainly restricted to the immediate coastal areas.
- **Clarity Around Regional Objectives:** Whilst there is positive activity occurring, the multiple stakeholders across levels of community and government (all levels) do not appear to have clearly articulated and focussed whole of region goals and objectives – or at least they are not obvious across the stakeholder groups. There would appear to be a strong case for coordinated regional action and leadership to crystallise the agreed, prioritised objectives.
- **Brain Drain to Sydney of Professional Workers:** Almost one third of workers leave the Central Coast to work in Sydney with a significant proportion of these being in the professional services industry. One of Central Coasts major imports is, in fact, professional services – therefore future plans to attract investment and jobs in this sector is a clear opportunity to take advantage of the resident workforce, increase local economic output and reduce regional imports.
- **Intra & Inter-Regional Awareness:** There are some very positive aspects of the Central Coast economy that are currently underplayed. There is a general lack of awareness of the current strengths and potential future opportunities – particularly for business and industry, that are important selling points for the region, which, if matched with the opportunities offered by the region's lifestyle, begin to form some compelling arguments for inward investment and population (particular worker) attraction.
- **Skills Shortages:** In addressing unemployment at both a general and youth level, there are examples of skills shortages in some areas that offer an opportunity for address and also indicate skilling pathways and future tertiary education and employment opportunities for school leavers. There is a strong case for skills gap analysis work to be undertaken to ensure that as many local opportunities are being filled and future-catered for through awareness of requirements.
- **Key Employer Connectivity:** The Central Coast is home to some strong national and multinational businesses in both the food and non-food manufacturing sectors (amongst others), however, there is currently a lack of engagement between Council and the regions strong employers. Linkages between Council, employers, educators and other related levels of government are critical to ensure key employers are supported and connected to the community, in addition to having a conduit through which to communicate effectively regarding issues and opportunities.

2.3 MUST HAVES

The following represent those factors that came through strongly in the consultation and engagement sessions as the 'must have' elements of the future Central Coast economy and local area:

- **Local Lifestyle and Health:**
 - Creating a lifestyle location in Central Coast is essential for creating a place for all residents but also attracting people to the region.
 - An attractive lifestyle for the older population (over 50s) is important for Central Coast, which will accompany the local health precincts development in Gosford.
 - Once an attractive lifestyle for residents has been developed, this can then be leveraged for tourism development.
- **Protection of the Natural Environment:** Whilst the natural assets the Central Coast has to offer are to be leveraged to increase tourism and lifestyle for residents, it is necessary that where possible, protect the environment and make sure that these assets are sustainably managed. Constraints mapping is required to identify those areas that must be protected and those areas where development is justified and should be supported.



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- **Leadership and Communication:**
 - There are multiple organisations in Central Coast working to grow the economy and employment opportunities however many don't know what other departments are doing. Leadership and a central driver such as the coordinator general to have everyone working together is necessary for the region's economic development.
 - Communication between Council, Government Departments and business and industry is key in maintaining the current businesses in the region as well as drawing more businesses to the area.
 - Communicating to businesses outside of the Central Coast that it is open for business and that there is opportunities and support to locate in Central Coast.
- **Available Serviced Industrial Land to Support Business and Employment Growth:** There is a large amount of zoned industrial land, however very little of it is serviced appropriately and therefore businesses that want to move to the region cannot find the appropriate land causing these businesses to relocate elsewhere.
- **Lifestyle and Recreation Precinct:**
 - Central Coast is in need of an entertainment precinct, to increase visitation and liveability of its residents. The identified location from consultations is close to the Central Coast Stadium so that major events can continue in the precinct whilst also being close to the Gosford Foreshore.
 - An entertainment precinct will likely help to retain youths in the region especially on weekends with many travelling to Sydney for nightlife.
 - This will also improve the liveability and lifestyle offering of the region, giving residents and people from outside of Central Coast a reason to come for a holiday. With more attractions and offerings identified as a key to increasing tourism.
- **Local Transport and Access:** Local transportation is a must have for the Central Coast, as improving connections to all areas will produce benefits to youth unemployment, tourism and liveability for current residents.

2.4 KEY OPPORTUNITIES

During both the workshops and individual meetings with key stakeholders, key opportunities available to the Central Coast economy to take advantage of to leverage growth, jobs and prosperity into the future include:

- **University and Medical Precinct in Gosford:**
 - Combining with the University of Newcastle, the medical precinct in Gosford has the opportunity to transform the CBD. This will create significantly more people in Gosford, provide additional employment opportunities as well as having flow on effects to surrounding businesses. By having a precinct of this scale so close to Sydney, it has the potential to attract people to the region to have their medical needs taken care of.
 - The health and technology research facility expansion partnered with University of Newcastle will bring doctors to Central Coast who are also likely to bring partners/ spouses who will also bring their skills to the region in the field that they work in.
 - University of Newcastle has invested in hospital education, with health analytics being a major component of the University's research.
- **Culture and Events:** Using the current Central Coast Stadium, an event park could activate the region with more bars and nightlife, keeping people in Central Coast longer and indeed overnight (if appropriate accommodation is available). This could give the opportunity for the stadium to be utilised to a higher extent.
- **Gosford Waterfront (foreshore) Precinct:** Gosford has a natural asset of the Waterfront region, which is currently being underutilised. Creating a foreshore precinct will activate the town centre, along with the current leagues club redevelopment, would allow for a revitalised area for people to come to.



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- **Logistics Hub (Warnervale):** Warnervale has been identified as a key potential site for a future logistics hub, due to its location with the Pacific Motorway giving logistics companies fast access to Sydney, Newcastle and associated ports.
- **Tourism and Events:** Central Coast could market themselves as a lifestyle, recreation and food destination, by hosting events that outline the agricultural and food products that Central Coast produces. By advertising the strong industries that Central Coast has it will create a greater outside perspective of the region. Current utilisation of the Council owned stadium could be optimised to attract more events/ festivals/ attractions.
- **Airport:** Consultation highlighted much debate (both current and historical) around development at the existing Warnervale Airport site. Whilst no determination can be made regarding expansion of capability, the proximity to the zoned employment lands, also identified as a potential logistics hub location, does offer some future opportunities to develop interest and investment in allied logistical and aviation/ aeronautic technologies. The area could offer potential for a high-tech precinct.

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CONSULTATION SUMMARY

APPENDIX A: WORKSHOP 1 – EXECUTIVE LEADERSHIP TEAM

Table A.1. Executive Leadership Teams Role in Economic Development

Area	Focus Area	How they can Support Economic Development
Chief Executive Officer	<ul style="list-style-type: none"> Council/ Regional Leadership 	<ul style="list-style-type: none"> Leverage external offers to drive economic development strategy
Governance	<ul style="list-style-type: none"> Business Enterprise Procurement and projects Governance and business services Economic development and project delivery 	<ul style="list-style-type: none"> Effective project governance & delivery
People and Culture	<ul style="list-style-type: none"> People planning and operations Business partnering and employment relations 	<ul style="list-style-type: none"> Employment strategy Local procurement <ul style="list-style-type: none"> Weightings Content Major projects: local capability to leverage applicable
Connected Communities	<ul style="list-style-type: none"> Community engagement Community partnerships Learning and education Leisure and lifestyle Libraries Facilities and asset management Leasing and asset management 	<ul style="list-style-type: none"> Tourism services Events: 60-100 people Smart work hubs.
Environment and Planning	<ul style="list-style-type: none"> Development assessment Environment and certification Strategic planning Natural and environmental assets Waterways and coastal protection Open space and recreation 	<ul style="list-style-type: none"> Efficient and pragmatic DA process Tourism: Sparkly, nature assets
Information Management and Technology	<ul style="list-style-type: none"> Digital information services Technology and customer service Office of the Chief Technology Officer Core Systems Consolidation Program 	<ul style="list-style-type: none"> Innovation in telecom infrastructure Enabling nature of the digital economy Smart Cities approach to the future CBDs
Roads Transport Drainage and Waste	<ul style="list-style-type: none"> Waste services and business development Roads business development and technical services Roads construction and project management Roads asset planning and design Roads maintenance and asset evaluation 	<ul style="list-style-type: none"> Supportive, enabling infrastructure



CONSULTATION SUMMARY

Area	Focus Area	How they can Support Economic Development
<p>Water and Sewer</p>	<ul style="list-style-type: none"> • Water technical services • Water construction and project management • Water planning and development • Water assets and facilities management 	<ul style="list-style-type: none"> • Products and opportunities for other sectors to leverage • Food digester/ waste to energy
<p>Innovation and Futures</p>	<ul style="list-style-type: none"> • Corporate strategy and performance 	<ul style="list-style-type: none"> • Land Use and spatial framework • Mapping of the stakeholders • Lots of zoned industrial land <ul style="list-style-type: none"> ○ 12 years of serviced ○ 16 per year consensus

DRAFT SUBJECT TO COUNCIL ENDORSEMENT



CONSULTATION SUMMARY

APPENDIX B: WORKSHOP 2 – CENTRAL COAST COUNCILLORS

The Central Coast Council Elected Members workshop on 18th March 2019 enabled discussion to identify the opportunities and challenges that Central Coast's economy faces currently and in the future.

CHALLENGES:

Challenges identified by Councillors include:

- **Direction and communication between all levels of Government:** State and Federal Governments are to be given guidance on where Central Coast needs to go by Local Government.
- **Infrastructure:** This relates to the required/ desired infrastructure needs/ wants of the community that both assist and encourage people to stay in the region. It includes parks, playgrounds and specifically public transport networks.
- **Youth Unemployment:** The region experiences high youth unemployment, due to a number of factors. These include a lack of public transport with youths that cannot drive being unable to get to work. Another reason for youth unemployment is the seasonal nature of the tourism industry with contract employment over the summer period before shutting down for most of the year.
- **Direction and planning:** Public transport and infrastructure need to be informed through proactive planning and responding to anticipated business and population needs.

STRENGTHS

- **Lifestyle:** Central Coast has a more affordable housing market than Sydney, great lifestyle with natural assets, and a variety of mid-tier firms. This could be a marketing strategy for the region.
- **Agricultural Produce:** There is high quality agricultural produce made on the Central Coast that is exported from the region. Key example provided – avocados that represent 20% of NSW production.

OPPORTUNITIES

- **Innovation Centres:** Allowing for entrepreneurs to have the space and ability to have their base in Central Coast, with suitable workplace accommodation and access to high-speed internet
- **University of Newcastle Medical Hub in Gosford:** The University of Newcastle is a growing presence in the region and, combined with the growth of the Gosford hospital precinct, could provide a pathway to employment.
- **Grey Nomads:** Creating RV friendly towns so that visitors can locate sites and spend an extra night within Central Coast (increasing tourism expenditure).
- **Disability Tourism:** Businesses creating opportunities for those with disabilities to travel and access local tourism products and experiences.
- **Warnervale Distribution Centre:** Warnervale was identified as a location for a logistics and distribution centre building local business synergies. Warnervale is located next to the Pacific Motorway and has manufacturing industries located in the suburb.



CONSULTATION SUMMARY

APPENDIX C: WORKSHOP 3 – GOSFORD FOCUS GROUP WORKSHOP

The Gosford Focus Group Workshop occurred on Tuesday 19th March 2019 at 10am. A list of attendees can be found in the table below.

Table C.1. List of Attendees

Organisation	Title
Central Coast News	Reporter
Mars Australia	Mars Food Australia Research and Development Director
Central Coast Industry Connect	Director
Business Centre	Senior Business Advisor
Department of Premier and Cabinet	Business Development Manager
Prestige Business Consulting	Managing Director
Department of Planning, Industry and Environment	Team Leader
Department of Planning, Industry and Environment	Senior Manager
Central Coast Community College	Regional Development Officer
	Independent candidate in the 2019 federal election in the seat of Robertson
Mingara Leisure Group	CEO
Hunta Property	Director
QQ	Director
New South Wales Chamber of Commerce	Regional Director
Department of Premier and Cabinet	Senior Officer
Central Coast Council	Mayor

Source: AEC

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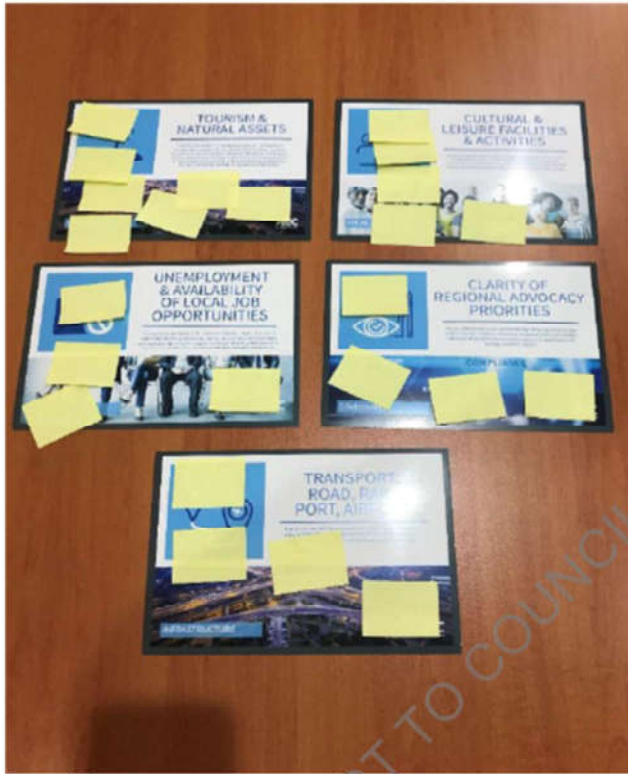


CONSULTATION SUMMARY

CHALLENGES

Workshop attendees were asked to identify their three most important challenges to the Central Coast economy. Pictures of the identified challenges are shown below:

Figure C.1. Key Challenges Identified in the Workshop



Source: AEC

Table C.2. Challenges and Number of Votes

Challenge	Votes
Tourism and Natural Assets	7
Cultural and Leisure Facilities and Activities	5
Unemployment and Availability of Local Job Opportunities	4
Clarity of Regional Advocacy Priorities	4
Transport, Road, Rail, Por, Airport	4
Environmental Sustainability	3
Education Attainment	2
Cross Government Collaboration	2
Housing Affordability	2
Availability of Appropriately Skilled Workforce	2
Skilling for the Future	2

Source: AEC.



CONSULTATION SUMMARY

Figure C.2. All Challenges Identified in the Workshop



Source: AEC

Within the challenges that were identified issues and potential responses were identified.

Tourism and Natural Assets

- **Reliance on Natural Assets**
 - Natural assets of the region are primarily beaches. There is an opportunity to develop more diverse and unique tourism attractions (man-made) and infrastructure to increase tourism reach.
 - There are few attractions to draw people to the region with the two main attractions being the Australian Reptile Park and Glenworth Valley Outdoor Adventures.
- **Limited Accommodation Options:** The availability and variety of accommodation options in the region is limited. There is an opportunity to enable development of multiple accommodation types in the region (especially close to city centres such as Gosford or Wyong) to improve the types of accommodation on offer in the region however, this will require a change in planning controls.
- **Events:** Currently the Central Coast Stadium is not being leveraged to best advantage Central Coast tourism, there is an opportunity to increase the number of events held within the region on an annual basis. Entertainment precincts located near the stadium are also needed to keep people in the region after or before events that are on at the stadium.
- **Indigenous Tourism:** The Indigenous culture and heritage history of Central Coast was identified as an opportunity for tourism in Central Coast.
- **Food Tourism:** Central Coast has a strong and rich food manufacturing industry which can be further leveraged to create a tourism hotspot.



CONSULTATION SUMMARY

- **Health and Wellness Region:** With an aging population specifically in Central Coast, the region could be leveraged as a health and wellness region not only for tourism opportunities but also for increasing population growth.
- **Weekend Activities (Retaining Youth):** There are very few activities for youths to do on the weekend, this causes them to have to travel to Sydney or Newcastle. A cultural or entertainment precinct in Central Coast could prevent youths spending their money elsewhere on the weekends rather than within the Local Government Area.

Cultural and Leisure Activities

- **Community Open Space:** Creating an area that the community can come to enjoy and provide a space for community and cultural events – perhaps with a potential of other 'ticketed' event opportunities.
- **Marketing Local Activities:** Many locals within the Central Coast do not know of the activities or events that are being hosted due to a lack of marketing and communication.
- **Lack of Activities/ Events:** Locals are leaving the region on weekends or during the week to Sydney or Newcastle as they are so easily accessible as well as hosting more and larger events. Central Coast needs to bring key events to the region or create events that people in the local community can enjoy. Millennials are a key group that leaves the region to go to events elsewhere (as noted above).

STRENGTHS

- **Skilled Workforce:** There are skilled workers in Central Coast however they are leaving to Sydney. Should jobs become available there is a sufficient workforce specifically in the professional services sector to fill these vacancies.
- **Proximity to Sydney and Newcastle:** Central Coast's proximity to the major population centres of Sydney and Newcastle is a major strength. Central Coast can offer a higher/ different lifestyle and affordable housing than Newcastle or Sydney which is a potentially marketing opportunity.

OPPORTUNITIES

- **Skill Gaps:** Despite the significant workforce which leaves the region to go to Sydney or Newcastle for work, there are still significant skill gaps that aren't being filled in industries such as manufacturing and engineering. There is an opportunity for the University of Newcastle campus in Ourimbah to fill these gaps with school students within Central Coast.
- **Innovation Centre:** A space in Central Coast (potentially North Wyong) where innovators can work, collaborate and learn in central coast so that they don't have to leave for Sydney or Newcastle for these opportunities.
- **Create a Burning Platform:** Creating a burning platform can give people in the region a message to get behind as well as improving the negative attitudes people have in the region internally.
- **Logistics Hub:** With the Northconnex and the M1 improving accessibility to Sydney from Central Coast as well as Newcastle within an hour's drive, there is an opportunity for a logistics hub in Warnervale.
- **Airport:** The Warnervale airport was identified as a potential catalyst for an aviation hub to bring aviation and related high value industries to the region. It is noted that this is a highly contentious issue.



CONSULTATION SUMMARY

APPENDIX D: WORKSHOP 4 – WYONG FOCUS GROUP WORKSHOP

The Wyong Focus Group Workshop occurred on Thursday 21st March 2019 at 10am. A list of attendees can be found in the table below.

Table D.1. List of Attendees

Organisation	Title
RDA Central Coast	CEO
Borgs Manufacturing	Planning and Development Manager
Australian Business	Business Facilitator, Central Coast and Newcastle, Entrepreneurs' Programme
LA Group	Managing Director
Department of Premier and Cabinet	Business Development Manager
Roads and Maritime Services NSW	Coordination Manager Central Coast & Lake Macquarie
TAFE	Leader, Campus Support
Accor	Director of Sales and Marketing
Department of Planning and Environment	Team Leader Hunter Central Coast Region
Central Coast Community College	Business Development Manager
Central Coast Council	Section Manager, Marketing and Tourism
Central Coast Council	Unit Manager, Community Partnerships
Central Coast Council	Community Engagement
-	Former Wyong Councillor and Deputy Mayor
University of Newcastle, RDA	Associate Professor
Central Coast Council	Deputy Mayor
Central Coast Council	Councillor
Central Coast Council	Councillor
Community Environment Network Inc.	Chairman
Central Coast Council	Mayor

Source: AEC



CONSULTATION SUMMARY

CHALLENGES

Workshop attendees were asked to identify their three most important challenges to the Central Coast economy. Pictures of the identified challenges are shown below:

Figure D.1. Key Challenges Identified by Wyong Workshop



Source: AEC

Table D.2. Challenges and Number of Votes

Challenge	Votes
Unemployment and Availability of Local Job Opportunities	12
Transport, Road, Rail, Por, Airport	12
Skilling for the Future	10
Tourism and Natural Assets	5
Resilience and Sustainability of the Local Economy	6
Cross Government Collaboration	4
Environmental Sustainability	3
Education Attainment	2
ICT and Digital Connectivity	2
Protection of Environmental Resources	2
Access to Funding	2
Digital Disruption and Technological Change	2

CONSULTATION SUMMARY

Figure D.2. All Challenges Identified by Wyong Workshop



Source: AEC

Within the challenges that were identified issues and strategies were identified.

Transport

- **Public Transport:** Public transport to the region is available and there are rail lines to Sydney and Newcastle. However, intra-regional travel via public transport is limited, impacting on both residents and tourists. This is a challenge that once addressed could have significant benefits to the community.
- **Road Infrastructure**
 - Road infrastructure is lagging making it more difficult for people to travel within the region. This is potentially due to political influences which have not effectively got funding for necessary roads.
 - There is currently no regional road plan that the collective region can get behind and push for funding.
- **Cycleway**
 - A cycleway could improve congestion of roads and another form of transportation (i.e. motorised scooters/bikes).
 - A cycleway could also lead to health and community benefits, further increasing the lifestyle offering of the Central Coast.
- **Demand Responsive Transport:** Demand Responsive Transport, or DRT is a flexible shared transport service that is designed to facilitate intra-regional travel when buses and trains aren't available. A trial is currently being undertaken to determine the effectiveness by a disability group.
- **Charge Points for Battery Powered Cars:** Having charge points for people with battery operated cars has the potential to increase tourism or increase the time that visitors may spend in the region whilst they wait for their cars to charge.



CONSULTATION SUMMARY

Unemployment

- **Cultural Issues**
 - Point raise that "a large proportion of people don't want to work and therefore jobs that people could be trained up in are having to be outsourced". Whilst this point was challenged, there was some agreement that inter-generational unemployment does have some impact.
 - Lack of 'aspiration' combined with perceived lack of opportunity was considered a factor in the youth sector. It is worth noting that public transport difficulties were also highlighted as a consideration in accessing work.
- **Higher Skilled Job Opportunities**
 - There are limited opportunities for work in professional services in Central Coast, partly because of the lack of office space and infrastructure. Skilled workers are leaving the Central Coast in search of work. Zoning could be changed in the CBD districts to allow for higher level buildings which would allow for more businesses to move operations there.
 - It is difficult for businesses to find a location that is accessible and near either the M1 or public transport
- **Lack of Serviced Industrial Land:** There is a substantial amount of zoned industrial land, but the land is not serviced (no trunk infrastructure) and therefore no businesses are able to move/ begin operations in the approved land. Another issue with the land available is that it is packaged too small, so a business with a large-scale warehouse cannot move to the land. Warnervale is a region that has been identified as a precinct opportunity.

SKILLING FOR THE FUTURE

- **Automation**
 - Automation in industries that are large employers in Central Coast such as manufacturing could pose a risk to the employment of people in these industries. Whilst it poses a risk there is also an opportunity for people to learn more skills to use the automated equipment.
- **Industry Direction**
 - Strategies to encourage growth and skills development to meet the needs of desired economic industries is required.
- **Engaging Youths**
 - Students in primary and secondary school need to be more actively communicated to regarding future employment pathways and local opportunities to help guide required learning and training.
 - It is important to retain the youth of the region who are innovators and give them opportunities to expand their business.

STRENGTHS

- **Proximity to Newcastle and Sydney:** The close proximity of Central Coast to Newcastle and Sydney is a strength that the region can use to its advantage, with the growth of Sydney and high property prices causing people and businesses to expand further out of the region.

OPPORTUNITIES

- **Food and Logistics:** The region can leverage its food manufacturing industries with the help of a logistics industry/ hub, to transport the food manufactured here to other regions. The synergies created by the two industries should be to the benefit of both industries.
- **Communication:** Communication to businesses that Central Coast is open for business and is ready for businesses to invest in the region.



CONSULTATION SUMMARY

APPENDIX E: INDIVIDUAL INTERVIEWS

During the consultation period, AEC met with stakeholders individually to discuss the issues that they face. A list of people who were interviewed individually or in a small group is below.

Table E.1. Individual Interview Attendees

Organisation	Title
Department of Planning and Environment	Team Leader Central Coast
Department of Planning and Environment	Team Leader Central Coast
Hunter and Central Coast Development Corporation	CEO
Hunter and Central Coast Development Corporation	COO
Hunter and Central Coast Development Corporation	Senior Development Manager
University of Newcastle	Dean, Central Coast
University of Newcastle	
Regional Development Australia	CEO
Central Coast Industry Connect	Director
Central Coast Council	Mayor
Central Coast Council	CEO
NSW Department of Premier and Cabinet	Assistant Regional Coordinator, Central Coast
NSW Department of Premier and Cabinet	Business Development Manager
NSW Department of Premier and Cabinet	Business Development Manager
Destination Sydney Surrounds North	General Manager
Central Coast Local Health District	CEO
Central Coast Council	Deputy Mayor

Source: AEC.

Table E.2. Central Coast Council Connected Communities Interview Attendees

Organisation	Title
Central Coast Council	Director Connected Communities
Central Coast Council	Unit Manager, Community Partnerships
Central Coast Council	Unit Manager, Community Engagement
Central Coast Council	Team Leader, Community Planning and Funding

CHALLENGES

- **Currently Zoned Industrial Lands are Heavily Constrained:** Central Coast has a substantial amount of zoned industrial land but a very small amount of serviced and ready to develop land.
- **Insufficient Supporting Infrastructure in Gosford to Increase Tourism:** In Gosford there is little incentive for visitors to come to the area with very limited accommodation options as well as having few attractions to keep visitors entertained or to encourage them to return.
- **Communication Outside of Central Coast:** Marketing of Central Coast as being "open for business" is required to facilitate business investment. This strategy would provide potential business investors with direct contacts within Council to assist in relocating to the region.



CONSULTATION SUMMARY

STRENGTHS

- **Proximity to Sydney and Transportation Options out of the Region:** The rail line and M1 out of Central Coast give people an easy entry and exit to and from the Central Coast. This can be to Sydney or Newcastle where there are large markets and employment opportunities.
- **Food Manufacturers:** There are internationally branded food manufacturing businesses that produce on the Central Coast. These include McCain Foods, Sara Lee, Mars, Sanitarium and George Weston Foods and more.
- **Central Coast Marketing Spend:** Central Coast spends a significant amount of money (the most of the DSSN area) on marketing. However, this marketing is not targeted effectively. If this is targeted effectively it would be of major benefit to the area.
- **Health Trainee Program:** The local health district has a trainee program with TAFE and year 11 and 12 students for job opportunities. These include administration, corporate services and allied health assistance.

OPPORTUNITIES

- **Gosford City Centre:** A revitalisation of the Gosford city centre could increase the liveability and change the look of the city centre. With the leagues club upgrade along with the hospital and university campus in the city centre being vital to the redevelopment.
- **High Speed Rail:** A high speed rail system from Newcastle to Wollongong, which has been proposed, is likely to increase the number of people wanting to move to Central Coast with the travel time to Sydney being reduced significantly.
- **University of Newcastle in Gosford:** If the University of Newcastle were to have a multi-campus facility (in Gosford) offering unique courses, specifically related to the regions needs, this could have a significant employment benefit as well education for Central Coast youths. Having a campus in Gosford would make it more accessible than having to travel to Ourimbah.
- **Logistics Hub:** With the strength of being located between Sydney and Newcastle, there is potential for a logistics hub to be located in Central Coast (Warnervale). This would benefit the food manufacturing industries that could have fast transport to major markets and ports.
- **Central Coast Health Expansion:**
 - Following the Gosford Hospital redevelopment there is to be a further \$72.5 million expansion for a health and technology research facility, partnered with the University of Newcastle. This will increase jobs and opportunities for doctors to come to Central Coast, whilst also bringing partners who could potentially be working within the professional services industry.
 - A \$200 million redevelopment is set to go for tender, increasing the size and capacity of the hospital to facilitate procedures that were previously sent to Gosford.

There are already two private health providers in the region with future plans for an additional facility in Gosford.



APPENDIX F: CONSULTATION REPORT

The public online survey was conducted via the Your Voice Our Coast website. This survey closed 30 April 2019.

<https://www.yourvoiceourcoast.com/central-coast-economic-development-strategy>

On this page there is a PDF information flyer which explains a little more about the current stats for the Central Coast Region, why we are developing this strategy and what we are hoping to achieve. Below is a copy of the information flyer and screen shots of the questions that were asked.

DRAFT SUBJECT TO COUNCIL ENDORSEMENT



CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY SURVEY

HELP SHAPE OUR FUTURE



THE ECONOMIC DEVELOPMENT STRATEGY WILL BE A LONG-TERM VIEW TO 2040

The Central Coast Economic Development Strategy (EDS) will provide a strategic framework to guide Council's decision-making around sustainable economic development initiatives that assist in creating jobs and stimulating the Central Coast economy. It will include broad objectives and strategies that aim to strengthen the local economy through targeted investment, improved partnerships between the community, business, State and Federal Governments, and promotion of the local government area as a desirable place to do business. The draft strategy will be placed on public exhibition before being presented to council for adoption. Once adopted, the strategy will commence over the following 5 to 10 years.

Your valuable feedback will influence the focus of this strategy

WHERE ARE WE NOW?

340,000
Approximate population (2017)

\$13.5 Billion
GRP (year ended June 2018)

POP X AGE:

Age Proportion

Age	Proportion
0-24	30.8%
25-64	48.9%
65+	20.3%



139,685
WORKING LOCAL RESIDENTS (2016 census)

100,153
Jobs Central Coast

39,532
Live Central Coast and work elsewhere

44%
Residents completed high school

6%
Unemployment (2018)

14%
Bachelor's degree or higher

\$1,594 p/w
Average household income (2016)

\$425 p/w
Average rent

\$646,773
Average property price



KEY INDUSTRIES BY:



BY EMPLOYMENT:



TOURISM:



TYPE OF VISITOR:



PURPOSE OF VISIT:



WHAT IS BEING DEVELOPED?

An economic development vision to 2040

Where do we want to be in 2040?

HOW WILL WE GET THERE?

-  What are the competitive advantages that set the Central Coast region apart?
 -  What are the challenges holding the Central Coast region back that, if addressed, could be game changers for the region in terms of growth and regional development business and jobs growth?
 -  What are the core strategic assets that should be leveraged for business, industry, investment and jobs growth?
 -  What are the core opportunities to drive jobs growth and investment in the Central Coast area over the next
- 3 - 5 YEARS > 5 - 10 YEARS > LONGER TERM

Want to know more?

email: projectdevelop@centralcoast.nsw.gov.au

Online survey questions

Central Coast Council will be delivering an Economic Development Strategy that will provide a **Vision of the Coast** economy and future prosperity through to 2040.

Consultation is being undertaken with business and industry, other levels of government and key stakeholders. As part of the consultation process, we would also like to hear from the **Community**, to contribute to the Vision and assist in selecting the key themes that will drive our economy and our future – particularly over the next five years, as we work toward our goals for 2040.

It will take **less than five (5) minutes** to complete the questionnaire and your participation in this study is completely voluntary. There are no foreseeable risks associated with this project. However, if you feel uncomfortable answering any questions, you can withdraw from the survey at any point. It is very important for us to learn your opinions.

Thank you very much for your time and support. Please start with the survey now by clicking on the **NEXT** button below.

About the survey

- The survey should take around 5 minutes to complete and will be available until 6th of May.
- You are able to save your responses and finish the survey at a later time using the 'Save and continue later' button.
- Use the **Next** and **Back** buttons to move through the survey. Please **do not use** your browser's back button.
- This survey is conducted by AEC Group Pty Ltd on behalf of Central Coast Council. AEC is a research firm that works within the professional code of behaviour of the Australian Market and Social Research Society, which is the professional industry body for the market research industry. Read AEC Group's privacy policy for this survey [here](#).
- You may remain anonymous and your responses are kept confidential. Personal information that may be collected is managed according to the Privacy and Personal Information Protection Act 1998. Any names and contact details attached to survey responses are removed after approximately six months, to allow for processing of the data. During the six-month retention period, you are able to request access to or correction of your information.
- For technical issues with the survey please contact AEC Group on 07 3831 0577 and ask for Priya Naray.

Next

Online survey questions

Q1. What age group are you in from the following?

Please select a single response

- Under 18
- 18-24
- 25-34
- 35-49
- 50-59
- 60-69
- 70-84
- 85 years and over
- Prefer to not answer

Q1.2. What is your residential suburb?

Please choose from drop down list below.

-- Select --

- Prefer to not answer
- Other (please specify)

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Online survey questions

Q2. Please rank the following attributes from 1 (highest) to 5 (lowest) which best describe the **STRENGTHS** for the Central Coast:

Lifestyle & Liveability	-- Select --	▼
Regional Leadership and direction	-- Select --	▼
Proximity and ease of access to Sydney and Newcastle	-- Select --	▼
Natural environment – bushland, waterways	-- Select --	▼
Investment and development activity within Gosford CBD	-- Select --	▼

- Don't know/unsure
- Prefer to not answer
- Other (please specify)

Q3. Please rank the following attributes from 1 (highest) to 5 (lowest) which best describe the **OPPORTUNITIES** for the Central Coast:

Major Education Facilities – providing learning and skilling for the future	-- Select --	▼
Encouraging businesses to expand or relocate from Sydney, or other markets	-- Select --	▼
Availability of land for expansion and growth	-- Select --	▼
Growth in Tourism and Events	-- Select --	▼
Taking advantage of good highway connections – production and distribution of goods	-- Select --	▼

- Don't know/unsure
- Prefer to not answer
- Other (please specify)

Online survey questions

Q4. Please rank the following attributes from 1 (highest) to 5 (lowest) which best describe the current CHALLENGES for the Central Coast:

Opportunities for Youth	-- Select --	▼
Lack of leisure and entertainment facilities/ activities/ events	-- Select --	▼
Road infrastructure – ease of movement within the region	-- Select --	▼
Lack of local job opportunities – forced commuting to Sydney/ Newcastle	-- Select --	▼
Transport & Access – Road, Rail, Water, Air	-- Select --	▼

- Don't know/unsure
- Prefer to not answer
- Other (please specify)

Q5. Please rank the following businesses and industries from 1 (highest) to 5 (lowest) which are best suited and help build the future Central Coast economy:

Professional Services – e.g. finance, legal, accounting, architects, engineers	-- Select --	▼
Advanced Manufacturing - e.g. food technology, precision engineering, 3D printing	-- Select --	▼
Transport, logistics and warehousing	-- Select --	▼
Knowledge industries – e.g. research and development, digital technologies	-- Select --	▼
Health Sector – hospital, medical and allied health services – government and private sector	Select ..	▼

- Don't know/unsure
- Prefer to not answer
- Other (please specify)

DRAFT SUBJECT TO COUNCIL ENDORSEMENT

Online survey questions

Note: Question 6 is a free text box

Q6. Please indicate below the **top three** types of jobs, businesses or industries you believe are most suited to a future Central Coast?

1.

2.

3.

- Don't know/unsure
- Prefer to not answer

Q6. Please indicate below the **top three** words you would use to describe your ideal future Vision for the Central Coast economy?

1.

2.

3.

- Don't know/unsure
- Prefer to not answer

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CENTRAL COAST COUNCIL MARKET RESEARCH

INSIGHTS INTO STAFF AND COMMUNITY PERCEPTIONS

DRAFT SUBJECT TO COUNCIL AND OPPONENT

CENTRAL COAST COUNCIL

MAY 2019





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PROJECT OBJECTIVES

The Central Coast Council (the Council) commissioned an Economic Development Strategy (EDS) for the Central Coast region. The EDS would take a long term view through to 2040 and provide a strategic framework to guide Council's decision-making around sustainable economic development initiatives that assist in creating jobs and stimulating the local economy.

To inform the EDS, consultation were undertaken with business and industry, other levels of government and key stakeholders. Part of this process also included consultations with the residential community and the Council staff. The **overall study objective of this research** was to ...

“to assist in selecting the key themes to drive the economy and the future of the region over the next five years.”

Specifically, the key areas of exploration for the **residential community** research were:

- **Identifying** key strengths and opportunities for the area
- **Understanding** main challenges facing the region

- **Exploring** main businesses, industries, and jobs to build the future economy of the region

- **Exploring** ideas for the ideal future vision of the region

Specifically, the key areas of exploration for the **staff** research were:

- **Identifying** key competitive advantages and challenges for the region
- **Exploring** the core strategic assets to be leveraged for growth
- **Exploring** main growth opportunities and importance factors for future development

...to inform and provide valuable insights in the development of the **Economic Development Strategy** for the Central Coast Council.



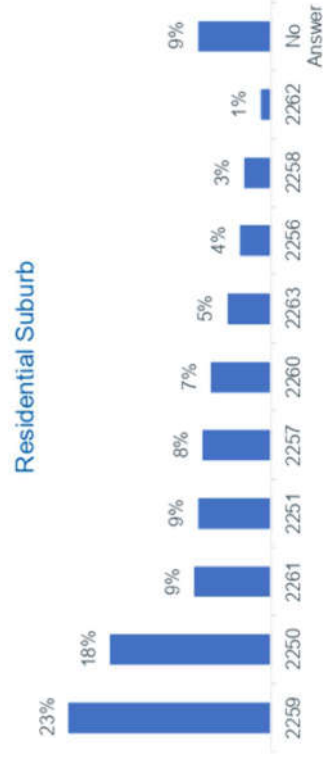
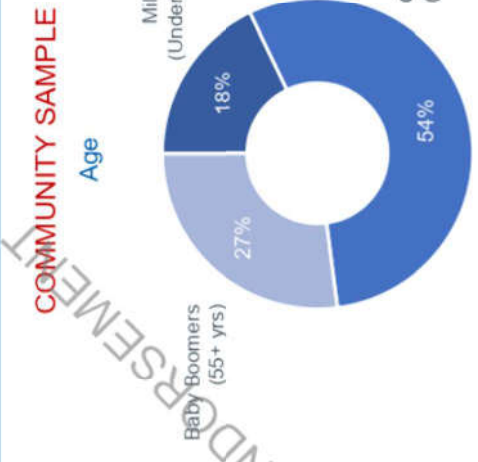
SURVEY DESIGN

COMMUNITY AND STAFF SAMPLING

A quantitative online survey methodology was engaged with the community and staff. A total of n=74 staff and n=211 survey were obtained via the online survey.

The online surveys were scripted and hosted by AEC and the weblinks to the survey distributed by the Council.

A 5 minute questionnaire was utilised, with fieldwork completed between April and May 2019.



aecgroup Ltd.com

Source:
Q1. What age group are you in from the following?
Q1.2. What is your residential suburb?



STRATEGIC INSIGHTS SUMMARY

Key Strengths and Main Challenges

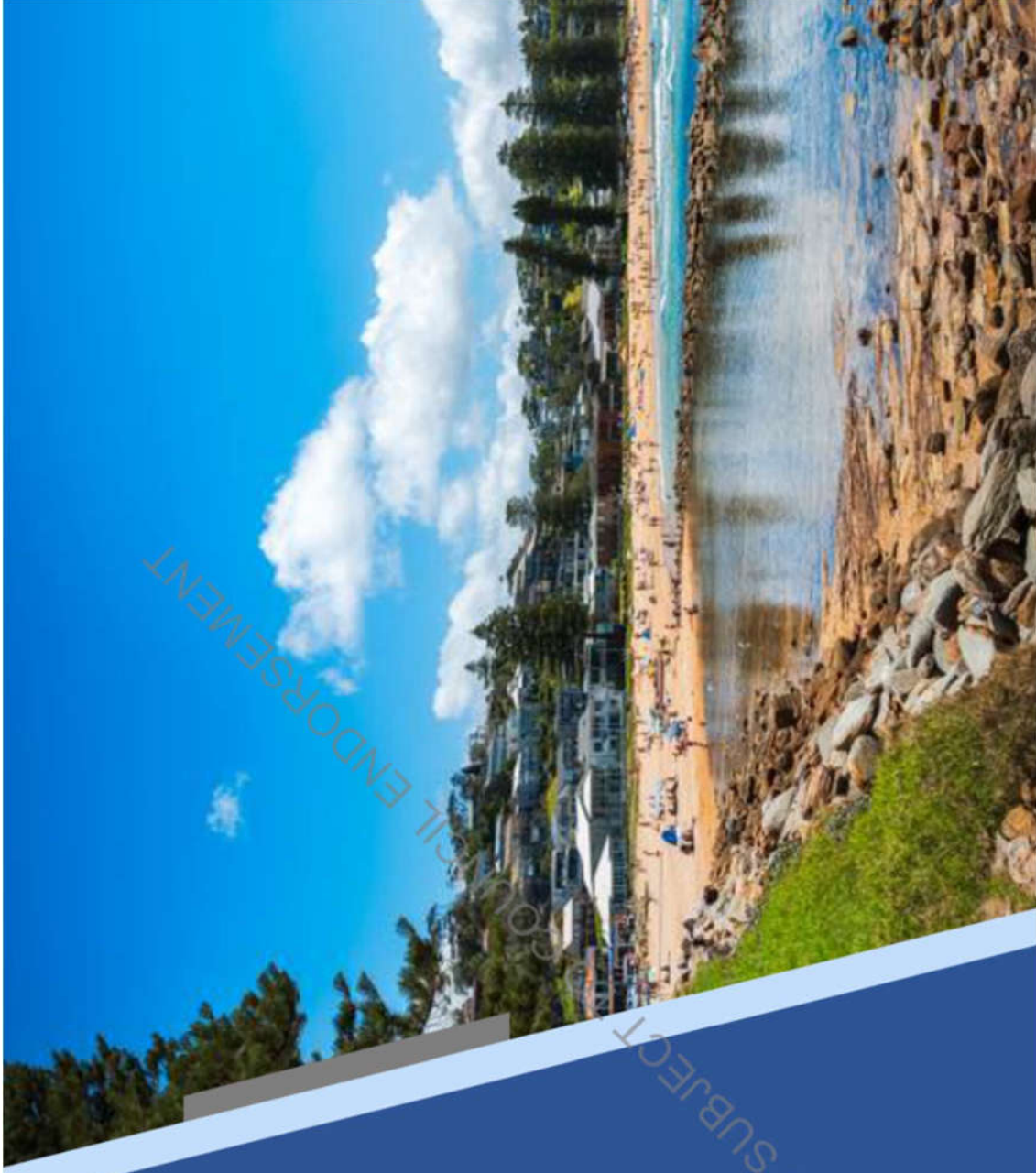
- Lifestyle and liveability of the area are considered key strengths and competitive advantages for the region amongst staff and well as the community. Following lifestyle, the natural environment and accessibility are considered key strengths for the region.
- Amongst the staff and the community, lack of job opportunities and transport were identified as the key challenges for the region.

Opportunities and Future Vision

- Amongst the residential community, business expansion and tourism are seen as key opportunities for the region. Meanwhile, the staff nominated development of 'city based' job opportunities as the main opportunity for the region. Both these aspects are invariable related to increasing jobs opportunities and are linked to the key challenges identified.
- The top three areas nominated by the staff for development and prosperity of the region are linked to infrastructure, jobs and sustainable development. Whilst infrastructure was also identified for ideal future vision by the community, residents specifically highlighted the airport/aviation as the best suited industry for future development and ideal vision of the future.

COMMUNITY FINDINGS

- Key Strengths
- Key Opportunities
- Key Challenges
- Key Businesses and Industries
- Top Jobs
- Top Vision Words





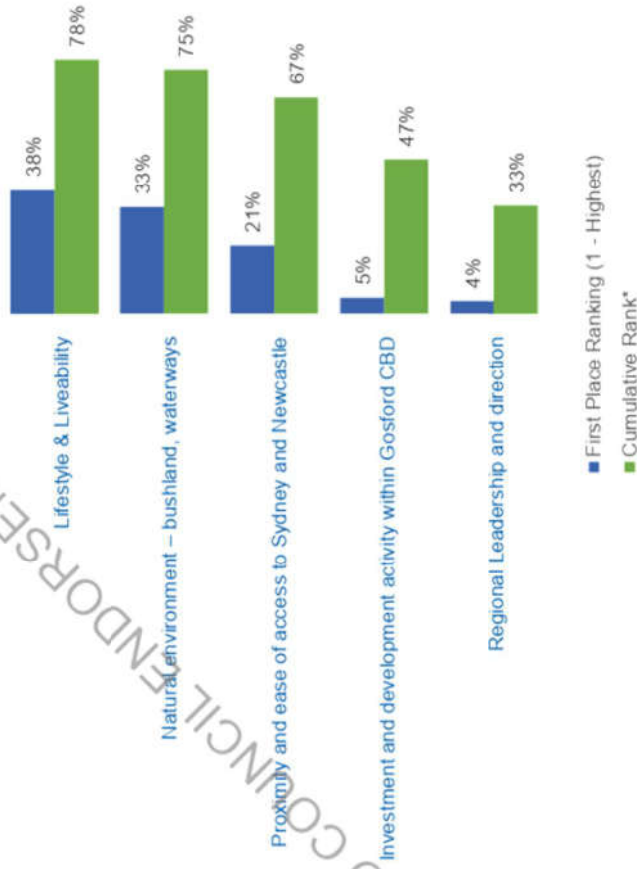
LIFESTYLE AND LIVEABILITY – KEY STRENGTHS FOR THE REGION

KEY STRENGTHS FOR THE REGION

Residents find lifestyle and liveability the key strength for the region...

- Lifestyle and liveability ranked highest of all attributes individually (38%) and overall (78% - an average of all rankings).
- Following lifestyle and liveability, natural environment was ranked as the second top strength for the region (33% first place and 75% cumulative ranking).
- Regional leadership and direction was ranked lowest with 4% ranking this attribute in first place and 33% cumulative ranking.

Key Strengths – Attribute Ranking



EXPANDING AND/OR ATTRACTING MORE BUSINESSES NOMINATED AS THE KEY OPPORTUNITY FOR THE REGION

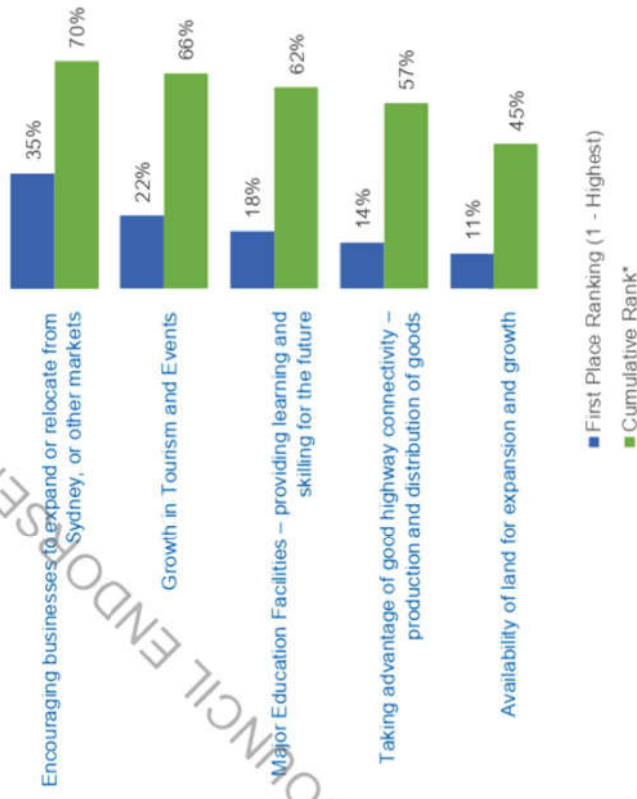


KEY OPPORTUNITIES FOR THE REGION

Increasing business counts was ranked the highest amongst all attributes...

- More than two-thirds (35%) of residents ranked business expansion/attraction as the top opportunity for the region and it also achieved the top rank in cumulative ranking (70%).
- Following business attraction, residents see opportunity for growth in tourism and events with this achieving the second top rank (22% first place and 66% cumulative ranking).
- Whilst business expansion is top opportunity, availability of land for expansion was not much of an opportunity achieving the last rank with 11% at first place ranking and 45% cumulative ranking.

Key Opportunities – Attribute Ranking



LACK OF JOB OPPORTUNITIES FOLLOWED CLOSELY BY TRANSPORT AND ACCESS MAIN CHALLENGES FOR THE REGION

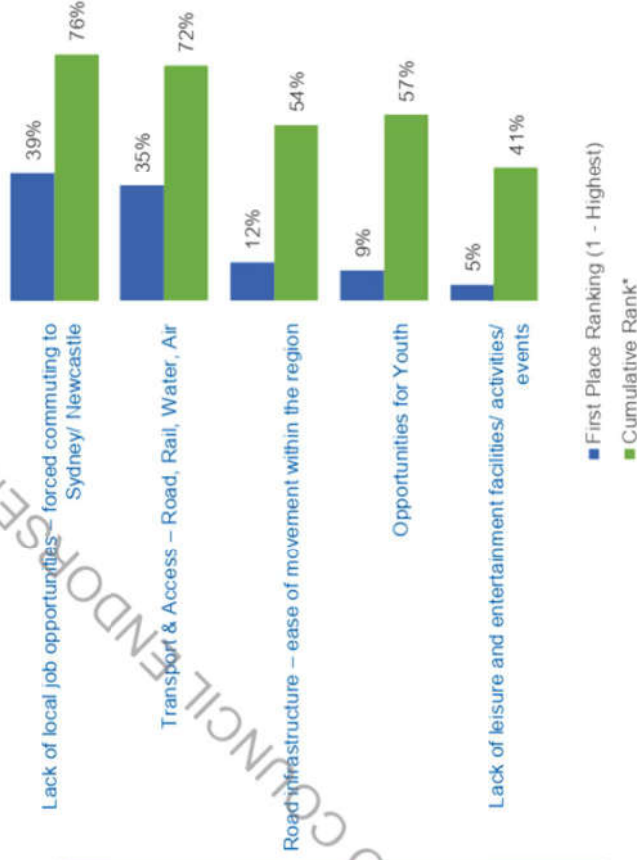
MAIN CHALLENGES FOR THE REGION

The key challenge for the region, ranked highest by nearly 2 in 5 residents, is lack of job opportunities in the region...

- Overall, 76% of residents identified lack of local job opportunities as the main challenge with transport and access trailing close at second place (72%).
- About half find road infrastructure (54%) and opportunities for youth (57%) are key challenges for the region.
- Finally, lack of leisure/entertainment activities was ranked last amongst the other challenges with 5% ranking this in first place and 41% in cumulative ranking.



Main Challenges – Attribute Ranking

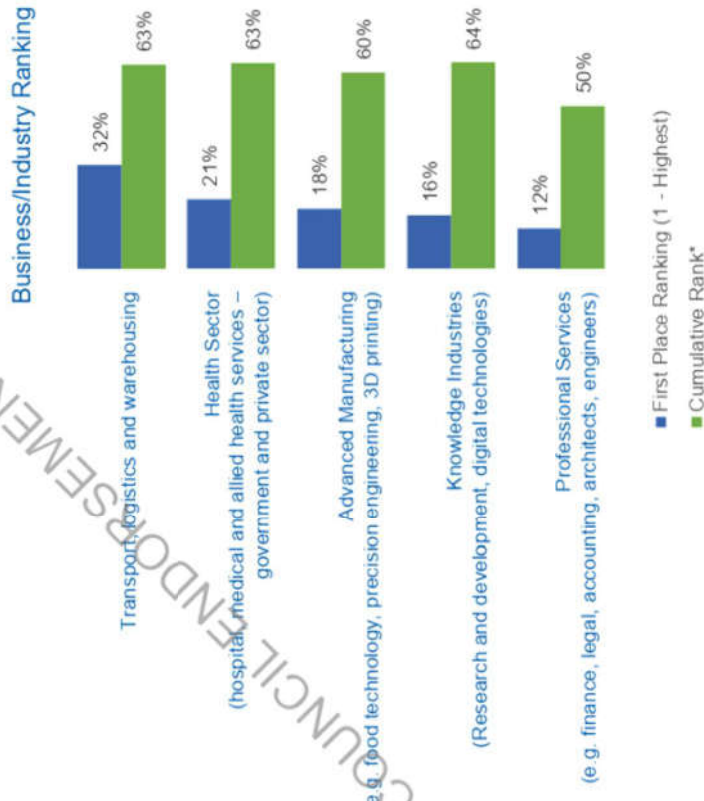


TRANSPORT, LOGISTICS AND WAREHOUSING INDUSTRY IS THE BEST SUITED TO BUILD FUTURE ECONOMY

INDUSTRIES BEST SUITED TO BUILD FUTURE ECONOMY

Nearly a third rated the transport industry the best suited for growth...

- However, it is important to note that when the industries were ranked cumulatively, knowledge industries achieved first place amongst all at 64%.
- Overall, with the exception of professional services (ranking last cumulatively: 50%), there were only minor differences in cumulative proportion rankings.



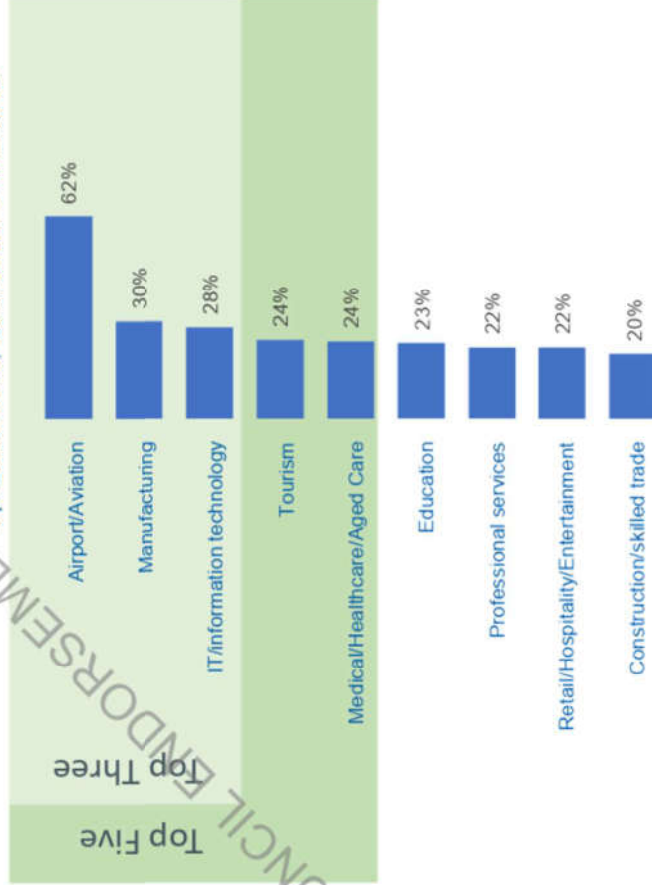
AIRPORT / AVIATION SECTOR BEST SUITED TO THE FUTURE OF THE CENTRAL COAST REGION



TOP SUITED JOBS, BUSINESSES OR INDUSTRIES



Top Suited Jobs, Businesses or Industries



Airport/aviation industry (62%) in clear lead when asked for top three industries most suited to the Central Coast...

Manufacturing (30%) and Information technology (28%) very close in second and third place with Tourism and Medical sectors (24%, respectively) amongst the top five best suited industries for the region.

STAFF FINDINGS

- Competitive Advantages
- Strategic Assets
- Key Challenges
- Core Opportunities

DRAFT SUBJECT TO COUNCIL ENDORSEMENT

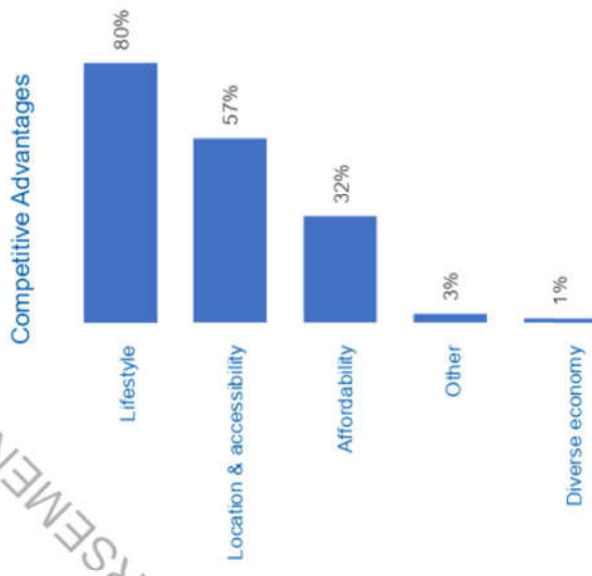


LIFESTYLE TOPS THE LIST AS THE KEY COMPETITIVE ADVANTAGE FOR THE REGION

COMPETITIVE ADVANTAGES

A vast majority of the staff identified 'Lifestyle' as the key competitive advantage for the region...

- Following lifestyle, location and accessibility was key competitive advantage (57%).
- At 1%, diverse economy was least likely to be considered an advantage.



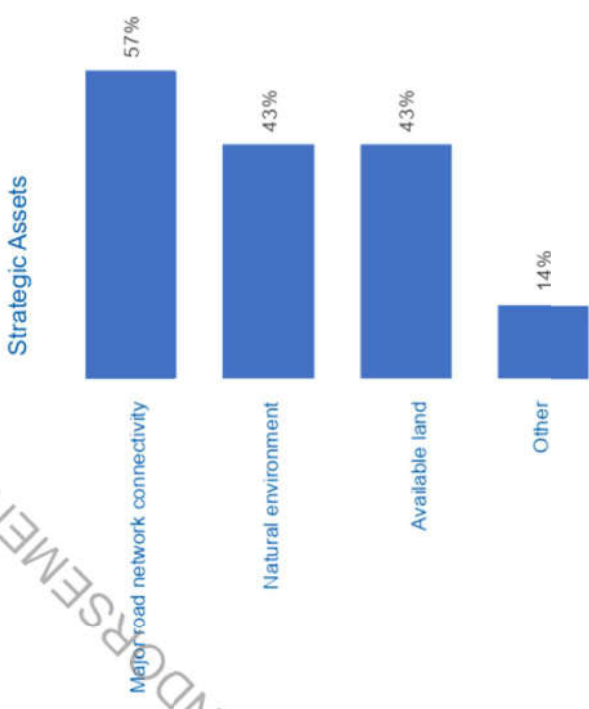
MAJOR ROAD NETWORK CONNECTIVITY – A STRATEGIC ASSET TO BE LEVERAGED



STRATEGIC ASSETS

More than half (57%) the staff find major road network connectivity should be leveraged for business and industry...

- Following road network connectivity, natural environment and available land (43%, respectively) are considered equal strategic assets.



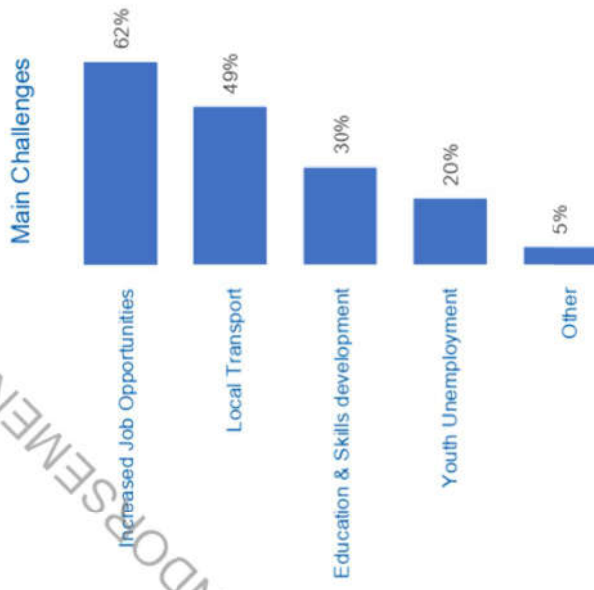


INCREASED JOB OPPORTUNITIES IS THE MAIN CHALLENGE

MAIN CHALLENGES

Increased job opportunities is the key challenge for the region (62%)...

- In addition, nearly half (49%) of staff find local transport is the key challenge holding the region back.



DRAFT SUBJECT TO COUNCIL ENDORSEMENT

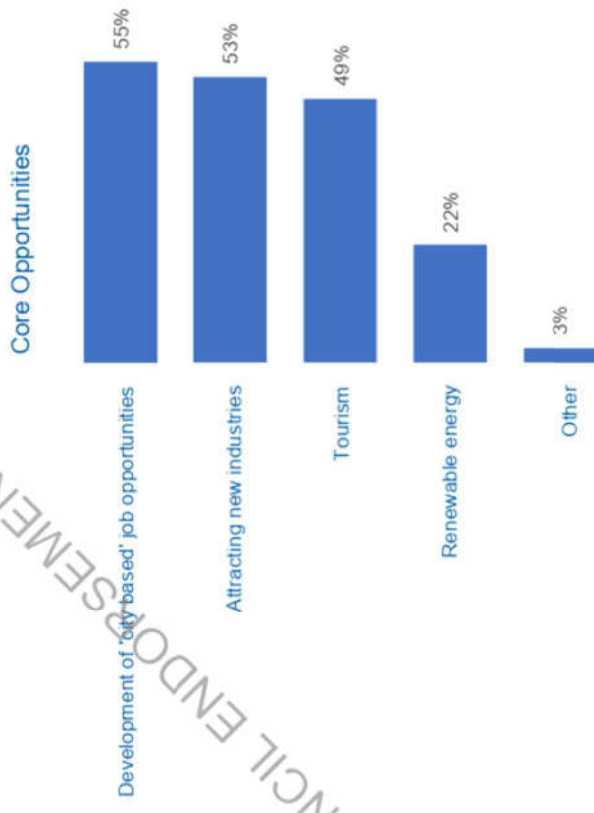
INCREASED JOB OPPORTUNITIES MAIN CHALLENGE AS WELL AS THE CORE OPPORTUNITY



CORE OPPORTUNITIES

Increased job opportunities is the key challenge (62%)* as well as the core opportunity (55%) for the region ...

- Following development of 'city based' job opportunities (55%), attracting new industries (53%) is identified as the core opportunity.
- Renewable energy least likely to be considered an opportunity with only 22% nominating this area.





APPENDIX G: FIRST DRAFT ECONOMIC DEVELOPMENT STRATEGY ENGAGEMENT

The Employment & Economic Development Committee occurred on 17 December 2019 at 5.00pm. A list of attendees can be found in the table below.

Table G1: List of Attendees

Organisation	Title
Australian Business	Business Facilitator
Community Council Central Coast	Executive Officer
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Councillor
Central Coast Council	Unit Manager Economic Development & Project Delivery
Central Coast Council	Executive Manager Innovation & Futures
Central Coast Council	Section Manager Marketing & Tourism
Central Coast Council	Director Roads Transport Drainage & Waste
Central Coast Council	Director Environment & Planning
Central Coast Council	Director Connected Communities
Central Coast Council	Director Water & Sewer
Central Coast Council	Unit Manager Community Partnerships
Central Coast Council	Unit Manager Community Engagement
Central Coast Marine Discovery Centre	Member Employment and Economic Development Committee
NSW Business	Regional Director
Ku-ring-gai Council	Community and Business Engagement Coordinator
Member Employment & Economic Development Committee	

Two Central Coast Round Table Discussion on 26 November 2019 9.30am and 4 February 2020 at 9.00am. A list of attendees can be found in the table below.

Table G2: List of Attendees

Organisation	Title
Aboriginal Affairs	
Aim Big Employment	Regional Manager Hunter, Central Coast & Northern NSW
Australian National University	Associate Professor
Borgs	Planning & Development Manager
Central Coast Council	Chief Executive Officer
Central Coast Council	Unit Manager Economic Development & Project Delivery
Central Coast Council	Innovation & Performance Partner
Central Coast Council	Chief External Funding Coordinator
Central Coast Council	Business & Tourism Development Manager
Central Coast Council	Business and Economic Manager
Central Coast Council	Chief Information Officer
Central Coast Council	Unit Manager Performance & Innovation
Central Coast Council	Chief Information Officer
Central Coast Council	EA to Executive Manager I&F
Central Coast Local Health District	Chief Executive

Department of Premier & Cabinet	Business Development Manager, Hunter & Central Coast
NSW Business Chamber Central Coast	Regional Director
Cities Leadership Institute	Program Manager
CKDS Architecture	Director
Department of Education & Training	
Department of Education & Training	
Department of Education & Training	
Department of Finance	
Department of Planning, Industry & Environment	Team Leader
Department of Planning, Industry & Environment	Director Central Coast and Hunter
Department of Premier & Cabinet	
Department Premier & Cabinet	Coordination Officer (Strategy & Operations)
Department Premier & Cabinet	
DLALC	CEO
DNSW	
Environment	
FACS	
FACS	
Gosford/Erina Chamber of Commerce & GBID Board	President
LA Group	Managing Director
Newcastle University	
NSW Department of Premier & Cabinet	Deputy Director, Regional Development, Hunter & Central Coast
NSW Department of Premier & Cabinet	Assistant Regional Coordinator, Central Coast
NSW Department of Premier & Cabinet	Regional Business Officer
NSW Department Primary Industries	
NSW Justice	
NSW Police	
NSW Police	
NSW Roads and Maritime Services	
NSW TrainLink	Area Manager
OEH Newcastle	
OLG	
Central Coast Industry Connect	Executive Officer
Regional Development Australia Central Coast (RDACC)	Chief Executive Officer & Director
See Change	
See-Change	
Servers Australia	
Tafe NSW	Faculty Director Business, Information Technology & Creative Industries
Tafe NSW	
The Fifth Element	Product Manager
Transport for NSW	Senior Manager Property
Transport for NSW	
Transport for NSW	
Treasury	
University of Newcastle	