Regional Development Australia
MID NORTH COAST NSW

Attachment 1:

Regional Profile - Statistical Overview

Supporting Documents

An Australian Government Initiative

NSW GOVERNMENT
A NSW Government Initiative

Appendix 1

MID NORTH COAST NSW

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Mid North Coast

Population: 262,682

Topography: 17,218 square kms. The principal catchments of the Mid North Coast are the Macleay and the Manning. The Region is linear from north to south and stretches from the Great Divide to the east coast.[1]

The Mid North Coast region comprises the six Local Government areas of Coffs Harbour, Belligen, Nambucca, Kempsey, Port Macquarie Hastings, Greater Taree and Lord Howe Island.

Federal Parliament Seats

- Cowper
- Lyne

NB: Lord Howe Island is in the Federal electorate of Sydney.

State Parliament Seats

- Coffs Harbour
- Oxley
- Port Macquarie (NB: Lord Howe Island is in the State electorate of Port Macquarie)
- Myall Lakes (includes Great Lakes Council)

Local Government boundaries

- Coffs Harbour City Council
- Bellingen Shire Council
- Nambucca Shire Council
- Kempsey Shire Council
- Port Macquarie Hastings Council
- Greater Taree City Council
- Lord Howe Island

1 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing.

Human Capital

Regional workforce challenges and workforce development priorities

Unemployment rates on the Mid North Coast are higher than the state average. Figure 1 outlines the unemployment rate in each LGA across the Mid North Coast and compares this with NSW.

Unemployment on the Mid North Coast for 2012 was 5.9% compared with a NSW rate of 5.1%.[2]

- Nambucca has the highest unemployment rate at 7.8%.
- Current unemployment rates in Nambucca are 1.9% above the Mid North Coast rate and 2.7% higher than the NSW state average.
- Port Macquarie is the only LGA on the Mid North Coast that has an unemployment rate below the NSW State average at 4.9%.
- Indigenous unemployment in the region is 23.6% which is well above the NSW Indigenous unemployment rate of 16.9%.[3]

Participation Rate[4] and **Youth Unemployment** in the Region is calculated including the Richmond/Tweed/Mid North Coast regions.[5] This puts,Participation rate at 53.8%. *DEEWR 2013.*

- Youth Unemployment at 17.9%. *DEEWR 2013.*
- The NSW participation rate is 64.2 % and NSW youth unemployment is 11.5 % *DEEWR 2013.*

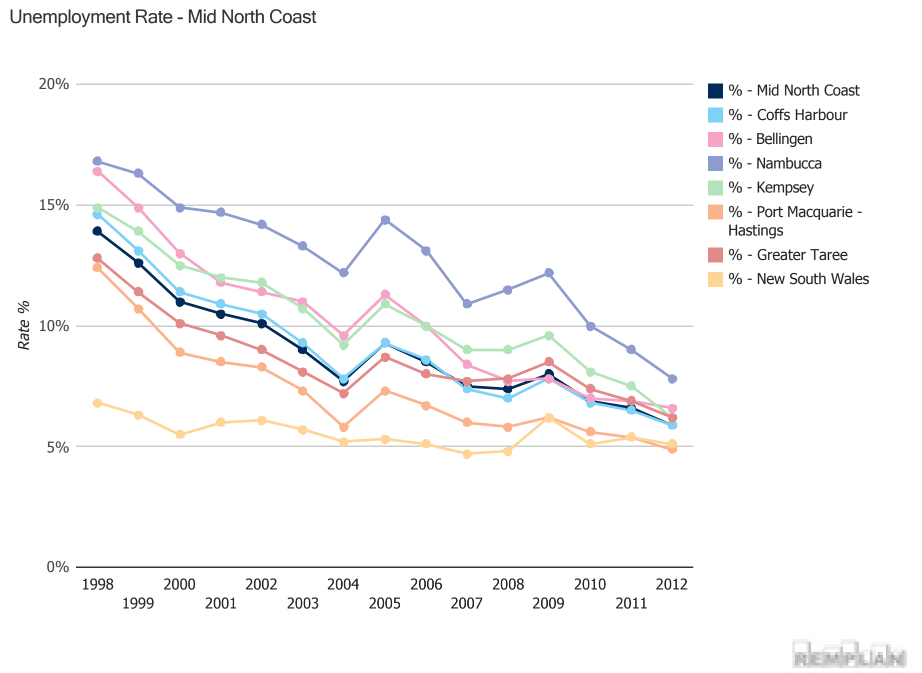

Figure 1. Unemployment rate, Mid North Coast[6]

2 Department of Education, Employment and Workplace Relations (DEEWR), Small Area Labour Markets (SALM), December Quarter 2012.

3 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing.

4 The labour force (persons employed or unemployed) expressed as a percentage of the population.

5 Department of Education, Employment and Workplace Relations (DEEWR) 2013, Labour Force Region Area Profile. www.lmip.gov.au viewed 22nd May 2013

6 Produced with REMPLAN v3, using Department of Education, Employment and Workplace Relations (DEEWR), Small Area Labour Markets (SALM), December Quarter 2012

The Mid North Coast **Labour force** is defined by its high percentage of part-time workers. This is reflective of the seasonal tourism trade which employs 6,100 persons across the Region and places tourism 4th in regards to industry employment levels.[7]

- The MNC has a higher percentage of part time employed workers then NSW with 14.25% of the MNC employed in part time work compared with 13.49% in NSW.
- NSW has 27.66% not in the labour force compared with 36.75% of the Mid North Coast not in the labour force. This is reflective of the high proportion of ageing persons in the Mid North Coast.

Mid North Coast RDA (2011) LGAs		
Labour Force Status	People	%
Employed, worked full-time	50,467	20.30 %
Employed, worked part-time	35,432	14.25 %
Employed, away from work	6,315	2.54 %
Unemployed, looking for full-time work	5,315	2.14 %
Unemployed, looking for part-time work	3,026	1.22 %
Not in the labour force	91,356	36.75 %
Not stated	9,787	3.94 %
Not applicable	45,891	18.46 %
Overseas visitor	1,010	0.41 %
Total	**248,599**	

Figure 2. Labour force employment type, Mid North Coast

The **employment type** on the Mid North Coast indicates we have a higher proportion of unincorporated business owner compared with NSW. Micro-businesses (those employing less than 5 employees) dominate in the Region, representing 84% of all registered businesses (as at June 2011).

- 4.9% of the working population on the MNC are owner managers of unincorporated enterprises compared with the NSW state 3.8%.
- The MNC has a higher percentage of contributing family workers (1%) compared with the state (NSW 0.7%).

The **hours worked** by employees on the Mid North vary in comparison to NSW. This is a reflection of the lifestyle to work ratio. The average hours worked each week in the Mid North Coast is 20.8 with the Australian average at 24.6 hours per week.[8]

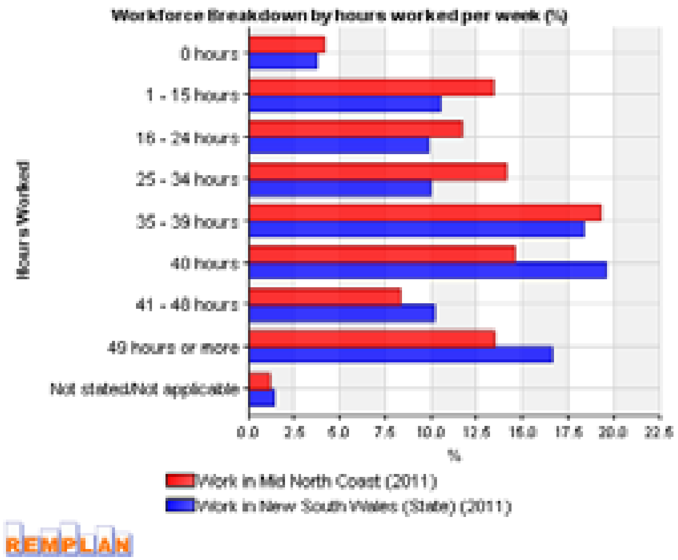

Figure 3. NSW and MNC workforce breakdown by hours worked per week[9]

- 76.1% of the 15-19 year olds in the Mid North Coast are 'Learning or Earning' which is just under the non-metro NSW rate of 77.9% and NSW rate of 81.4%. The lowest result in the region was Kempsey with 71.9% and the highest result was in Bellingen (79.5%).[10]

7 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing

8 National Economics/Australian Local Government Association, 2013, State of the Regions 2013-14, Table 1.3 Snapshot indicators: Investment and employment

9 Produced using REMPLAN v3, with ABS 2011 Census of Population and Housing data

10 Public Health Information Development Unit (PHIDU), January 2013, Social Health Atlas of

Voluntary work on the Mid North Coast is higher than the state average. This is, in part, a reflection of the amount of part-time workers and elderly persons on the Mid North Coast.

- 16.5% of the Population on the Mid North Coast volunteers in comparison to 13.5% in NSW.

The Mid North Coast has a smaller proportion of National and State Government **workers** compared with NSW. [11]

- The Mid North Coast has 4.46% of its workers employed in National and State Government roles compared with NSW which has 5.92%.
- However the Mid North Coast has a higher percentage of workers employed in Local Government Jobs (1.17% compared with 0.67%).

There are high rates of Lifelong Learning (% of working age population participating in education and training) in the region - 47.2%, ranking the Mid North Coast 9th out of the 55 regions in Australia.[12]

- School performance – Primary (% students in top 2 bands), 34.2% ranking the Mid North Coast 18th out of the 55 RDA regions.
- School performance – Secondary (% students in top 2 bands), 26.8% ranking the Mid North Coast 7th out of the 55 RDA regions.

11 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing

12 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

Skills, training and education challenges

Education challenges on the Mid North Coast present as[13]

- Decrease in Infants/Primary and Secondary Government school institution attendance.
- Increase in Infants/Primary and Secondary Other- Non government schools.
- Increase in Tertiary institution attendance.
- An increase in tertiary education attendance challenges the Region to provide tertiary educated positions for those graduates. It also presents an opportunity for education institutions to provide more services if there is greater demand in the Region.
- A decrease in government school institution attendance challenges the Region to increase the quality of education provided in the government institutions.

The Education & Training sector contributes[14]

- 7,435 jobs (9.4 %) to total employment on the Mid North Coast.
- $525.273 million (10.4 %) of total wages and salaries.

13 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing

14 REMPLAN v3, using ABS 2011 Census JTW Employment Data, 2008/09 ABS National Input Output Table, June 2012 ABS Gross State Product

Education profile of the workforce[15]

There has been steady growth in the levels of qualifications people working in the Mid North Coast region have gained. Figure 3 indicates the growth rate of levels of qualification in the Mid North Coast.

Growth Rate per annum of Qualifications, Mid North Coast		
	Growth p.a in qualifications between 2001-2006	Growth p.a in qualifications between 2006-2011
Postgraduate Degree	12.0%	9.7%
Graduate Diploma and Graduate Certificate	4.2%	4.2%
Bachelor Degree	6.4%	5.5%
Advanced Diploma and Diploma	6.4%	3.9%
Certificate Level	4.1%	3.3%

Figure 4. Growth rate in qualifications of Mid North Coast workers

Higher year school completion rates for years 10-12 have increased in the Mid North Coast since 2001. The trend of students leaving school in years 8-9 has declined since 2001.

- Figure 4 identifies a positive shift occurring in the highest year of school completed in the Mid North Coast.

Growth Rate, Highest Year of School Completed, Mid North Coast		
	Growth p.a. 2001-2006	Growth p.a. 2006-2011
Year 12 or equivalent	5.0%	3.9%
Year 11 or equivalent	5.7%	1.9%
Year 10 or equivalent	2.0%	0.4%
Year 9 or equivalent	0.3%	-0.2%
Year 8 or below	-3.7%	-3.0%
Did not go to school	-0.3%	0.7%

Figure 5. Highest year of school completed, Mid North Coast

15 Australian Bureau of Statistics (ABS), 2011, Census of Population and Housing

Factors that may affect the demand and skill profile going forward[16]

The region has seen a shift in its industry employment rankings with the Health and Social Assistance sector now ranking 1st for employment overtaking the retail sector. The Health and Social Assistance sector employs 17.2% of the working population for the Mid North Coast Region.

Figure 5 identifies the change in employment industry between 2006 and 2011 highlighting the significant increase in the Health and Social Assistance sector and the decrease in Retail trade employment.

- The proportion of the workforce classified as Managers and Professionals is 11.1% in the Mid North Coast, which is less than NSW with 16.4%.

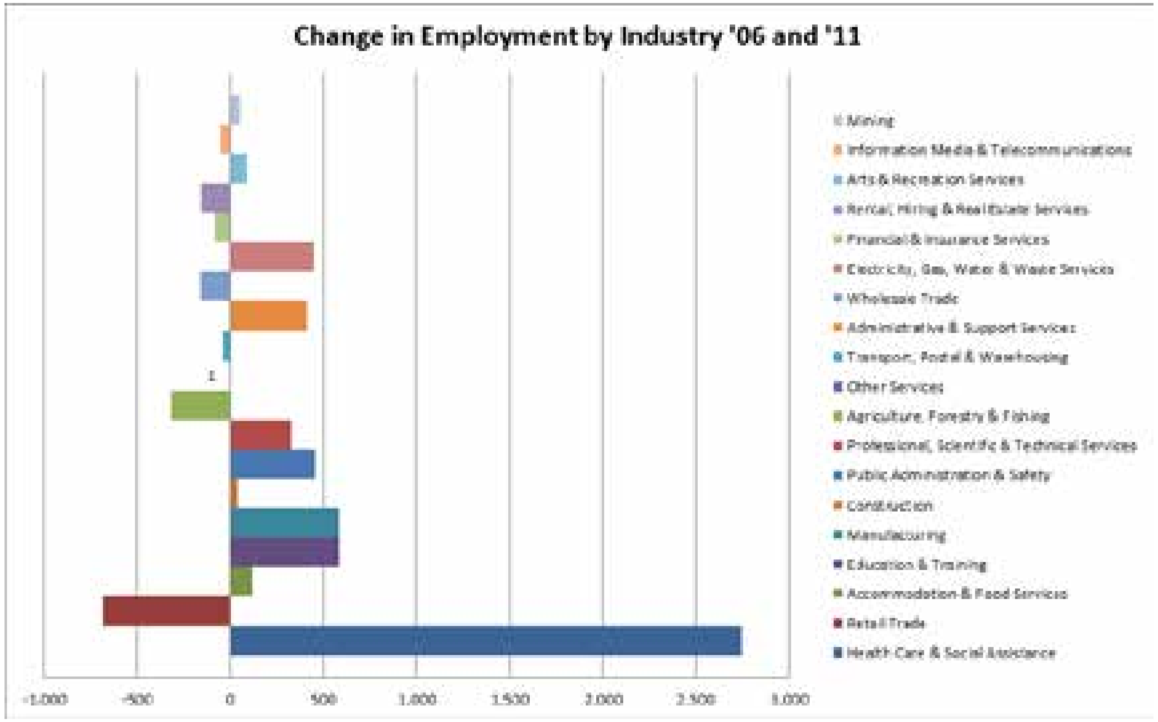

Figure 6. Change in employment industry '06 and '11

16 Australian Bureau of Statistics (ABS), 2006 and 2011, Census of Population and Housing

Further factors[17] impacting the demand and skill profile going forward is the high proportion of elderly in our region and the low proportion of 20-30 year olds. The high proportion of elderly in the Region mirrors the latest employment trends in the Health Care and Social Assistance sector. The increase in this sector will see the Region prosper even more as an attractive destination for retirees.

Figure 6 identifies the high and low proportions of particular age brackets in the Mid North Coast.

The median age for the Region is 45.5 years compared with NSW median age of 38.

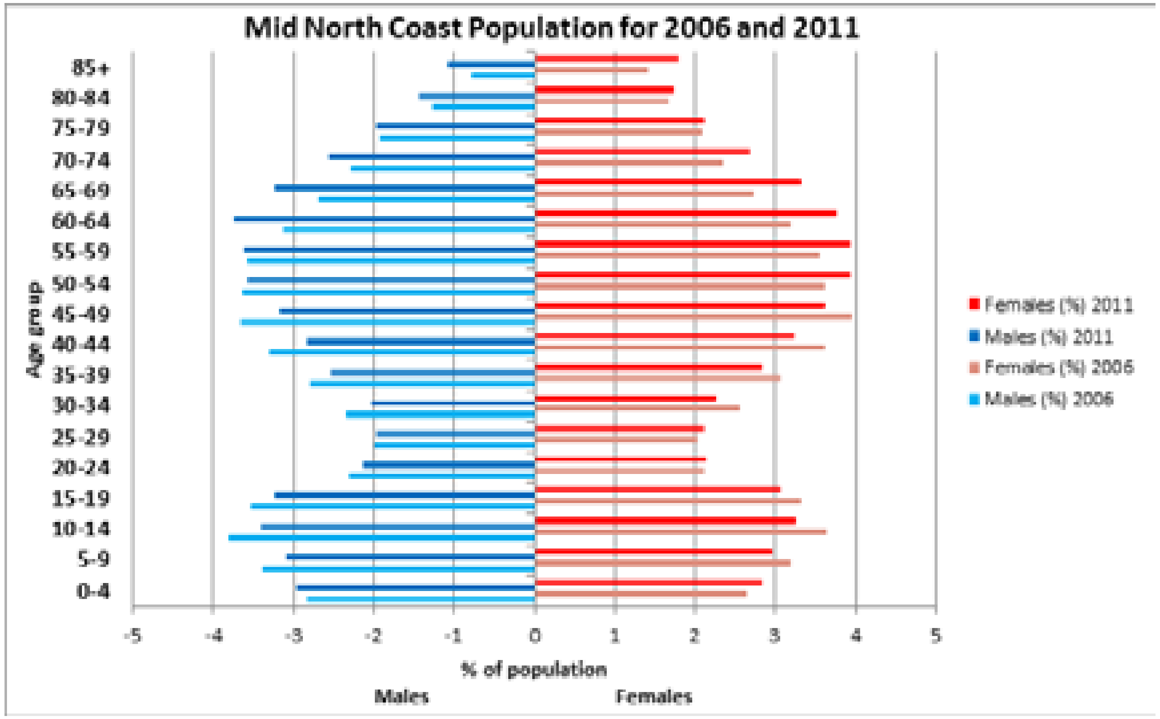

Figure 7. Mid North Coast population graph '06 and '11

17 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

Age comparisons between the Indigenous and non-indigenous population[18]

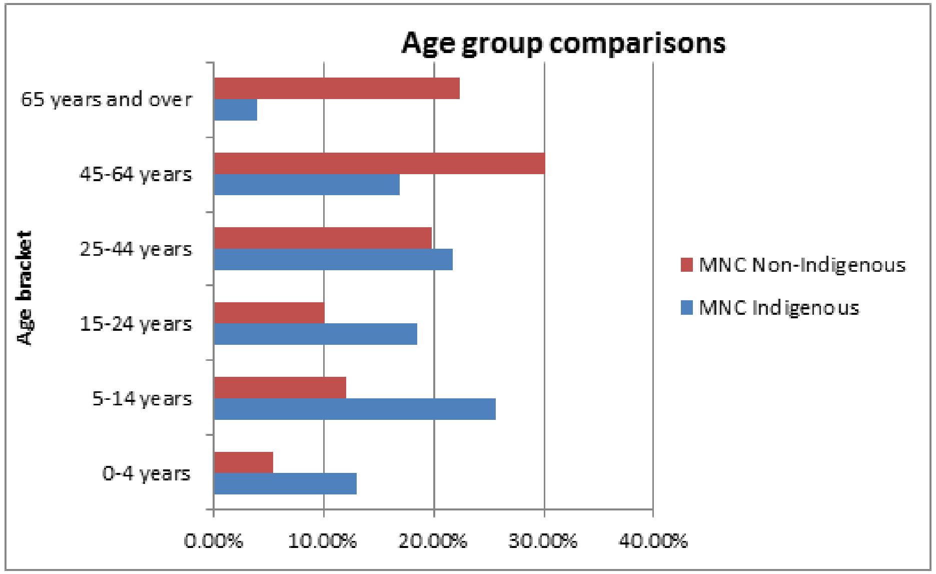

Figure 8. Population graph comparing the age breakdowns of the indigenous and non-indigenous population

- 58% of the Mid North Coast Indigenous population is under 24 years.
- 79% of the Mid North Coast Indigenous population is under 44 years.
- 96% of the Mid North Coast Indigenous population is under 65 years.
- 52% of Non Indigenous persons on the Mid North Coast are over 45 years old.

18 Australian Bureau of Statistics (ABS), 2011 Census of Population and Housing

Aboriginal & Torres Strait Islander Profile[19]

- Indigenous unemployment in the region is 23.6% which is well above the NSW Indigenous unemployment rate of 16.9%.
- 7.3% of the state's indigenous population reside in the Mid North Coast (2011), up from 7.15% in 2006.
- Although the Mid North Coast has 5.1% ATSI population, there are large differences within the regions local government areas. Both Bellingen and Port Macquarie have 3% ATSI population while Kempsey has 11.1% and Nambucca 7.3%.
- The growth in the Aboriginal and Torres Strait Islander population is more than 5 times the total population growth of the region (5.4% per annum growth between 2006 and 2011). This compares to an ATSI population growth rate of 4.9% p.a. from 2006 to 2011 for NSW.
- 1.5% of the identified ATSI population in the Mid North Coast are self employed – which compares favourably to NSW (1.35%) and Australia (1.2%), however there are further opportunities to increase the level of indigenous self employment. Currently, 4.3% of the Mid North Coast population over 15 years are self employed.
- For the Mid North Coast, out of 12 selected offences (reported by the Bureau of Crime Statistics and Research), the Indigenous population comprise 28.4% of offences compared with a NSW result of 16.7%.[20]

19 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

20 Bureau of Crime Statistics and Research (BOSCAR), NSW Recorded Crime Statistics 2008-2012, viewed 5th July 2013, www.bocsar.nsw.gov.au

Sustainable Communities & Population Growth

Economic

Socio economic profile[21]

The median income on the Mid North Coast amounts to 66.8% of the median NSW income. This smaller proportion of income corresponds with lower cost housing options. Data reveals that although incomes in the Mid North Coast have risen an extra 0.3 % points per annum (2006-2011) compared with NSW as a whole, Mid North Coast income is still largely below the median income for NSW. Figure 8 identifies the comparisons between NSW and Mid North Coast incomes between 2006 and 2011.

Jobless families[22]

There is a high presence of jobless families with children under 15 years in the Mid North Coast (22.0%), with NSW at 14.1% and non-metropolitan NSW 16.5%. There is also a large disparity within the Mid North Coast with jobless families, e.g. Kempsey 31.3% and Port Macquarie 16.2%.

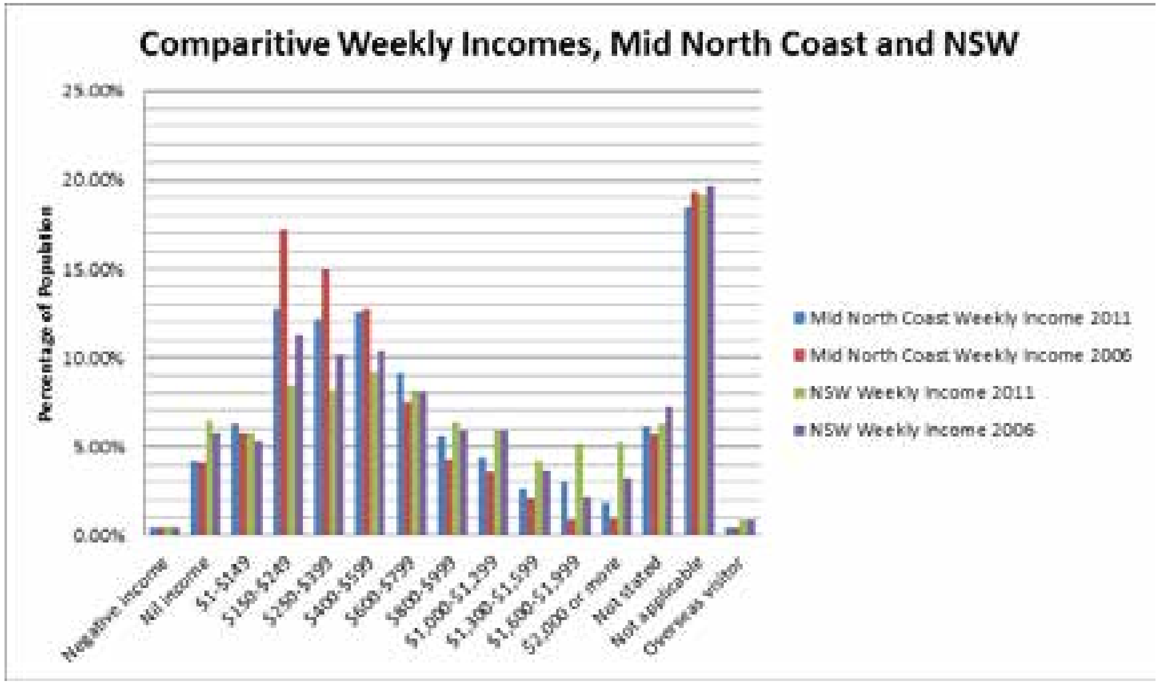

Figure 9. Comparative weekly incomes, Mid North Coast and NSW

21 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

22 Public Health Information Development Unit (PHIDU), January 2013, Social Health Atlas of Australia: NSW and ACT Data by Local Government Area

Household incomes[23]

- Household incomes in the Region also remain lower than the state average.
- The corridor between Sydney and Brisbane which incorporates the Northern Rivers, Mid North Coast and Hunter Regions has an overall higher household income. Figure 9 highlights the distinction between the 3 average household incomes.
- The Mid North Coast has a much higher proportion of household earning less than NSW up until the $1,500 mark and then as Figure 9 outlines the proportion of Mid North Coast households earning above this drops below NSW.

Welfare dependence[24]

- Welfare dependence (% of the population which Government welfare is the main income source) on the Mid North Coast is 20.3%. This result ranks the Mid North Coast 34th out of the 55 RDA regions in Australia.
- This is typical of a retirement/lifestyle region. In comparison to other lifestyle regions, the Central Coast records 18.7% (ranked 23rd) and Northern Rivers 22.5% (ranked 50th).
- The Mid North Coast has a higher proportion of its population receiving, Disability Support, Unemployed support and youth allowance than the Australian average.

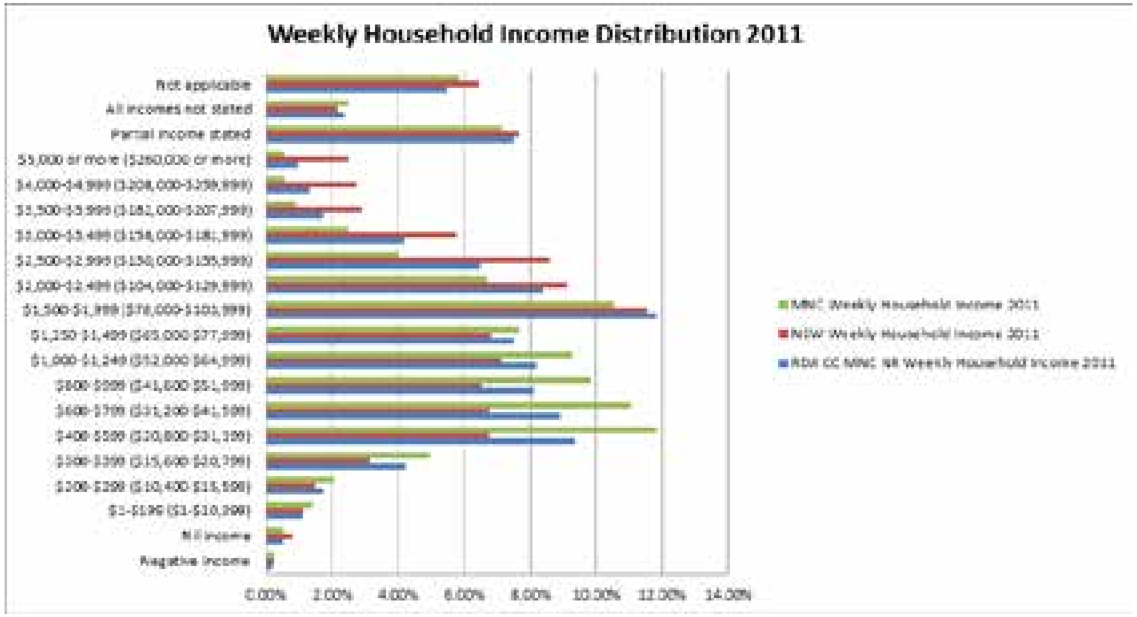

Figure 10. Weekly household income distribution 2011

Social Security Mid North Coast		
	% Pop	Australian Average
Disability Support (aged 15-20)	0.13%	0.09%
Disability Support (aged 21-24)	0.22%	0.14%
Disability Support (aged 25+)	5.80%	3.31%
Parenting Payment- Single (aged 15-20)	0.02%	0.04%
Parenting Payment- Single (aged 21-24)	0.09%	0.20%
Parenting Payment- Single (aged 25+)	0.56%	1.23%
Unemployed Long Term	2.64%	1.45%
Unemployed Short Term	1.29%	0.92%
Youth Allowance- Non Student	0.75%	0.39%
Youth Allowance- Student	1.62%	1.29%

Figure 11. Social security payments, Mid North Coast

23 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

24 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

Changes in industry composition and challenges these present for sustainability[25]

Industry composition has shifted over time as new infrastructure, new markets and new technology trends advance. Figure 10 (next page) advises the current industry rankings.

- Retail trade has dropped in Output, Employment and Export ranking since 2006. Its ranking has remained consistent in Value added even though its value added figures have decreased.
- Health Care and Social Assistance has taken the lead in Employment with a significant increase in jobs within the Region. An additional 2,744 jobs have been created in this sector over the past 5 years, representing a 5% per annum growth rate.

The economic diversity of the Mid North Coast is scored 0.1, ranking this region the 13th most diverse economy out of the 55 RDA regions in Australia. For comparative example, the Mid North Coast economy is more diverse than the Hunter region (0.15, ranked 18th).[26]

25 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

26 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

Top 10 Mid North Coast Industry Sectors (by Output, Employment, Value-added & Exports) 2013[27]

Rank	Output*	% MNC Industry Output	Rank +/- from '10-'11	Employment	% MNC Employees in industry	Rank +/- from '10-'11	Value Added**	% Value added in industry	Rank +/- from '10-'11	Exports	% MNC exports in industry	Rank +/- from '10-'11
1	Manufacturing	16.00%	-	Health Care & Social Assistance	17.20%	+1	Rental, Hiring & Real Estate Services	15.00%	-	Manufacturing	28.30%	-
2	Rental, Hiring & Real Estate Services	10.90%	-	Retail Trade	14.60%	-1	Health Care & Social Assistance	11.00%	-	Electricity, Gas, Water & Waste Services	13.70%	-
3	Construction	10.60%	-	Accommodation & Food Services	9.70%	-	Manufacturing	7.60%	-	Agriculture, Forestry & Fishing	10.00%	-
4	Health Care & Social Assistance	7.70%	+1	Education & Training	9.40%	-	Financial & Insurance Services	7.20%	-	Accommodation & Food Services	8.30%	-
5	Electricity, Gas, Water & Waste Services	6.40%	+5	Manufacturing	6.60%	-	Retail Trade	7.10%	-	Health Care & Social Assistance	6.10%	+5
6	Retail Trade	5.60%	-2	Construction	6.30%	-	Construction	6.90%	-	Transport, Postal & Warehousing	4.40%	-1
7	Accommodation & Food Services	5.30%	-1	Public Administration & Safety	5.80%	-	Education & Training	6.50%	-	Construction	4.30%	+7
8	Financial & Insurance Services	4.80%	-1	Professional, Scientific & Technical Services	4.30%	+2	Electricity, Gas, Water & Waste Services	6.40%	+3	Financial & Insurance Services	4.30%	+1
9	Professional, Scientific & Technical Services	4.50%	-2	Agriculture, Forestry & Fishing	4.10%	-1	Public Administration & Safety	5.10%	-1	Wholesale Trade	3.60%	-3
10	Agriculture, Forestry & Fishing	4.30%	-1	Other Services	4.10%	-1	Accommodation & Food Services	4.50%	-1	Rental, Hiring & Real Estate Services	3.20%	-2

Figure 12. Industry rankings, Mid North Coast 2013

Tourism Sector

The Tourism sector does not have an industry classification. However, estimates have been made by deducting estimated output generated by tourism for each industry sector and combining this as Tourism sector.

	Tourism	5.2%		Tourism	8.0%		Tourism	5.0%				

***Output** = turnover/revenue

****Value-added** = goods and services purchased which are used in a further production process (eg wheat), through which value is added to the final product (eg flour, bread).
Take an example - A farmer selling $100 of wheat to the mill adds $100 value, the mill turning the wheat into flour and selling it to the baker for $200 adds another $100 ($200 - $100 purchase), the baker selling bread for $300 adds another $100 in value added ($300 - $200 purchase). Total value added in this example is $300 (farmer, miller and baker each adding $100) which also equals the sell price of the final product.

27 REMPLAN v3, using ABS 2011 Census JTW Employment Data, 2008/09 ABS National Input Output Table, June 2012 ABS Gross State Product, June 2011 ABS Gross State Product, ABS 2011-12 Tourism Satellite Account

The highest ranking output industry sector is the manufacturing industry. The manufacturing industry is currently a net importer, to the tune of $241.8 million. Consideration of the manufacturing sub-sectors makes clear distinction between the manufacturing industries that are net importers and the manufacturing industries that are net exporters.

- The largest net exporting sub-sectors are Saw mill, Wood and Paper Product Manufacturing ($102.2m net export) and Food Product Manufacturing ($79.4 net export).

Figure 12 outlines the level of economic output by manufacturing sub-sectors for the Mid North Coast.

Largest food product manufacturing sectors[28]

Sub-sector	Output (m)	Net Import / Net Export (m)
Meat and Meat Product Manufacturing	$201.173	$42.709 Net Exporter
Other Food Product Manufacturing*	$151.014	$2.413 Net Exporter
Processed Seafood Manufacturing	$138.517	$34.31 Net Exporter
Dairy Product Manufacturing	$111.666	$21.258 Net Exporter
Bakery Product Manufacturing	$57.626	$15.786 Net Importer
Fruit and Vegetable Product Manufacturing	$15.107	$5.025 Net Importer

Figure 13. Largest food product manufacturing sectors

*This includes potato/corn and other crisps production, prepared animal and bird feed, and other non-defined food manufacturing.

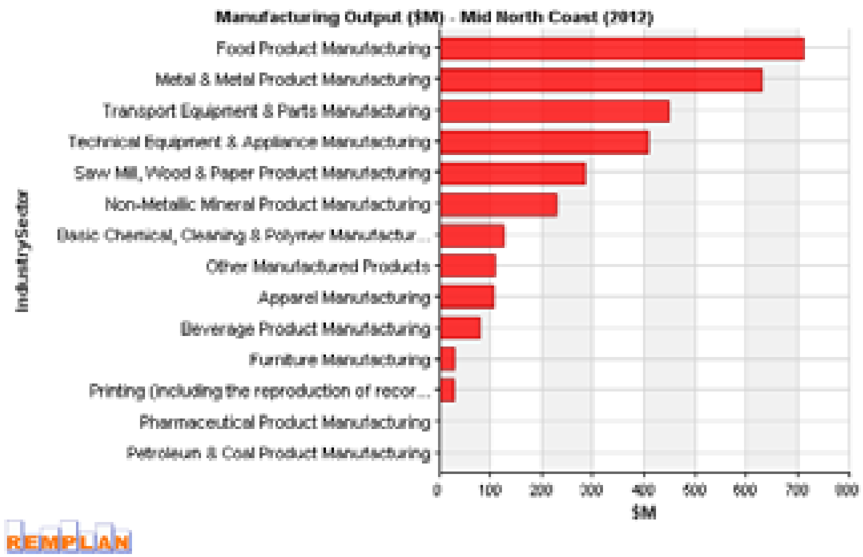

Figure 14. Manufacturing output, Mid North Coast, 2012

28 REMPLAN v3, using ABS 2011 Census JTW Employment Data, 2008/09 ABS National Input Output Table, June 2012 ABS Gross State Product

Local infrastructure[29]

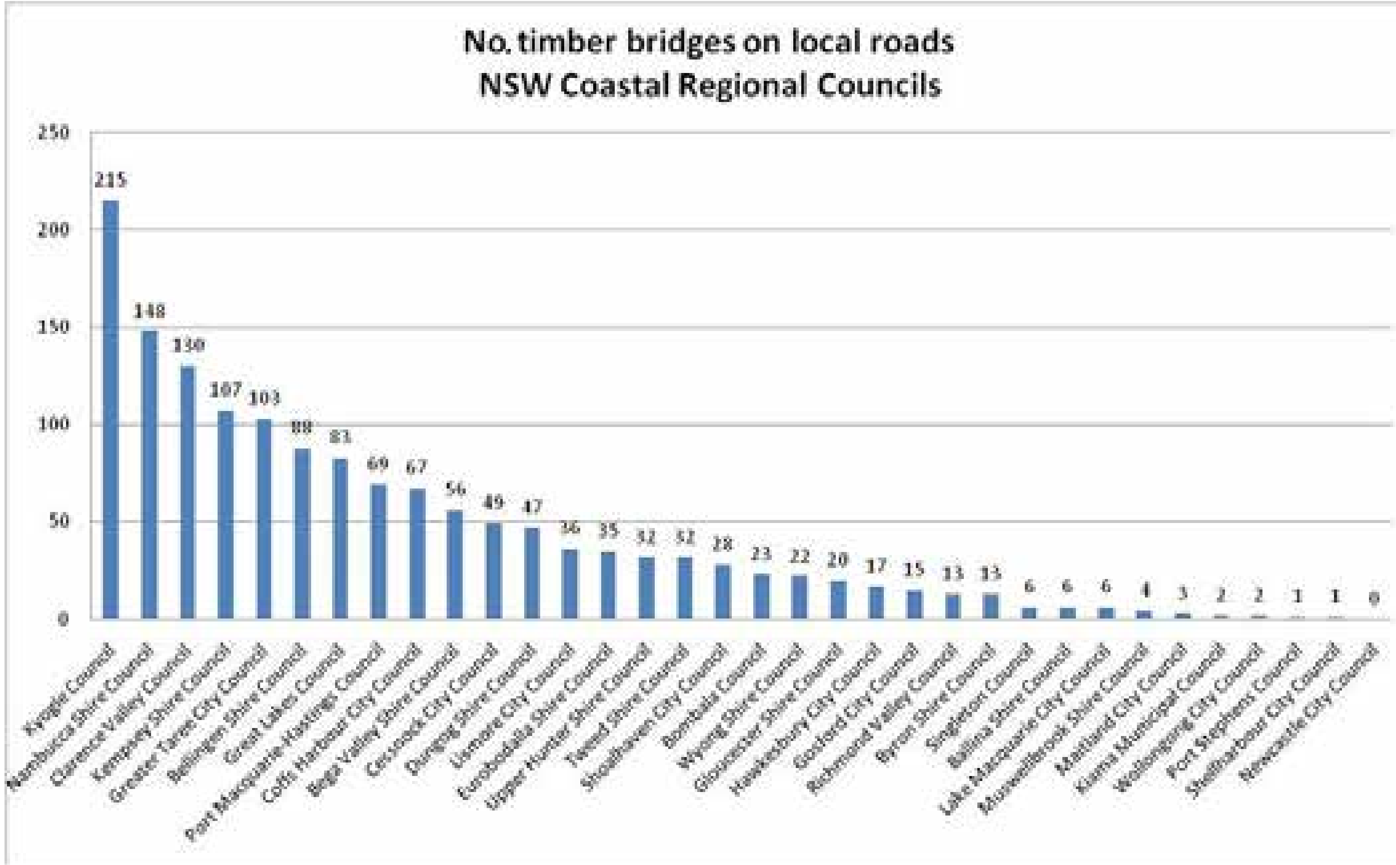

Figure 15. Timber bridge numbers, Mid North Coast

A backlog of infrastructure has been identified by Local Councils and is identified in the above table related to wooden bridges on local roads.

29 Created by Greater Taree City Council, 2012

Tourism[30]

Key measures Mid North Coast tourism

	Port Macquarie	Nambucca	Kempsey	Taree	Coffs Harbour	Bellingen	Mid North Coast	NSW	Mid North Coast as % of NSW
Total visitors (overnight & day trips) ('000)	1,437	239	489	675	1,493	253	4,586	73,759	6.2%
Total nights ('000)	2,809	476	1,151	911	2,609	345	8,301	142,271	5.8%
Total spend ($million)	$430	$73	$173	$163	$406	$62	$1,307	$23,592	5.5%

Figure 16. Key measures Mid North Coast tourism

Tourism - purpose of visit to Mid North Coast

	Port Macquarie		Nambucca		Kempsey		Taree		Coffs Harbour		Bellingen		Mid North Coast		NSW	
	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.
Holiday	52.70%	54.50%	60.90%	82.10%	71.20%	83.90%	49.40%	68.60%	54.60%	87.60%	53.60%	79.10%	57.60%	75.90%	43.90%	56.40%
Visiting friends and relatives	30.40%	20.80%	31.80%	15.30%	23.90%	9.70%	38.30%	27.80%	33%	9.50%	38%	17.40%	32.50%	16.75%	35%	24.90%
Business	11.70%	7.90%	2.70%	n/a	2.80%	n/a	9.10%	n/a	7.20%	1.40%	5.50%	n/a	6.50%	n/a	17.50%	15.30%
Other	4.60%	16.90%	4.10%	n/a	1.70%	n/a	3%	n/a	4.80%	n/a	2.80%	n/a	3.50%	n/a	5.30%	11.80%

Figure 17. Purpose of visit

30 Retrieved from National visitor Survey and International Visitor Survey Sep 2008-Sep 2011 Tourism Research Australia www.destinationnsw.com.au

Transportation modes to and from the Mid North Coast for domestic and international visitors vary depending on the LGA. The following figure 16 identifies the top 3 transportation types for each LGA.[31]

		Port Macquarie	Nambucca	Kempsey	Taree	Coffs Harbour	Bellingen
Domestic	1	Private or Company Vehicle	Private or Company Vehicle	Private or Company Vehicle	Private or Company Vehicle	Private or Company Vehicle	Private or Company Vehicle
	2	Air Transport	Air Transport	Bus or Coach	Bus or Coach	Air Transport	Air Transport
	3	Railway	Railway	Air Transport	Air Transport	Rented or Hired Vehicle	Bus or Coach
International	1	Rental Car	Private or Company Car	Private or Company Car	Private or Company Car	Rental Car	Rental Car
	2	Private or Company Car	Rental Car	Rental Car	Rental Car	Long Distance Coach or Bus	Self- drive Van, Motor Home or Campervan
	3	Long Distance Coach or Bus	Self- drive Van, Motor Home or Campervan	Self- drive Van, Motor Home or Campervan	Self- drive Van, Motor Home or Campervan	Private or Company Car	Private or Company Car

Figure 18. Transportation modes to and from Mid North Coast

For statistical information relating to figure 16 please visit: www.destinationnsw.com.au

31 Retrieved from National visitor Survey and International Visitor Survey Sep 2008-Sep 2011 Tourism Research Australia www.destinationnsw.com.au

The top 3 accommodation types accessed when visiting the Mid North Coast are identified below and highlighted by international and domestic visitors.[32]

		Port Macquarie	Nambucca	Kempsey	Taree	Coffs Harbour	Bellingen
Domestic	1	Friends or relatives property	Friends or relatives property	Caravan park or commercial camping ground	Friends or relatives property	Friends or relatives property	Friends or relatives property
	2	Hotel, resort, motel or motor inn	Caravan park or commercial camping ground	Friends or relatives property	Caravan park or commercial camping ground	Hotel, resort, motel or motor inn	Caravan park or commercial camping ground
	3	Rented house, apartment, flat, unit	Rented house, apartment, flat, unit	Rented house, apartment, flat, unit	Hotel, resort, motel or motor inn	Caravan park or commercial camping ground	Hotel, resort, motel or motor inn
International	1	Friends or relatives property	Friends or relatives property	Friends or relatives property	Friends or relatives property	Friends or relatives property	Friends or relatives property
	2	Backpacker/ hostel	Rented house, apartment, flat, unit	Caravan park or commercial camping ground	Hotel, resort, motel or motor inn	Backpacker/ hostel	Backpacker/ hostel
	3	Hotel, resort, motel or motor inn	Caravan park or commercial camping ground	Rented house, apartment, flat, unit	Caravan park or commercial camping ground	Rented house, apartment, flat, unit	Caravan park or commercial camping ground

Figure 19. Accommodation types tourism, Mid North Coast

For statistical information relating to accommodation please visit: www.destinationnsw.com.au

32 Retrieved from National visitor Survey and International Visitor Survey Sep 2008-Sep 2011 Tourism Research Australia www.destinationnsw.com.au

Origin of visitors[33]

Figure 18 identifies the origin of domestic visitors to each LGA in the Mid North Coast.

	Port Macquarie	Nambucca	Kempsey	Taree	Coffs Harbour	Bellingen	Mid North Coast	NSW
Regional NSW	43.70%	44.70%	45.60%	50.10%	37.30%	40.10%	43.58%	35.50%
Sydney	38.10%	25.20%	40.70%	34.20%	30.10%	35.60%	33.90%	26.60%
Total Interstate	81.70%	69.90%	86.30%	84.30%	67.40%	75.50%	77.51%	62.20%
Victoria	5.50%	5.90%	3.50%	3.60%	7.10%	6.40%	4.70%	13.90%
Queensland	7.20%	19.50%	8.90%	9.80%	20.30%	15.40%	13.51%	13.30%
ACT	2.40%	n/a	0.90%	0.80%	2.70%	n/a	1.10%	4.20%
Other Interstate	3.10%	3.80%	0.50%	1.60%	2.50%	2.50%	2.30%	6.40%

Figure 20. Domestic tourists origin

Figure 19 identifies the top 5 origin of international visitors for each LGA in the Mid North Coast.

	Port Macquarie	Nambucca	Kempsey	Taree	Coffs Harbour	Bellingen
1	United Kingdom	United Kingdom	United Kingdom	United Kingdom	United Kingdom	United Kingdom
2	Germany	New Zealand	New Zealand	New Zealand	Germany	Germany
3	New Zealand	USA	USA	USA	New Zealand	New Zealand
4	USA	Germany	Scandinavia	Canada	Canada	Netherlands
5	Canada	Switzerland	Germany	Netherlands	USA	USA

Figure 21. International tourists origin

For statistical information regarding the origin of international visitors please visit: www.destinationnsw.com.au

33 Retrieved from National visitor Survey and International Visitor Survey Sep 2008-Sep 2011 Tourism Research Australia www.destinationnsw.com.au

Age of visitors[34]

	Port Macquarie		Nambucca		Kempsey		Taree		Coffs Harbour		Bellingen		NSW	
	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.	Domestic	Internat.
15 to 24 years	13.30%	29.90%	8.20%	19.60%	12.40%	28.30%	14.20%	14.70%	13.10%	33.40%	9.50%	24.50%	14.50%	18.80%
25 to 34 years	11.80%	28.80%	14.30%	26.40%	11.30%	30.40%	12.40%	19.80%	13.70%	28.60%	11.70%	23.20%	14%	24.80%
35 to 44 years	18.40%	10.30%	13.30%	12.70%	18.80%	10.60%	20.10%	14%	20.20%	9.30%	13.60%	13.30%	21.50%	17.40%
45 to 54 years	17.60%	11.30%	23.70%	13%	17.80%	10.30%	15.20%	18.40%	18.60%	7.90%	18.30%	17.20%	19%	17.20%
55 to 64 years	19.30%	12.40%	17.80%	19.20%	21.30%	11.90%	19.80%	20.40%	17.50%	12.90%	22.30%	16.20%	16.60%	14.80%
65 years and over	19.50%	7.30%	22.50%	n/a	18.60%	8.60%	18.30%	12.70%	16.90%	7.80%	24%	n/a	14.40%	6.90%

Figure 22. Age of visitors to Mid North Coast

Visitor average expenditure profile[35]

	Domestic Day	Domestic overnight	International
Average stay (nights)		4.0	7.0
Average spend per trip ($)	117	538	414
Average spend per night ($)		141	63

Figure 23. Visitor average expenditure

34 Retrieved from National visitor Survey and International Visitor Survey Sep 2008-Sep 2011 Tourism Research Australia www.destinationnsw.com.au

35 REMPLAN v3, using ABS 2011-12 Tourism Satellite Account

Tourism snapshot - Lord Howe Island[36]

Lord Howe Island is a remnant of a now-extinct shield volcano, dating back 7 million years and has been eroded to one-fortieth its original size and has been settled since the mid 1800s.

- The island has recorded 241 species of indigenous plants of which 113 (47%) are found nowhere else in the world. Lord Howe hosts four species of palms, the most famous of which is the Kentia Palm.
- 207 different bird species have been recorded on the Lord Howe, 32 of which breed on the island, including the endangered Woodhen. A further fifteen bird species are regular visitors to Lord Howe.
- Lord Howe is also reputed to have more seabird species breeding in higher numbers than anywhere else in Australia.
- More than 1,600 terrestrial insect species have been recorded, of which approximately 60% are found nowhere else in the world.
- One of the most spectacular insects is the Lord Howe Island Phasmid, a large stick insect – thought to be extinct, but rediscovered in recent years on Balls Pyramid.
- Over 500 species of fish and 90 different coral species.

Lord Howe's underwater world is equally rich and diverse, with new species being regularly discovered. The island's waters play host to In 1982, The Lord Howe Island Group was listed as a UNESCO World Heritage property, in recognition of the global significance of the island's beauty and biodiversity.

The Lord Howe Island Group World Heritage Property now includes the main island, offshore islets and Balls Pyramid, totalling about 1,455 hectares of land. A further 145,000 hectares of marine environment are included in the World Heritage Area.

36 Retrieved from www.lordhowe.info 23rd May 2013

Airport infrastructure

- A package of $17 million has been allocated to support the Mid-North Coast Aviation Plan (Taree, Kempsey, Port Macquarie) with an overall cost of $20.45 million.[37]
- From 2004-2010 passenger numbers at Port Macquarie Airport doubled to over 200,000.[38]
- Regional population forecasts and high growth ratios of population to passenger movements estimate that annual RPT passenger movements at Port Macquarie Airport could reach in the order of 450,000 passengers per annum by 2030.[36]
- According to Total Travel it is estimated around 20,000 people utilise Taree airport each year.[39]
- Currently 380,000 people access Coffs Harbour airport however in 2013-2014 tourist movements are predicted to be an estimated 420,000.[40]

Hospital infrastructure[41]

- The Mid North Coast Local Heath District has provided the following figures which identifies the amount of budgeted spending on hospital infrastructure in our region:
  - $100M Port Macquarie
  - $80M Kempsey
  - $5M Bellingen
  - $10M Coffs Harbour
  - $3M Wauchope.

37 Australian Treasury, 2013, Australian Government Federal Budget 2013
38 Retrieved from www.hastings.nsw.gov.au/www/html/690-about-port-macquarie-airport.asp
39 au.totaltravelyahoo.com/listing/871972/Australia/nsw/northcoastnsw/taree/10077026/
40 Coffs Harbour Airport Staff, 27th May 2013, personal communications
41 Mid North Coast Local Health District Email, 3 June 2013, email correspondence

Environmental

Proactive action

The electricity use on the Mid North Coast is 1600GWh per annum.[42]

Waste management on the Mid North Coast.

- 29417 tonnes of dry recycling waste, 33494 tonnes of organic waste and 41542 tonnes of residual waste, was collected across the Mid North Coast in 2010-2011.
- Per capita 12 kg of dry recycling waste, 13.5 kg of organic waste and 17.5kg of residual waste were collected in 2010/2011.

The Mid North Coast region's Agriculture, Forestry and Fishing Industry Sector had an output of $858.770 million in 2011. Figure 21 identifies the distribution of area of holdings in the Mid North Coast.

- 39% of agricultural holdings are used for grazing.
- 27% of holdings are not used for agricultural purpose.

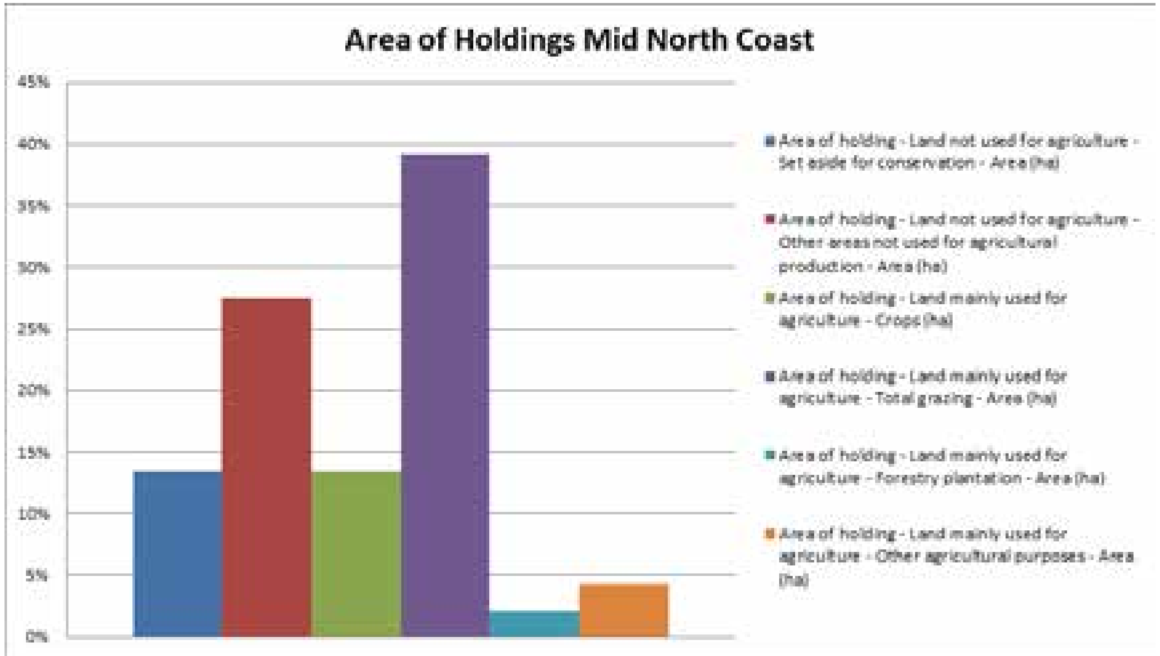

Figure 24. Area of holdings, Mid North Coast

42 Essential Energy, 30th May 2013, email correspondence

The following information has been sourced from the NSW Office of Environment and Heritage. The information provides data on climate change for the North Coast Region. The Mid North Coast is identified as part of the North Coast region. This is the latest publicised data available.

Information has been sourced from the following website. For the purpose of providing greater detail readers are encouraged to refer to this link.

http://www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf

The following information is directly taken from the website above.

Expected regional climatic changes[43]

The following climatic changes are expected to occur to 2050.

Temperatures are virtually certain to rise

- Average daily maximum temperatures are virtually certain to increase in all seasons. The smallest increases are projected to occur in summer (1.0–1.5°C) and the greatest in winter (2.0–3.0°C). Average daily minimum temperatures are projected to increase by 2.0–3.0°C in all seasons.

Rainfall is likely to increase in summer and autumn

- Spring rainfall is not expected to change. Summer and autumn rainfalls are expected to increase slightly, while winter rainfall is expected to decrease slightly. However, changes in weather patterns that cannot be resolved by the climate models mean that rainfall in coastal regions is difficult to simulate.

Increased evaporation is likely in all seasons

- Evaporation is likely to increase moderately throughout the Region during spring, summer and autumn. A slight to moderate increase in evaporation is likely in winter.

The impact of the El Niño–Southern Oscillation is likely to become more extreme

- Our current understanding of how climate change may influence major drivers of climate variability such as the ENSO phenomenon is limited (PMSEIC 2007). However, current scientific literature indicates that the pattern of climate variability associated with ENSO will continue under enhanced greenhouse conditions. This assessment assumes that the ENSO phenomenon will continue to drive climatic variability across NSW. It is noted, however, that ENSO is a weaker influence on annual average rainfall in coastal areas than in inland areas. This assessment assumes that ENSO years will continue to be drier than average but also become hotter, leading to more extreme impacts. La Nina years are likely to continue to be wetter than average but will also become warmer. In El Nino events, water stress is likely to be more intense because of higher temperatures.

43 New South Wales Office of Environment and Heritage, retrieved from www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf

Summary of temperature and rainfall changes in the North Coast region to 2050

Season	Minimum temperatures	Maximum temperatures	Precipitation	Evaporation
Spring	2.0–3.0°C warmer	1.5–2.0°C warmer	No change	10–20% increase
Summer	2.0–3.0°C warmer	1.0–1.5°C warmer	5–20% increase	10–20% increase
Autumn	2.0–3.0°C warmer	1.5–2.0°C warmer	5–10% increase	10–20% increase
Winter	2.0–3.0°C warmer	2.0–3.0°C warmer	5–10% decrease	5–20% increase

Figure 25. Summary of temperature & rainfall changes

Example – Taree

The current average daily maximum temperature in summer is 28.9°C. This is very likely to increase to between 29.9°C and 30.9°C.

The current average rainfall over summer is 348 mm. This is likely to increase to between 365 mm and 417 mm.

The current average rainfall over winter is 203 mm. This is likely to decrease to between 183 mm and 193 mm.

Figure 26. Example climate change effects, Taree

Expected physical responses[44]

Climatic changes will affect the physical environment in the following ways;

- Sea level is virtually certain to rise
- Increased evaporation is likely to lead to drier conditions for most of the year
- Average annual run-off will about as likely as not increase slightly as a result of substantial increases in summer run-off
- Short-term hydrological droughts are likely to become more severe
- Flooding behaviour is likely to change
- Fire regimes are likely to change, but changes to fuel availability are uncertain

Regionally significant impacts

- Rising sea level is virtually certain to increase coastal recession
- Wind erosion is likely to continue on coastal dunes
- Saline incursion into subsoils is likely on the coastal plains
- Higher rainfall is likely to increase sheet and rill erosion, leading to increased sedimentation of coastal floodplains
- Gully erosion is likely to decrease, and mass movement of soil to increase in localised areas
- Problems of acid sulfate soils are likely to continue in the short term but reduce over the longer term
- Organic matter in soils is likely to increase in most areas, but decline in some coastal swamps
- Sea level rise and changes to soils are likely to have implications for agriculture
- Sea level rise and flooding are likely to affect Aboriginal cultural heritage value
- Community assets, residential property and associated infrastructure are virtually certain to be threatened by coastal inundation and recession
- Most property boundaries referenced to the high water mark will change
- Urban streams are likely to flood more frequently
- Sea level rise is virtually certain to exacerbate flooding on the coast
- Some levees are likely to become less effective at protecting property from floods
- Water supplies and sewerage infrastructure are at risk
- Sea level rise is likely to alter estuarine communities
- Some fish species are likely to decline
- Habitat loss and alteration are likely to impact on shorebirds
- Sea level rise is likely to alter ecosystems on shores and coastal lowlands
- Higher temperatures, altered hydrology and altered fire regimes are likely to cause major changes
- High-altitude ecosystems are likely to change or contract
- Altered fire regimes are likely to cause changes in wetter ecosystems
- Fragmented and degraded ecosystems are likely to have poor adaptation potential
- More subtle but widespread changes are likely for more resistant ecosystems

To understand these expected responses to these changes and overall regional impacts please refer to this link; *http://www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf*

44 New South Wales Office of Environment and Heritage, retrieved from www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf

The following information has been sourced from the NSW Office of Environment and Heritage. The information provides data and explanatory notes outlining NSW greenhouse emissions in 2010. This is that latest publicised data available. Although data is reflective of NSW emissions, the context it provides is of relevance to the Mid North Coast.

Information has been sourced from the following website. For the purpose of providing greater detail readers are encouraged to refer to this link.

http://www.environment.nsw.gov.au/climatechange/emissionsoverview.htm

The following information is directly taken from the website above.

NSW emissions[45]

Estimates of Australia's greenhouse gas emissions are produced by the Australian Department of Climate Change and Energy Efficiency. NSW emissions in 2010 (the latest year of data) were 157 million tonnes CO2e, with stationary energy (generating heat and electricity) the largest contributing sector. NSW emissions represent 28 per cent of Australia's total emissions while NSW is home to around one third of Australia's population, and one third of national gross domestic product.

Over three quarters of NSW emissions come from the extraction, processing and burning of fossil fuels, primarily coal. Nearly three quarters of emissions are in the form of carbon dioxide, with methane emissions the next largest form of emissions.

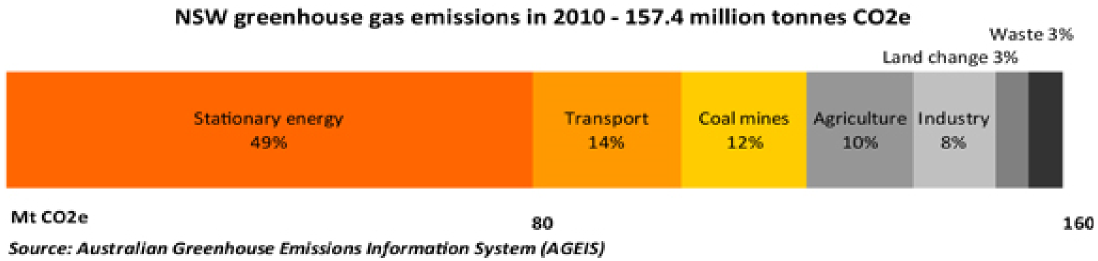

Figure 27. NSW greenhouse gas emissions

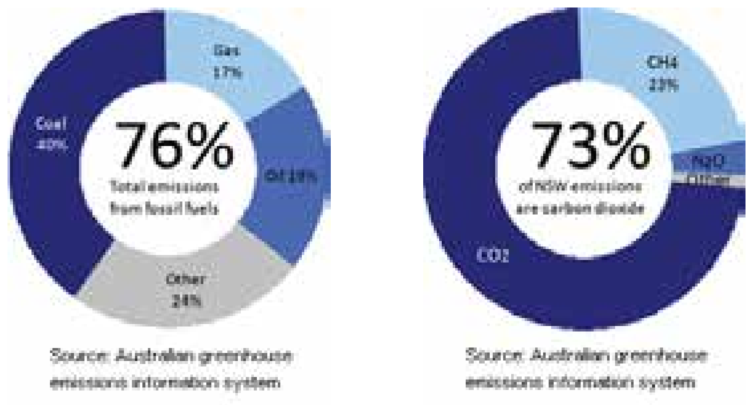

Figure 28. Breakdown NSW emissions

45 New South Wales Office of Environment and Heritage, retrieved from www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf

Trends in emissions[46]

NSW emissions are lower now than in 1990 due mainly to a reduction in the rate of land clearing. In the fossil fuel burning sectors, emissions have grown by 27 per cent since 1990, including a 33 per cent increase in emissions from electricity generation.

NSW greenhouse gas emissions and trends[44]

Stationary Energy - 79 million tonnes (49% of total emissions)

Nearly half of all NSW emissions in 2010 were from the stationary energy sector, primarily from public electricity production. Emissions in the sector grew steadily from 1990 to 2008. However since 2009 emissions in the stationary energy sector have decreased by 2% per annum as a result of reduced demand due to the global financial crisis and energy efficiency improvements and from increased electricity generation from lower emissions sources such as renewable energy and gas powered generation.

Burning fossil fuels accounts for over 99% of emissions in the sector. Coal combustion alone produces 62 million tonnes of emissions annually or nearly 40 per cent of all NSW greenhouse gas emissions.

Although emissions have declined due to the global financial crisis and an increase in gas fired generation, demand for electricity is forecast to continue to grow by about 1.2 per cent annually to 2020 and beyond.

Transport - 22 million tonnes (14% of total emissions)

Transport emissions are currently the second largest component of NSW greenhouse gas emissions.

The major source of transport emissions is road transport which accounts for 90% of all NSW transport emissions. This reflects the importance of motor vehicles for both passenger and freight transport within the state.

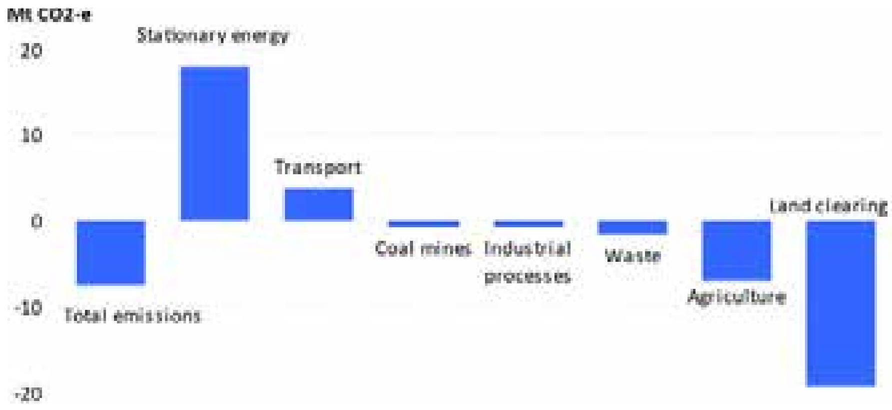

Figure 29. Change in emissions

Since 1990 emissions have increased by 3.7 Mt but have remained relatively stable since 2000.

Fugitive emissions - 19 million tonnes (12% of total emissions)

The fugitive emissions sector includes emissions from coal mining and oil & gas recovery, transport and storage. Fugitive emissions in NSW are dominated by emissions from coal mining (96% of all fugitive emissions).

Most fugitive emissions in NSW come from underground (11.5 Mt) and surface (5.7 Mt) coal mines.

Fugitive emissions are growing strongly. Since 2003, fugitive emissions have grown on average 4% per annum driven by increased demand for coal and expanding mine production.

NSW coal mine production is forecast to grow strongly over the next decade. Fugitive emissions from coal mining are likely to increase by more than 50% by 2020.

46 New South Wales Office of Environment and Heritage, retrieved from www.environment.nsw.gov.au/resources/climatechange/10171Ch5RegionNorthCoast.pdf

Industrial processes - 12 million tonnes (8% of total emissions)

Emissions accounted for in the industrial processes category include a variety of primarily chemical processes involved in industrial production from a wide range of industries including: iron and steel; cement clinker; lime production; limestone and dolomite use; chemical manufacturing and aluminium production.

Industrial process emissions have fallen by 5 per cent since 2000.

Agriculture - 16 million tonnes (10% of total emissions)

The primary source of agricultural emissions is methane produced as cows and sheep digest their food, known as enteric fermentation. These emissions account for three quarters of all NSW agricultural emissions (12 Mt).

Emissions from agriculture have fallen by 31% since 1990. Since 2000, agricultural emissions have declined on average by over 3% per annum as a result of declining production associated with prolonged drought conditions across much of the state. For example sheep numbers have fallen by over 40% since 2000.

To 2020 agricultural emissions are forecast to either remain stable or increase slightly as livestock numbers recover from the prolonged drought conditions

Waste - 5 million tonnes (3% of total emissions)

Waste emissions are divided into solid waste disposal on land (landfills), which accounts for most waste emissions (4.2 Mt), and wastewater handling (sewage treatment).

Since 1990 emissions from waste have decreased by nearly a quarter as increased waste associated with growing populations and industrial production have been offset by higher recycling rates and methane recovery at landfills.

Land use change and forestry - 5 million tonnes (3% of total emissions)

Emissions from land clearing and forestry combine emissions from deforestation with carbon sequestered from reforestation activities.

Emissions from land clearing have fallen dramatically since 1990. In 1990 over 25 million tonnes of greenhouse gases were emitted because of land clearing. Since then changes to the management of land clearing have reduced land clearing emissions by over 70 per cent.

At the same time forest plantings for carbon sequestration projects have emerged as a new industry capable of helping NSW reduce our total greenhouse gas emissions. In 2010 alone over 3 million tonnes of greenhouse gases were sequestered in NSW forestry projects.

Note that estimates of emissions from land use change and forestry relies on detailed modelling based on satellite observations and has much greater uncertainties than emissions estimates from all other sectors.

How does NSW compare with the rest of the world?

NSW annual emissions per capita are around 23 tonnes CO_2e. In the UK, Germany and Japan, annual emissions per capita are around 10 tonnes and the average for industrialised nations is about 13 tonnes per person.

Australia's comparatively high per capita emissions are due to our relative abundance of cheap fossil fuels, high dependence on coal-fired power generation and the emissions intensity of our exports (such as aluminium, steel and coal).

Social / Cultural

Urban growth pressures [47]

The Mid North Coast has a steady growth rate per annum that is slightly higher than the NSW average. Population growth is predicted to continue to increase at a rate of between 1.2%-1.4% per annum up until 2025. Figure 27 identifies the current and predicted future growth of the Mid North Coast population.

Population and urban growth challenges are present in the Region. The current overcrowding of houses in the Region exemplifies this issue.

- There are 105 households in the Mid North Coast where more than 3 people are living in a one bedroom dwelling.
- 17.8% of these households are found in Coffs Harbour.
- Kempsey has 52 dwellings where 5 people or more are living in a 2 bedroom household.

Total Population											
LGA	2009	2010	Growth Rate p.a.	2011	Growth Rate p.a.	2015	Growth Rate p.a.	2020	Growth Rate p.a.	2025	Growth Rate p.a.
Bellingen	13,355	13,427	0.5%	13,490	0.5%	13,672	0.3%	13,997	0.5%	14,235	0.3%
Coffs Harbour	71,605	72,700	1.5%	73,296	0.8%	78,143	1.7%	83,870	1.5%	89,344	1.3%
Taree	48,454	48,870	0.9%	49,453	1.2%	49,855	0.2%	51,258	0.6%	52,373	0.4%
Kempsey	29,301	29,391	0.3%	29,581	0.6%	30,023	0.4%	30,713	0.5%	31,218	0.3%
Nambucca	19,166	19,335	0.9%	19,416	0.4%	19,820	0.5%	20,388	0.6%	20,855	0.5%
Port Macquarie	75,028	76,190	1.5%	77,045	1.1%	82961	1.9%	89,445	1.6%	95,584	1.4%
Lord Howe	400	400	0.0%	401	0.3%	400	-0.1%	400	0.0%	400	0.0%
MNC	257,309	260,313	1.2%	262,682	0.9%	274,874	1.2%	290,071	1.4%	304,009	1.2%
NSW	7,041,760	7,121,298	1.1%	7,201,613	1.1%	7,523,157	1.1%	7,925,029	1.1%	8,318,362	1.0%

Figure 30. Population growth, Mid North Coast

47 NSW Department of Planning and Infrastructure, 2010, Local Government Area (LGA) population projections: 2010 interim revision

The Mid North Coast has a higher proportion of its population living alone or in a two person household.[48] Figure 28 outlines the comparison between Mid North Coast and NSW numbers of persons per dwelling.

The high proportion of one and two persons living arrangements on the Mid North Coast has implications on the amount of houses that are needed in proportion to the Region's population.

- The high proportion (11.53%) of persons living alone or with another person (30.83%) is a reflection of the high percentage of elderly persons living on the Mid North Coast.

New South Wales (State) (2011)			Mid North Coast RDA (2011)		
Residents	People	%	Residents	People	%
One person	641,786	9.23%	One person	28,660	11.53%
Two persons	1,632,371	23.47%	Two persons	76,654	30.83%
Three persons	1,177,271	16.93%	Three persons	37,742	15.18%
Four persons	1,546,746	22.24%	Four persons	43,686	17.57%
Five persons	871,065	12.52%	Five persons	25,778	10.37%
Six persons	378,303	5.44%	Six persons	10,909	4.39%
Seven persons	109,945	1.58%	Seven persons	3,387	1.36%
Eight or more persons	85,731	1.23%	Eight or more persons	2,404	0.97%
Not applicable	512,000	7.36%	Not applicable	19,378	7.79%
Total	6,955,218		Total	248,598	

Figure 31. Residents per dwelling comparisons

48 Australian Bureau of Statistics (ABS), 2011 Census of Population and Housing

The distribution of persons living in a single dwelling is reflective of the Persons in Family numbers for the Region. Figure 29 identifies the Persons in Family on the Mid North Coast for 2011.[49]

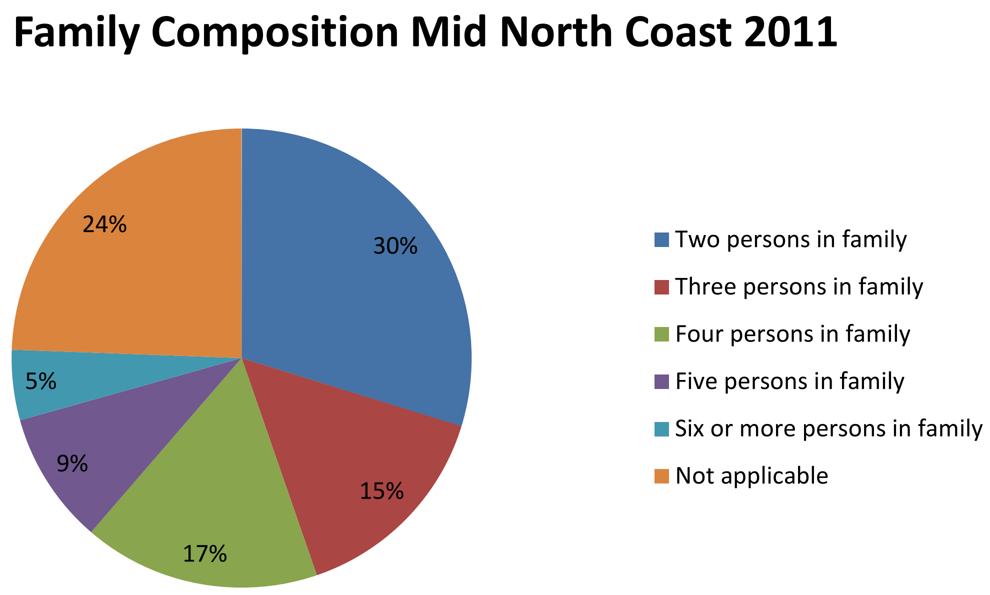

Figure 32. Family composition, Mid North Coast

49 Australian Bureau of Statistics (ABS), 2011 Census of Population and Housing

NBN fixed wireless and satellite[50]

- The NBN roll out will reach 100% of Australians through fibre (93%), fixed wireless or satellite (remaining 7%).
- The NBN fibre roll-out is underway or has been completed in Coffs Harbour, Taree and Sawtell. Three further local government areas have recently been announced – Nambucca, Belligen and Kempsey.
- In addition to the fixed fibre roll-out already completed, underway and pending there will be:
  - Some 59,525 residents in the Mid North Coast region who will have access to fixed wireless. This represents 24.1% of the Region's population and 23.2% of all dwellings. This is a significant number compared with the national rollout where around 7% of dwellings will receive wireless/satellite technologies.
- The increased access to high speed broadband in the Region, in a relative short time period, will assist in reducing the number of homes in the Region with no internet connection. This is currently 26.8% of dwellings compared with NSW figures of 20.1%. *RDA MNC 2013.*

Internet connection on the Mid North Coast

The Mid North Coast has had a growth in households who now have internet connection since 2006. Figure 30 outlines the current state of internet connections on the Mid North Coast.

- In 2006 34.5% of households on the Mid North Coast did not have an internet connection. This has decreased to 18.84% in 2011.
- 31.4% of households had a broadband internet connection in 2006 and this has increased to 65.9% in 2011.
- Dial up connection has decreased dramatically since 2006 from 25.7% to 3.06% in 2011.

Mid North Coast RDA (2011)		
Connection	**People**	**%**
No Internet connection	46,837	18.84%
Broadband connection	164,060	65.99%
Dial-up connection	7,613	3.06%
Other connection	8,023	3.23%
Not stated	13,271	5.34%
Not applicable	8,793	3.54%
Total	**248,597**	

Figure 33. Internet connection on the Mid North Coast

50 Australian Bureau of Statistics (ABS), 2011 Census of Population and Housing

Cultural diversity[51]

The Mid North Coast had 35,172 persons migrating to the area from places outside of Australia in 2011. Figure 31 identifies the breakdown of the different migration regions.

- The largest proportion of migration to the Region is occurring from persons previously living in North-West Europe.
- The total number of migrants in the Region represents 14. 2% of the total Mid North Coast Population. Migrants make up 28.9% of NSW.

Mid North Coast RDA (2011) LGAs		
Birthplace	**People**	**%**
Oceania and Antarctica	211,780	85.76%
North-West Europe	14,480	5.86%
Southern and Eastern Europe	1,494	0.60%
North Africa and the Middle East	520	0.21%
South-East Asia	1,475	0.60%
North-East Asia	679	0.27%
Southern and Central Asia	1,076	0.44%
Americas	1,245	0.50%
Sub-Saharan Africa	1,335	0.54%
Supplementary Codes	12,868	5.21%
Total	**246,952**	

Figure 34. Migration to the Mid North Coast 2011

Mid North Coast RDA (2011) LGAs		
Indicator	**People**	**%**
Same as in 2011	131,067	52.72 %
Elsewhere in Australia	85,625	34.44 %
Overseas in 2006	3,704	1.49 %
Not stated	12,805	5.15 %
Not applicable	14,391	5.79 %
Overseas visitor	1,008	0.41 %
Total	**248,600**	

Figure 35. Migration - Mid North Coast distribution

- There is a much higher proportion of migrants (34.44%) moving to the Mid North Coast from elsewhere in Australia compared with overseas migrants (1.49%).

There is an emerging shift in the ethnic profile of Coffs Harbour, which was evident in the 2011 Census. The Top 5 birthplaces (highest growth rates in population between 2006 and 2011) of migrants are: Central & West Africa, Mainland South-East Asia, Southern and East Africa, Southern Asia and Chinese Asia. The combined population for these birthplaces has doubled from '06 to '11 (919 to 1,851) in Coffs Harbour.

51 Australian Bureau of Statistics (ABS), 2006 and 2011 Census of Population and Housing

Cultural infrastructure[52]

Cultural Infrastructures			
LGA	Small (100 + capacity)	Medium (200+ capacity)	Large 500+ capacity)
Coffs Harbour	8	1	2
Bellingen	6	2	
Nambucca	5	1	
Kempsey	4	2	
Port Macquarie Hastings	6	2	1
Greater Taree	2	1	1

Figure 36. Cultural infrastructure, Mid North Coast

Figure 33 identifies the cultural infrastructure available in the Region excluding privately operated/commercial facilities, clubs, hotels etc. Further acknowledgment should be considered for school halls, churches and showground facilities which can often be used for as cultural venues.

- Arts Mid North Coast identifies that the Region suffers from having a lack of medium to large performance spaces.
- In particular Coffs Harbour has no large scale performing arts centre.
- The smaller spaces that are currently available, many of these are in need of significant repairs and or renovations.

52 Data obtained from Arts Mid North Coast May 2013

Culture and arts

Arts and Cultural Practice Activities in the Mid North Coast	
Main areas of activity	Key organisations involved in activity
Visual Arts	14
Theatre and Performance Arts	8
Music	10
Film and Digital Arts	3
Literature	3
Multi Art Form	18

Figure 37. Arts and cultural activities, Mid North Coast

Figure 34 is calculated from data available through the Region Arts and Culture Information Report (2012).

Health and ageing[53]

The median age in the Mid North Coast is 45.6 years. This above average median age has many implications for the Region. Figure 35 advises the median age for each LGA in the Mid North Coast region across time and draws a comparison with the NSW median age.

There is an imbalance in the distribution of ages in the Mid North Coast. The region has a higher proportion of older persons (50+ years) compared with younger persons. Figure 36 highlights the disparity found between the age groups and shows the significant decline in 20 to 34 year olds in the Region.

Median Age			
Area	2001	2006	2011
Port Macquarie	43	45	47
Taree	40	43	46
Bellingen	41	45	47
Coffs Harbour	39	41	43
Kempsey	40	43	45
Lord Howe	45	45	45
Nambucca	43	46	49
Mid North Coast	40.87	43.354	45.61
NSW	35	37	38

Figure 38. Median age, Mid North Coast

53 Australian Bureau of Statistics (ABS), 2001, 2006 and 2011 Census of Population and Housing

Health measures[54]

- Access to GP services (measured in terms of GP's per population) places the Mid North Coast as 7th out of the 55 RDA regions.
- The level of access to allied health (measured in terms of % of workforce employed in this sector) in the Mid North Coast is ranked 1st in Australia, out of the 55 RDA regions.
- 64.4% of the Mid North Coast population have at least one of four health risk factors (i.e. smoking, harmful use of alcohol, physical inactivity and obesity), this ranks the MNC 42nd out of the 55 RDA regions in regards to this overall health measure.

Disability measures[55]

- 4.2% of the Mid North Coast under 65 years population have a profound or severe disability, higher than the NSW rate of 2.6% and the non-metropolitan NSW rate of 3.3%.
- For the 65 and over age group, the level of profound or severe disability is just under the state result – 16.7% and 18.3% respectively.

54 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

55 Public Health Information Development Unit (PHIDU), January 2013, Social Health Atlas of Australia: NSW and ACT Data by Local Government Area

Quality of life issues[56]

OECD outlines 11 conditions known as the 'Better Life Index' that help to identify the quality of life in communities; Housing, Income, Jobs, Community, Education,Environment, Civic Engagement, Health, Life Satisfaction, Safety and Work-Life Balance.

- The Affordable Housing Project undertaken by RDA MNC in 2012 identified that housing stress is a concern in the Region. Many households are paying in excess of 30% of the total household income towards housing costs.
- The Mid North Coast median income is equal to 66.8% of the NSW state average income. This identifies that the average income in the Region is well below the state average.
- Employment on the Mid North Coast has similar rankings to industry employment in NSW. The Mid North Coast has Health Care and Retail ranked as number one and number two employers in the Region which is reflective of the state's industry employment rankings. The Mid North Coast employment rankings then have Accommodation and Food Services and Education and Training industries ranked third and fourth compared with NSW which employs a greater proportion of persons in Manufacturing.
- The Mid North Coast has a smaller proportion of persons with Bachelor and Post- Graduate qualifications compared with NSW. NSW has 3.45 % of persons with Post-Graduate qualifications and 11.38% with a Bachelor degree. The Mid North Coast has 1.08% of persons with a Post-Graduate qualification and 6.65% with a Bachelor degree. The Mid North Coast is well known for its picturesque natural environment. Access to beaches, mountains, rivers and streams is in abundance.
- The Mid North Coast region has the capability to support a greater number of civic engagement departments. The introduction of the National Broadband Network to the Region means the connection to other areas is heightened and much more accessible.
- The median age in the Mid North Coast is 7 years above that of the NSW state average and the increase in employment in the Health Sector implies that a larger proportion of the Mid North Coast population may need access to health services. The large increase in employment in the Health Sector may also have a positive effect on access to health services in the Region.
- Life satisfaction and Work-Life Balance is a large consideration for those migrating to the Region. The Mid North Coast is well known as a sea and tree change destination.

56 Australian Bureau of Statistics (ABS), 2001, 2006 and 2011 Census of Population and Housing

Crime[57]

- The MNC has a higher than state average result for the number of offences flagged as alcohol related compared with NSW (15.3% and 12.4% respectively).
- For the Mid North Coast, out of 12 selected offences (reported by the Bureau of Crime Statistics and Research), the Indigenous population comprise 28.4% of offences compared with a NSW result of 16.7%.

Crime Trends[58]

Overall, there has been a 13% increase in violent offences in the Mid North Coast for the two years to March 13.

- Coffs Harbour had 24.9% increase in violent offences.
- Kempsey had19.5% increase in violent offences.
- Nambucca had 28.7% increase in violent offences.

At a major offence level, the following are the key trends for the 2 years to March 2013 for the Mid North Coast:

Significant increase 2 years to March 2013	Significant decrease 2 years to March 2013
▪ 22.9% Assault domestic violence related ▪ 19.4% Sexual assault ▪ 6.9% Assault non-domestic violence related ▪ 6.4% Steal from dwelling	▪ 23.9% Break and enter non-dwelling ▪ 14.3% Motor vehicle theft

Figure 39. Crime trends

57 Bureau of Crime Statistics and Research (BOSCAR), NSW Recorded Crime Statistics 2008-2012, viewed 5th July 2013, www.bocsar.nsw.gov.au
58 NSW Bureau of Crime Statistics and Research (BOSCAR), March 2013, NSW Recorded Crime Statistics: Quarterly Update

Access to International, national and regional markets

Key infrastructure indicators

Indicator	Score	Rank (out of 55 RDA regions in Australia)
Aviation infrastructure (distance to and from regions business centre to nearest airport)	25.5	13th
Port infrastructure (distance to and from regions business centre to nearest port)	143.7	34th
Road infrastructure (distance from region's business centre to nearest major highway)	4.1	23rd
Rail infrastructure (distance to nearest stations/service)	10.1	18th

Figure 40. Transport infrastructure[59]

- A package of $17 million has been allocated to support the Mid North Coast Aviation Plan (Taree, Kempsey and Port Macquarie) with an overall cost of $20.45 million.
- Current upgrades to the Pacific Highway will improve transport efficiency and road safety.

59 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

Comparative advantage and business competitiveness

Regional economic strengths[60]

Diversity of the economy – The economic diversity of the Mid North Coast is rated 0.1, ranking this region the 13th most diverse economy out of the 55 RDA regions. For comparative example, the Mid North Coast economy is more diverse than the Hunter (0.15, ranked 18th) region.

- An economy with a low dominance of large employers (20+ employee) – only 2.6% of business, ranking the Mid North Coast 8th out of the 55 RDA regions.
- The expenditure on Research and Development by businesses in the region ranks the Mid North Coast 8th out of the 55 RDA regions.
- Business confidence 4th out of the 55 regions.
- Development approvals median processing days (46) ranking Mid North Coast 13th out of the 55 regions.

Comparative advantages

- The establishment of a research institute in the region - $5.9m Commonwealth funds for the Port Macquarie Hastings Council / Charles Sturt University Food, Water and Soil Research Centre.
- Technical qualifications (% working age population with Certificate or Diploma) – 41.3% (ranking Mid North Coast 2nd out of 55 RDA regions).
- School performance – Secondary (% students in top 2 bands) – 26.8%, ranking Mid North Coast 7th out of the 55 RDA regions.
- Average annual rainfall 1,450mm over the past ten years.[61]

Regional opportunities

- Domestic import replacement opportunities - The Mid North Coast imported $2.982billion from the rest of Australia during the 2011/12 financial year.[62]
- The Key industries which the Mid North Coast is importing from are;

Sector	Amount of imports provided to the MNC by the rest of Australia
Manufacturing	$1,114.867m or 27.4%
Financial & Insurance Services	$360.143m or 12.1%
Professional, Scientific & Technical Services	$270.012m or 9.1%
Transport, Postal & Warehousing	$$223.652m or 7.5%
Information Media & Telecommunications	$200.994m or 6.7%
Construction	$194.306m or 6.5%

Figure 41. Imports to MNC by sector

- The current level of the workforce with tertiary qualifications in Science and Technology is low (2.9%), ranking MNC 26th out of the 55 RDA regions. With the establishment of the Charles Sturt University campus, the expansion of tertiary offerings and the establishment of a Research Centre (Food, Water and Soil Research Centre), this will increase. This can lead to increased R&D activity, increase innovation in region, increase in patent applications, increased economic activity and exports.[63]
- Increased exporting and value-adding within the Food Product Manufacturing sector.

60 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

61 National Economics/Australian Local Government Association, 2013, State of the Regions 2013-14, Table: Temperature and Rainfall

62 REMPLAN v3, using ABS 2011 Census JTW Employment Data, 2008/09 ABS National Input Output Table, June 2012 ABS Gross State Product

63 INSIGHT, Regional Australia Institute, www.insight.regionalaustralia.org.au, viewed 5/7/13

- Opportunities to target different overseas markets to increase the average spend per night by International visitors. MNC is attracting 6.2% of total visitors within NSW but only collecting 5.5% of the total spend and the average international spend is only $63 per night.[64]

Regional arts, creative and sporting industries[65]

- The sector only currently represents 0.9% of the Mid North Coast's total output, however this has grown 9.5% over 2 years (2009/10 to the 2011/12 financial year), to $172.797m.
- There have also been considerable increases in value added by the Arts and Recreational Services sector on the Mid North Coast, increasing 26.2% over 2 years (2009/10 to the 2011/12 financial year), or $57.741m to $72.872m.

64 REMPLAN v3, using ABS 2011-12 Tourism Satellite Account

65 REMPLAN v3, using ABS 2011 Census JTW Employment Data, 2007/08 ABS National Input Output Table, June 2012 ABS Gross State Product

Figure List