Economic Development Strategy Coffs Harbour 2023





Acknowlegement of Country

The City of Coffs Harbour acknowledges the traditional custodians of the land on which we meet, the Gumbaynggirr people, who have cared for this land since time immemorial. We pay our respects to their elders past, present and emerging, and commit ourselves to a future with reconciliation and renewal at its heart.

City Garlambirla junga-ngarraynggi yaanga gungangulam wajaarrgundi yilangandi ngiyaa gawbarri: yaam Gumbaynggirr girrwaa yaamanga-ndi yaam wajaarr jalumbawnyarr ngarraynggang.

Ngiyalagay garla-ngarraynggi yanggidamgundi Guuyunga, Jurruya jalumbawnyarr, giili, waybunyjigam. Baya ngiyalagay yilaana minggiiya gunganbuwa ngayinggirra Girrwaanbiya; garra-buugili.

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Baya ngiyalagay yilaana minggiiya gunganbuwa ngayinggirra Girrwaanbiya; ... garra-buugili Let us hence in the heart be friends and sit together with the First People and be renewed.

Translation provided by Muurrbay Aboriginal Language and Culture Cooperative

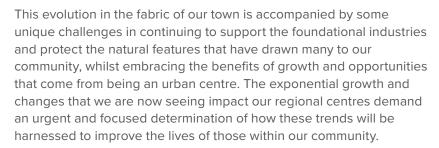
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Foreword by the Mayor

The Coffs Harbour Council is committed to creating a clearly defined pathway towards an intentional identity that is bold in its aspirations. Coffs Harbour has emerged from its origins as a farming, timber and fishing town to become a regional tourism, sport and small business hub. In more recent years, it has become a natural 'sea change' choice for many city dwellers allured by the natural beauty and lifestyle benefits. More people than ever are coming from regional, interstate and international locations to seek a better life here.



The consultation processes behind this document has set the tone and direction for our city and there has been care taken to apply proportion and balance to the vision articulated.

It is through this plan that our city will continue to grow with purpose to meet the priorities and opportunities of a robust, balanced economy. It is important that our plan will not compromise the social and environmental prerequisites that modern communities expect. Our plan identifies many areas of durable, comparative advantage we have over economic competitors and manages our weaknesses responsibly. It provides a blueprint for a robust and resilient local economy. It sets a strong foundation to provide the resources and solutions we will need to be able to face the social and environmental challenges in front of us.

This is an ambitious document in both its magnitude and its balanced agenda as we are an ambitious city capable of exceptional things.

Cr Paul Amos

MAYOR, COFFS HARBOUR CITY COUNCIL







The City of Coffs Harbour is the premier regional city of NSW to live, work, visit and do business

Where things start locally and grow globally

Executive Summary

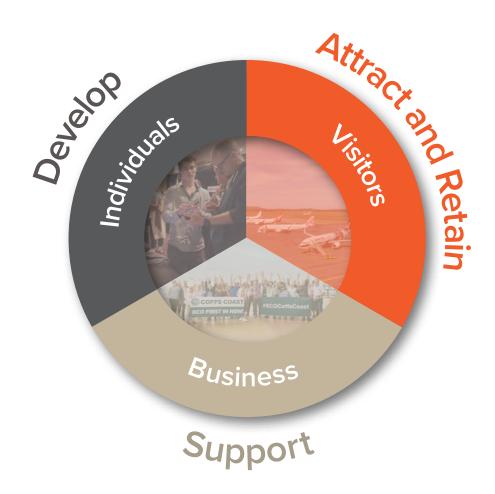
The Coffs Harbour Economic Development Strategy 2023 provides a framework to enable a thriving local economy and its contribution to the economic well-being and liveability of the Coffs Harbour region as a whole. It is a plan to maintain and grow Coffs Harbour as a premier regional city to live, work, visit and do business.

Located approximately halfway between Sydney and Brisbane, the Coffs Harbour LGA has a population of around 78,000 and is renowned for its natural environment and vibrant economic base. The region is known for its agricultural industry, particularly bananas and blueberries, and the 'Coffs Coast' branding has strengthened the region's sporting, cultural, events and tourism profile. Construction, health, retail and hospitality are also dominant industries and contribute to our local population needs.

As a region, we have strong economic opportunities with NBN connectivity and a cluster of economic and employment anchors such as aviation, health, education and sporting facilities. Fostering the growth of South Coffs as an enterprise area, improving connections around our key assets and attracting investment into our City Centre post Pacific Highway Bypass, will support a smarter, healthy city and new economy jobs.

However, we also face challenges. These include the increasing number of climate related events, a global pandemic, limited housing availability and affordability issues. Despite these challenges, the community continues to evolve and progress, business confidence grows, and innovation provides new opportunities.

Our Strategy sets our vision and framework for Coffs Harbour's sustainable economic development over the next five years based on three key pillars and three priorities, with a focus on business, individuals and visitors.



Economic Priorities

In alignment with NSW Regional Economic Development Strategy (REDS) objectives and Council's Community Strategic Plan, the revised 2022–2027 Strategy is focused on sustainable economic development — meeting the needs of the present without compromising the ability of future generations to meet their own needs. Therefore, this Strategy focuses on three economic priorities which underpin the Economic Focus Areas to meet individual, business and visitor outcomes.

Attract / Retain

Priority 1

Attract and Retain necessary skills, capability, investments and people

This priority provides direction on how essential elements for our region's economic success are made available to the businesses and residents of our community. Collaborative programs attract and retain investment, residents, skills, visitation and events, generating improved socio-economic outcomes against the demographic needs of our community.

As a result:

Our community connects with the skills, investment, people and places needed for economic success.

Support

Priority 2

Support local businesses, creating economic, social and environmental sustainability

This priority delivers outcomes to build the resilience and capacity of local businesses to employ, provide and thrive. Key programs and activities provide assistance and education, create collaboration, encourage communication, and support advocacy. Businesses are supported to meet their current needs without compromising the needs of future generations.

As a result:

Our community's businesses are supported and empowered to innovate and do business in a sustainable way.

Develop

Priority 3

Develop existing and future business, industries and places to create a thriving economy

This priority focuses on planning and preparing to leverage our natural endowments and emerging opportunities in new and existing industries. Programs and activities facilitate, promote and deliver skill, product and technology development to meet our future needs and enable a community that thrives and prospers.

As a result:

Our community thrives through exploring and developing known and future economic opportunities.

Sustainable Development Goals

A connected, sustainable and thriving city does more than provide for the local community. It also plans to provide for the needs of today's communities without compromising the ability of future generations to meet their own needs.

The UN Sustainable Development Goals (sdgs.un.org/goals) provide a global roadmap for countries to work towards a better world for everyone — now and into the future.

Our Strategy contributes locally to these global goals, driving economic opportunity through responsible use of resources, inclusive local development, and resilient fair governance. It focuses on goals 4, 8, 9, 10, 11, 12 and 17 that drive sustainable lifestyles for our community.

SUSTAINABLE GOALS





















Our Economic Snapshot

Gross Regional Product

Year ending June 2021	\$3.64b

Industries by Business Numbers

Construction	1,274
Agriculture, Forestry and Fishing	631
Professional, Scientific and Technical Services	627
Rental, Hiring and Real Estate Services	609
Health Care and Social Assistance	542

(ABS 2021)

Tourism Visitation 20/21

Domestic Overnight Visitors	1.6m
Length of stay	3.3 nights

Largest Industries by Total Employment

Healthcare and Social Assistance	5,791
Construction 3,934	3,934
Retail	3,676
Tourism	3,215
Education and Training	2,802

Local Business

Total local businesses	6,164
Non-employing	3,180
1–19 employees	2,828
20 + employees	156

Employment

Resident jobs	31,248
	(NIEIR 2021)
Unemployment rate	3.2%
	(ABC 0/24)

Population

lotal population	/8,/38
	(ABS ERP 2021)
Population forecast by 2041	100,508

Age Structure (in service age groups years)

0–17	18,580	21.3%
18-24	5,296	6.7%
25-49	24,944	29,2%
50-69	20,888	26.5%
70+	12,853	16.3%

(Source Census 2021)

Education Levels

People aged over 15 years had completed Year 12 schooling	38.7%
People aged over 15 years have a post school qualification	47.8%

(Census 20

Our Economic Doughnut Report Card

'Doughnut economics' is a framework for sustainable economic development and has been adapted in our Strategy to measure how our community is tracking as part of its 'End of Term' corporate reporting scorecard. By delivering economic development actions, the aim is to improve our scorecard and achieve a thriving, sustainable and connected community.

Торіс	Target	City Snapshot
Health	Our community lead healthy active lives	28% of Coffs Harbour residents are overweight 26% experience Mental Health Issues 23/9% experience arthritis or osteoporosis
Housing	We collaborate to deliver opportunities for housing for all (we have the ability to access, afford and secure rental or long term housing)	In 2018 14% of households experience housing stress (in the lowest 40% of incomes who are paying more than 30% of their usual gross weekly income on housing)
Environment	We protect the diversity of our natural environment	7,866 ha of environmental protection zoned land 2020*

^{*}Regional State of the Environment Report Summary 2020

Торіс	Target	City Snapshot
Connectivity	Number of households that have internet access	In 2016, 1,890 households in Coffs Harbour urban area (16.7%) did not have an internet connection at the dwelling
Community	We foster a sense of community, belonging and diversity	53% of respondents that feel part of the community
Mobility	TfNSW Targets for regional NSW Walking mode from 4% to 8% Cycling mode from 3% to 5%	Coffs Harbour current: Walking mode 2.9% Cycling mode 0.8%
Culture	We enrich cultural life through art, learning and cultural endeavour	54 % of community satisfied with the opportunities to attend arts and cultural activities in the local government area





Торіс	Target	City Snapshot
Jobs	Building on the natural advantages of our LGA, we champion business, events, sustainability, innovation and technology to stimulate economic growth, investment and local jobs	Resident jobs 31,248 Unemployment rate 3.2%
Income	12,000 additional jobs by 2036 (North Coast Regional Plan)	In Coffs Harbour City, 10.8% of the local workers earned \$1,750 or more per week
Education	We are best prepared to take advantage of opportunities now and in the future (Workforce planning and training opportunities anticipate emerging industries as well as employment and qualification needs within the local economy)	38.7% of people aged over 15 years had completed Year 12 schooling (Census 2016) 47.8% of people aged over 15 years have a post school qualification
Energy	Reduction in annual corporate emissions (tonnes CO2-e) from 2010 levels by 50% by 2025; The use of 100% renewables by the organisation by 2030	Refer to Revised Renewable Energy and Emissions Reduction Plan details

	Торіс	Target	City Snapshot
	Peace & Justice	We address the challenges of family violence, child protection, addiction and road safety	The statistics for domestic violence in Coffs Harbour dropped in 2018, however, have recently increased to 91.7 per 100,000 population
	Social Equity	We address the causes of disadvantage	There are areas within the Coffs Harbour LGA that are in the most disadvantaged 10% in Australia
	Political Voice	We undertake effective engagement and are informed	Voter turnout for local elections in 2021 was 82.91%
	Equality in Diversity	We foster a sense of community, belonging and diversity	75% of community who agree that it is a good thing for our community to be made up of people from different cultures

Source: 2020 End of Term Report

Key Economic Drivers

This table outlines our region's natural or built strengths that our economy can capitalise on, including our economic focus areas and what can help us facilitate our desired economic outcomes.

Endowments —

natural or built strengths in our region where our economy can capitalise

Physical and Geographic:

- Geographic location situated halfway between Brisbane and Sydney
- Coastal amenity (e.g. Solitary Islands Marine Park)
- Arable lands and climate
- Open green space
- National Parks and Forestry Reserves

Institutional and Cultural:

- University
- Formal and informal business networks
- Strong Gumbaynggirr culture and language
- Wide breadth of creative and cultural industries

Built:

- Transport road, rail and air
- Health precinct
- Regional sports precinct and facilities
- Education precinct —University, TAFE and Senior College with new modern facilities
- Flood mitigation

Specialisations —

areas of comparative advantage based on economic focus and resource capacity

Current specialisations include:

- Agriculture, Forestry and Fishing
- Health Care and Social Assistance
- Construction
- Accommodation and Food Services
- Retail Trade
- Arts and Recreation Services
- Rental, Hiring and Real Estate Services
- Education and Training

Targeted specialisations (areas of focus):

- Tourism and Agriculture eco and regenerative
- Creative Industries digital, film and performing arts
- Food nutritional yield, value-add for health and lifestyle benefits

Emerging specialisations include:

- Circular Economy
- Manufacturing

Enablers —

organisations or structures that facilitate desired economic outcomes

Infrastructure

- Bypass due for completion 2026
- Jetty Foreshore
- Airport Enterprise Park
- South Coffs Enterprise Area

Facilities/Institutions

- Southern Cross University
- Coffs Harbour Health Campus
- Innovation Hub
- TAFE NSW

People/skills

- Future Food Systems Cooperative Research Centre (CRC) results
- Gumbaynggirr Culture

Regulations and Policy

ECO Destination Certification

Services and other

- Film Studio (private investment)
- Dorrigo Great Escarpment Walk

Source: Coffs Coast Regional Economic Development Strategy 2018–2022





Economic Influences

Like many communities, the economic vitality of the Coffs Harbour community is influenced by both challenges and opportunities. Understanding the impact of these challenges and the potential opportunities drives the development of our economic focus areas.

Economic Challenges	Impacts for economic development	Opportunities for economic development
Housing affordability/availability Increased cost of living	Lowered ability to attract new workers and skills Loss of productivity due to personal concerns	Development of new housing model Infill development opportunities
Industry composition/lack of diversity	Industry dependenciesOver capitalisationLimited skill base	 Developing industries from endowments/specialisations Strengthening or creating new industry specialisations Access to Government funding, eg. SAP, RJP, RGF
Increasing number of climate- related events, climate change	Insecurity, infrastructure damageIncreased cost of doing businessSupply delivery and business interruptionsReputation risk	 Implementation of sustainable business practices New industries Research and development Regeneration and redistribution principles (i.e small lot agriculture)
Skill and staff shortages	Interruption to business deliveryInterruption to business capacity buildingIncreased customer dissatisfaction	 New business models Technology adaptations Local skill-building, education provision to meet industry needs
Land use planning	Development restrictionsUse conflictMaintenance of healthy, productive lands	 Protection of natural environment Capitalisation on growing demand for green space, eco-related and sustainable industries Coordinate industrial land use with neighbouring LGAs
Cohesiveness of community and government, including adequate and relevant communication	DistrustGovernment support not in line with business needsDifficulty in unified approaches to economic success	 Public/private investment and development Coordinated advocacy Improved communication industry
Population demographics	 High outward migration of young people – loss of vitality, ideas Increasing ageing population – dependence 	 Population serving industry development Mentoring, skill-sharing Targeted attraction of residents, skilled workers and relevant infrastructure
Investment in infrastructure and city services — transport, waste, connectivity, roads	Inability to support growthIsolation (within community and externally)Ageing infrastructure	 Bypass – tourism, connectivity to external areas Regional airport New industries Waste as a resource
COVID-19 pandemic (ongoing)	 Lower visitor/customer numbers Constant change and mental fatigue of business owners/employees Change in workforce dynamics 	 Increased purchase of local products and services Remote working Increased inward migration/decreased outward migration New ways of doing business Focus on local manufacturing

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Economic Development Focus Areas Individuals

Education & Wellbeing

- Develop an Education Prospectus to target student attraction (eg. invitation to metropolitan schools to open one satellite in the LGA).
- Roll out WiFi pilot programs at key public spaces (eg. Toormina Skate Park).
- Partner with organisations who deliver career matching events to showcase employment pathways and opportunities (eg. Coffs Coast Career annual event).
- Deliver at least 2km of new shared pathways in accordance with the Place and Movement Strategy.
- Advocate to NSW TAFE and Southern Cross University for increased education and training courses to align with local skill gaps.

Arts & Culture

- Promote and expand the use of the LGA's Library services with a range of resources and facilities (at least 5,500 additional books and items).
- Pilot a street art program to activate key laneways.
- Attract touring exhibitions to increase Yarrila Place visitation (e.g. Questacon Science Museum's touring exhibit).
- Attract touring shows and exhibits to increase Yarrila Arts and Museum and Jetty Memorial Theatre visitation.



Food & Entertainment

- Increase awareness of the Coffs Coast events calandar and other destination activities (using rate notices and other council channels).
- Attract three events to the LGA to activate public event spaces (such as Park Beach Reserve).
- Attract at least one internationally recognised touring act.
- Attract one creative/cultural event to be delivered at the Jetty Foreshore.
- Work with State Government to enhance Jetty
 Foreshore open spaces (e.g. a super playground)
 and to strengthen its identity as a recreation and
 tourist destination.

Community & Environment

- Grow community awareness of Circular Economy and sustainability through program partnerships (eg.Take 3 for the Sea community recycling programs).
- Identify a new Waste Resource Recovery facility site.
- Initiate the street tree planting program to plant at least 400 replacement trees.
- Promote areas that are identified for new housing and infill development opportunities (e.g. City Centre development incentives).



Economic Development Focus Areas Businesses

Attract

- Develop a campaign showcasing the opportunities and quality of life when moving or returning to the LGA.
- Work with Coffs Harbour Airport Management to expand operations, flight routes, and offer destination marketing support.
- Work with Regional Development NSW and businesses to attract freight, logistics and transportation investment to the LGA.
- Develop a Business & Investment Prospectus to attract venture capitalists to invest in the LGA, including Tourism, Film and Screen, Circular Economy and Agri-Food system (e.g. Regional Food Hub) development opportunities.

Stimulate

- Pilot a hospitality venture at Park Beach Holiday Park.
- Provide connections with government agencies (e.g. DRNSW, Austrade) to build business resilience.
- Support the local agri-food industry by delivering relevant research projects, promotion and agri-tourism opportunities.
- Facilitate information about alternative income streams (i.e. carbon farming).
- Investigate and pilot incentives to activate empty, long-term vacant and nonadvertised commercial properties in the City Centre.

Inform

- Use the Business & Investment Prospectus to promote the benefits of relocation to the LGA for businesses, investors, skilled workers and target age groups.
- Expand on Council's 6 degrees program and website to support new and existing businesses in start-up, innovation and sustainable business development.
- Inform business in preparation for the Pacific Highway bypass.

Support

- Deliver an employment incubator education program to encourage non-employing businesses (56%) to create new positions or outsourced employment opportunities.
- Provide a Business Concierge service that assists community members to start-up, operate and grow a business.
- Deliver industry network collaborations, programs and events for identified industry specialisations (Tourism, Creative Industries, Agrifood Agriculture, Retail, Allied Health/Sport, Construction/Manufacturing).



Economic Development Focus Areas Visitors

Attract

- Implement destination marketing campaigns to key market segments with a focus on high-value travellers.
- Develop an Event Prospectus to attract at least two new major sports, ecotourism, business or cultural events.
- Renew the Coffs Coast Tourism Strategic Plan.
- Maximise tourism opportunities resulting from the Bypass construction project.
- Provide industry with the necessary tools, knowledge and contacts needed to enter the export tourism market.

Return

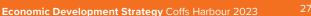
- Collate and report on visitor trend data to inform new initiatives.
- Work with industry and tourism organisations to drive return visitation (eg. special deals, retarget marketing, business/ event visitor offers).



- Leverage our Eco Destination Certification, and highlight businesses delivering accessible, sustainable and cultural tourism products across all Coffs Coast marketing.
- Encourage visitor dispersal across attractions, experiences and villages (e.g. niche interest areas such as business event attendees, golfing holidays and adventure tourism).
- Visitor information is delivered based on best practice, current research and technology.

Support

- Deliver quarterly programs for tourism businesses, introducing international best practice for sustainable tourism.
- Work with accommodation providers to initiate new or upgraded facilities.
- Deliver activation and marketing to support businesses in the City Centre.





Implementing the Strategy

The City's Economic Development Strategy 2023 will be implemented in partnership with the NSW Government, Commonwealth Government, business and industry and supporting partners across the city.

This strategy will be underpinned by a range of action plans that focus on the key priorities of:

- Attract and Retain necessary skills, capability, investments and people
- **2. Support** local businesses and create economic, social and environmental sustainability
- **3. Develop** exisiting and future business, industries and places to create a thriving economy

These action plans will align with the strategic outcomes of the My Coffs Community Strategic Plan 2032, the City's Economic Development Strategy 2023 and the City's Delivery Program 2022–2026 to ensure a sustainable, connected and thriving community.

Internal and external reference groups will ensure ownership of the Strategy and a commitment to its implementation.

The city's business community will continue to be engaged at a partnership level to ensure effective collaboration for the Strategy's development and commitment to the delivery of the strategic outcomes.



Key Definitions

Economics

is the allocation of scarce resources to provide for individuals, businesses, government and nations

Economic Development

is the programs, policies or activities that seek to improve the economic well-being and quality of life for a community

Sustainable Development*

is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

*United Nations Brundtland Commission, 1987





Monitoring Progress

The City will monitor the progress of the Strategy in order to achieve the targets set out in the Strategy. The targets will be monitored through the following methods and sources:

- Tourism Research Australia
- National Institute of Economic and Industry Research (NIEIR)
- Australian Bureau of Statistics
- Australian Business Registration
- City of Coffs Harbour reporting

The measures of success will be monitored quarterly and reported annually within the City of Coffs Harbour's Annual Report. In addition, it is intended that the Strategy will be reviewed in 2025.

Costs of Implementing the Strategy

The projects outlined in this Strategy represent an achievable plan for our economy. This Strategy contains a combination of:

- Signature projects with mid-long term actions that will require investment from other levels of government, private entities and business and industry.
- Lower cost, short term activities and business as usual activities that sustain and grow the economy of the LGA.

This Strategy is a vision to guide sustainable economic development for the LGA and prioritise investment. The Strategy will be used to assess and prioritise funding needs, work collaboratively with partners and underpin bids for funding from all levels of government.

Collaboration and Alignment

Economic Development Collaborators

Government Partners	Business & Industry Partners	Training, Education & Research Partners
 Australian Trade Commission Department of Education, Skills and Employment Regional NSW Regional Development Australia (Mid North Coast) Invest NSW Small Business Commissioner Destination NSW Destination North Coast Service NSW NSW National Parks and Wildlife Service 	Business NSW Coffs Harbour Chamber of Commerce Sawtell Chamber of Commerce Woolgoolga & Northern Beaches Chamber of Commerce Business Women's Network Business and Professional Women's Association Coffs Harbour Blacklight Collective Arts Mid North Coast Business Connect Entrepreneurship Facilitator Ecotourism Australia Green Destinations International	 Southern Cross University TAFE NSW Queensland University of Technology Future Food Systems CRC University of Newcastle Registered Training Organisations Self Employment Assistance

State, Regional and local strategy alignment

- 20-year Economic Vision for Regional NSW 2021
- Coffs Coast Regional Economic Development Strategy (REDS) 2018-2022
- Regional City Action Plan 2036
- North Coast Regional Plan 2036
- MyCoffs Community Strategic Plan 2032
- Local Strategic Planning Statement
- Local Growth Management Strategy
- Renewable Energy and Emissions Reduction Plan 2021
- Coffs Coast Tourism Strategic Plan 2020
- Coffs Harbour Event Strategy 2020
- Creative Coffs Cultural Strategic Plan 2017-2022
- Disability Inclusion Action Plan
- OVID-19 Pandemic Response and Recovery Plan
- Sustainability Policy
- Climate Change Policy
- Biodiversity Action Strategy

