



ECONOMIC
DEVELOPMENT
STRATEGY

DRAFT SUBMITTED TO COUNCIL ENDORSEMENT

CONSULTATION
SUMMARY

MARCH 2020



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1. INTRODUCTION

1.1 BACKGROUND

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

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

1.2 PURPOSE OF THIS REPORT

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

1.3 APPROACH

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

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

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

2. SUMMARY

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

2.1 STRENGTHS

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

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

2.2 CHALLENGES

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

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

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

2.3 MUST HAVES

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

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

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

2.4 KEY OPPORTUNITIES

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

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

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

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APPENDIX A: WORKSHOP 1 – EXECUTIVE LEADERSHIP TEAM

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

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

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

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APPENDIX B: WORKSHOP 2 – CENTRAL COAST COUNCILLORS

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

CHALLENGES:

Challenges identified by Councillors include:

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

STRENGTHS

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

OPPORTUNITIES

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

APPENDIX C: WORKSHOP 3 – GOSFORD FOCUS GROUP WORKSHOP

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

Table C.1. List of Attendees

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

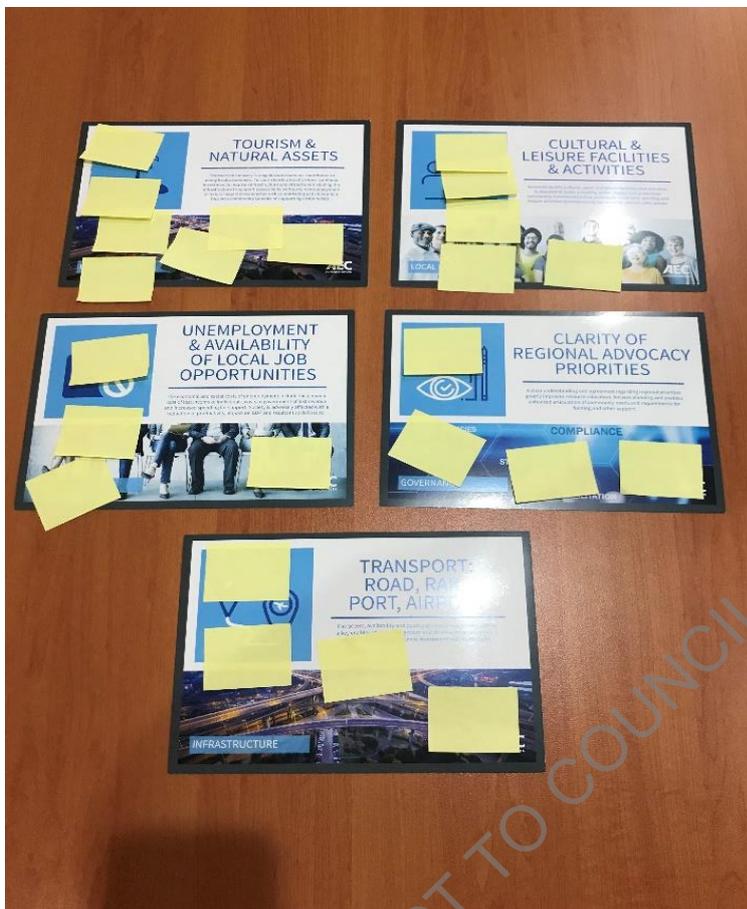
Source: AEC

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CHALLENGES

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

Figure C.1. Key Challenges Identified in the Workshop



Source: AEC

Table C.2. Challenges and Number of Votes

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

Source: AEC.

Figure C.2. All Challenges Identified in the Workshop



Source: AEC

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

Tourism and Natural Assets

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

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

Cultural and Leisure Activities

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

STRENGTHS

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

OPPORTUNITIES

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

APPENDIX D: WORKSHOP 4 – WYONG FOCUS GROUP WORKSHOP

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

Table D.1. List of Attendees

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

Source: AEC

CHALLENGES

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

Figure D.1. Key Challenges Identified by Wyong Workshop



Source: AEC

Table D.2. Challenges and Number of Votes

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

Figure D.2. All Challenges Identified by Wyong Workshop



Source: AEC

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

Transport

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

Unemployment

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

SKILLING FOR THE FUTURE

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

STRENGTHS

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

OPPORTUNITIES

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

APPENDIX E: INDIVIDUAL INTERVIEWS

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

Table E.1. Individual Interview Attendees

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

Source: AEC.

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

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

CHALLENGES

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

STRENGTHS

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

OPPORTUNITIES

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

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

APPENDIX F: CONSULTATION REPORT

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

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

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

DRAFT SUBJECT TO COUNCIL ENDORSEMENT

CENTRAL COAST ECONOMIC DEVELOPMENT STRATEGY SURVEY

HELP SHAPE OUR FUTURE



pg. 20

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

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

Your valuable feedback will influence the focus of this strategy

WHERE ARE WE NOW?

340,000
Approximate population (2017)

\$13.5 Billion
GRP (year ended June 2018)

POP X AGE:

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



139,685
WORKING LOCAL RESIDENTS (2016 census)

100,153
Jobs Central Coast

39,532
Live Central Coast and work elsewhere

44%
Residents completed high school

6%
Unemployment (2018)

14%
Bachelor's degree or higher

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

\$425 p/w
Average rent

\$646,773
Average property price



KEY INDUSTRIES BY:

 **12.4%**
Health Care and Social Assistance

 **8.2%**
Retail Trade

 **11.6%**
Construction

 **7.4%**
Financial and Insurance Services

 **8.3%**
Manufacturing

BY EMPLOYMENT:

 **18.3%**
Health Care and Social Assistance

 **9.5%**
Accommodation and Food Services

 **13.0%**
Retail Trade

 **8.6%**
Education and Training

 **10.5%**
Construction

TOURISM:

 **5 million**
Plus visitors (2018 FY)

 **4.7 million**
Visitor nights (2018 FY)

TYPE OF VISITOR:

 **69.8%**
Domestic day trippers

 **25.1%**
Interstate domestic overnight visitors

 **3.8%**
Domestic overnight interstate

 **1.3%**
International

PURPOSE OF VISIT:

 **43.6%**
Holiday

 **39.4%**
Visit friends and relatives

WHAT IS BEING DEVELOPED?

An economic development vision to 2040

Where do we want to be in 2040?

HOW WILL WE GET THERE?

?

What are the competitive advantages that set the Central Coast region apart?

?

What are the challenges holding the Central Coast region back that, if addressed, could be game changers for the region in terms of growth and regional development business and jobs growth?

?

What are the core strategic assets that should be leveraged for business, industry, investment and jobs growth?

?

What are the core opportunities to drive jobs growth and investment in the Central Coast area over the next:

3 - 5 YEARS

>

5 - 10 YEARS

>

LONGER TERM

Want to know more?

email: projectdevelop@centralcoast.nsw.gov.au

Online survey questions

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

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

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

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

About the survey

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

Next

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Online survey questions

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

Please select a single response

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



Next

Q1.2. What is your residential suburb?

Please choose from drop down list below.

-- Select --

- Prefer to not answer
- Other (please specify)



Next

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Online survey questions

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

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

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



Next

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

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

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



Next

Online survey questions

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

Opportunities for Youth -- Select --

Lack of leisure and entertainment facilities/ activities/ events -- Select --

Road infrastructure – ease of movement within the region -- Select --

Lack of local job opportunities – forced commuting to Sydney/ Newcastle -- Select --

Transport & Access – Road, Rail, Water, Air -- Select --

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



Next

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

Professional Services – e.g. finance, legal, accounting, architects, engineers -- Select --

Advanced Manufacturing - e.g. food technology, precision engineering, 3D printing -- Select --

Transport, logistics and warehousing -- Select --

Knowledge Industries – e.g. research and development, digital technologies -- Select --

Health Sector – hospital, medical and allied health services – government and private sector -- Select --

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



Next

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Online survey questions

Note: Question 6 is a free text box

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

1.

2.

3.

Don't know/unsure

Prefer to not answer



Next

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

1.

2.

3.

Don't know/unsure

Prefer to not answer



Done

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CENTRAL COAST COUNCIL MARKET RESEARCH

INSIGHTS INTO STAFF AND COMMUNITY PERCEPTIONS

DRAFT SUBJECT TO COUNCIL ENDORSEMENT

CENTRAL COAST COUNCIL

MAY 2019



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PROJECT OBJECTIVES

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

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

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

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

- **Identifying** key strengths and opportunities for the area
- **Understanding** main challenges facing the region
- **Exploring** main businesses, industries, and jobs to build the future economy of the region
- **Exploring** ideas for the ideal future vision of the region

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

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

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

SURVEY DESIGN

COMMUNITY AND STAFF SAMPLING

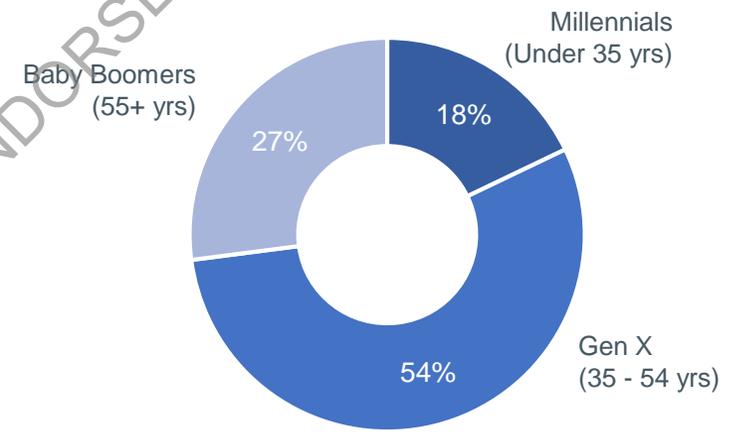
A quantitative online survey methodology was engaged with the community and staff. A total of n=74 staff and n=211 survey were obtained via the online survey.

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

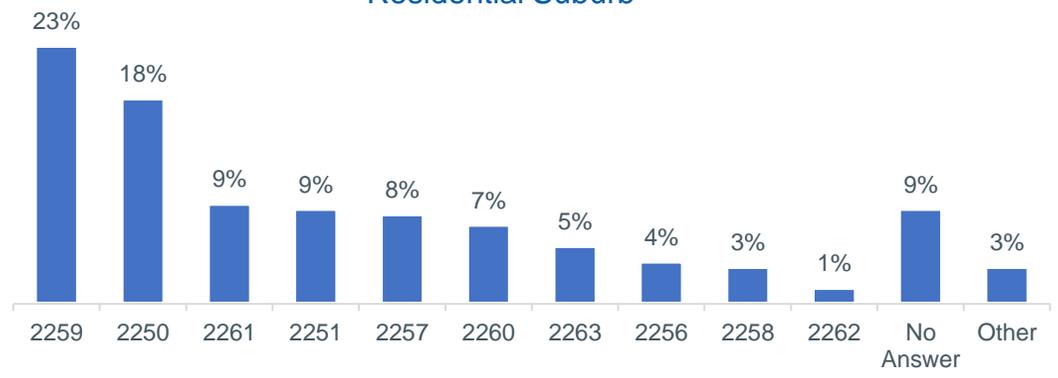
A 5 minute questionnaire was utilised, with fieldwork completed between April and May 2019.

COMMUNITY SAMPLE

Age



Residential Suburb



STRATEGIC INSIGHTS SUMMARY

Key Strengths and Main Challenges

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

Opportunities and Future Vision

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

COMMUNITY FINDINGS

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

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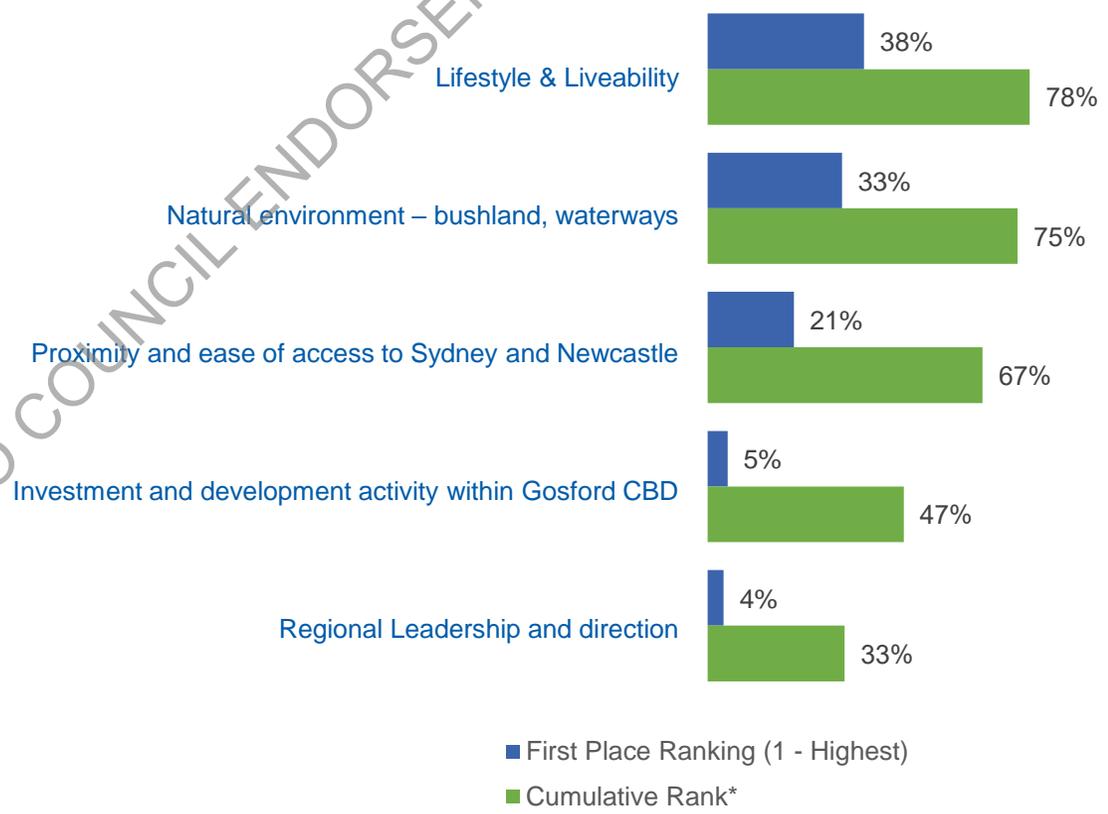
LIFESTYLE AND LIVEABILITY – KEY STRENGTHS FOR THE REGION

KEY STRENGTHS FOR THE REGION

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

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

Key Strengths – Attribute Ranking



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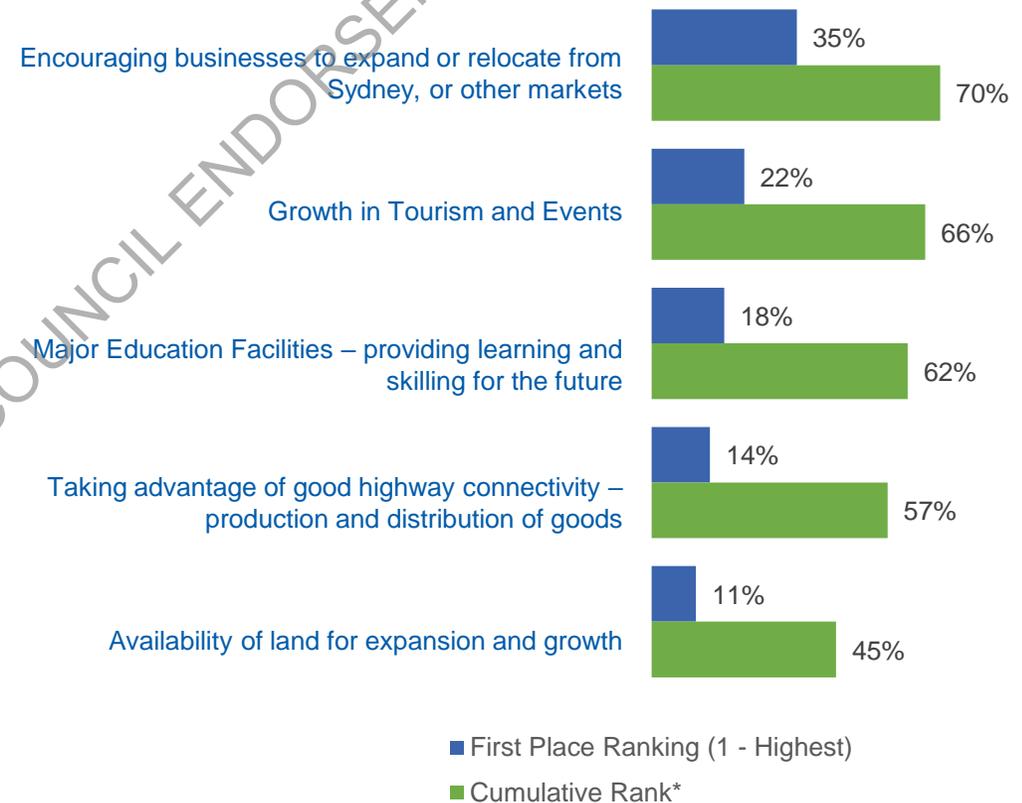
EXPANDING AND/OR ATTRACTING MORE BUSINESSES NOMINATED AS THE KEY OPPORTUNITY FOR THE REGION

KEY OPPORTUNITIES FOR THE REGION

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

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

Key Opportunities – Attribute Ranking



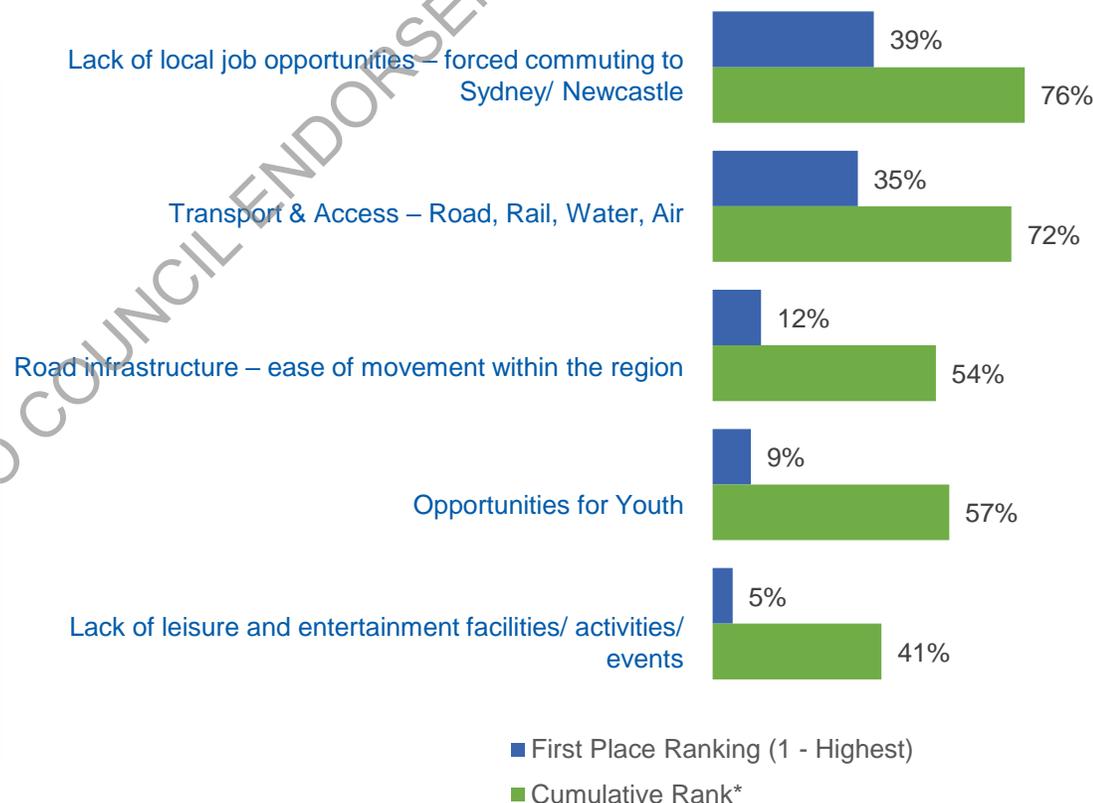
LACK OF JOB OPPORTUNITIES FOLLOWED CLOSELY BY TRANSPORT AND ACCESS MAIN CHALLENGES FOR THE REGION

MAIN CHALLENGES FOR THE REGION

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

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

Main Challenges – Attribute Ranking

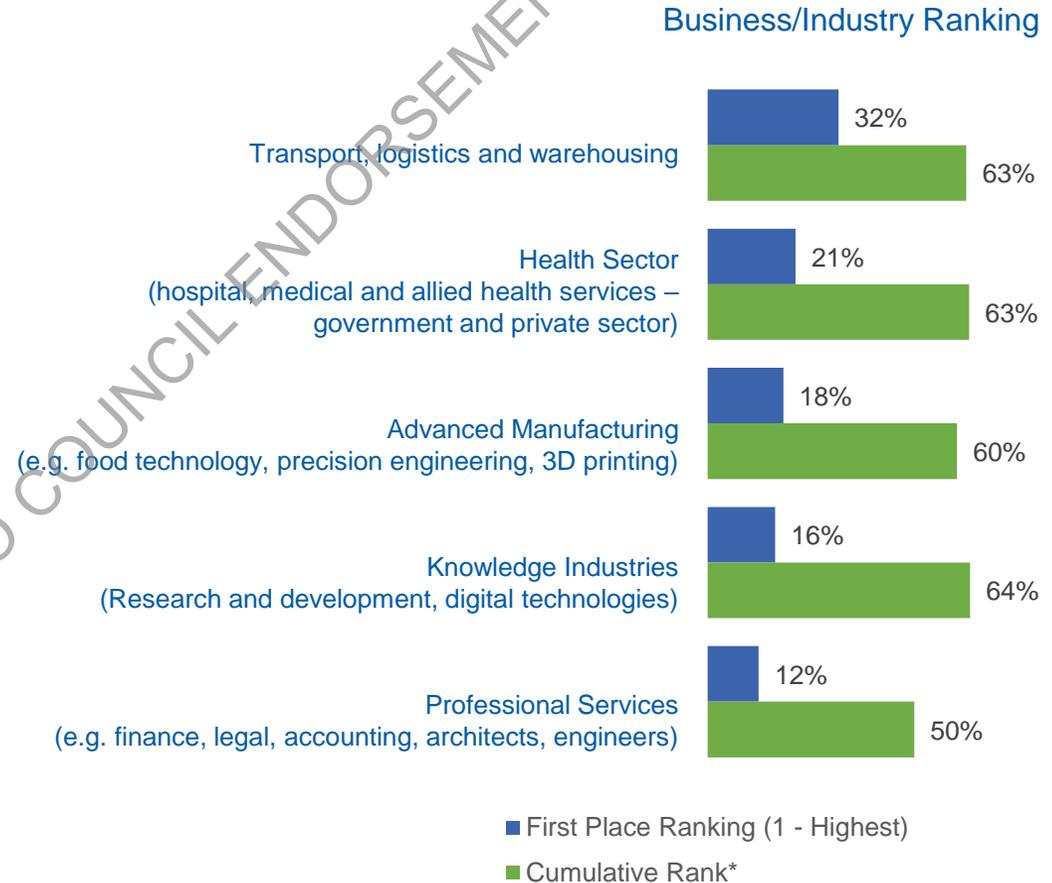


TRANSPORT, LOGISTICS AND WAREHOUSING INDUSTRY IS THE BEST SUITED TO BUILD FUTURE ECONOMY

INDUSTRIES BEST SUITED TO BUILD FUTURE ECONOMY

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

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



STAFF FINDINGS

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

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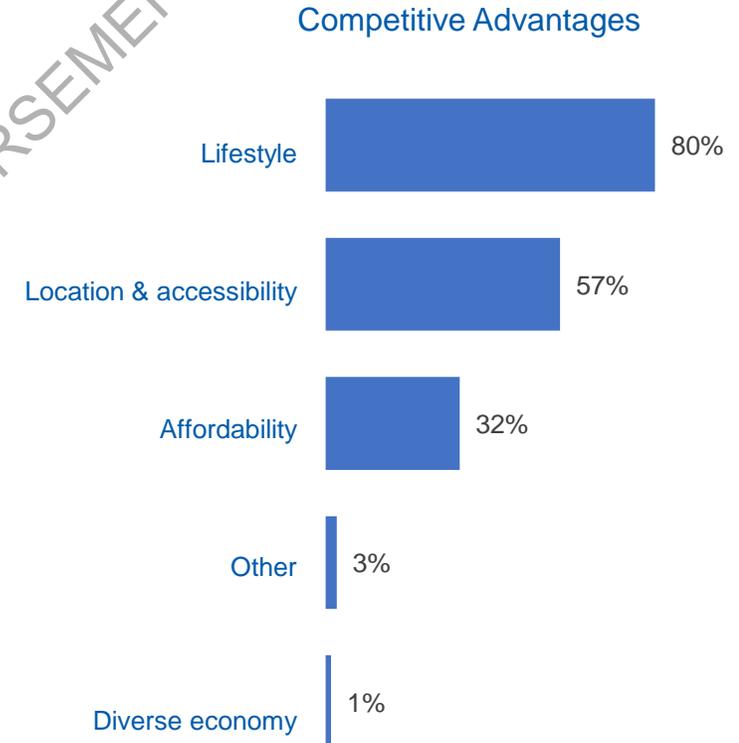


LIFESTYLE TOPS THE LIST AS THE KEY COMPETITIVE ADVANTAGE FOR THE REGION

COMPETITIVE ADVANTAGES

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

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



MAJOR ROAD NETWORK CONNECTIVITY – A STRATEGIC ASSET TO BE LEVERAGED

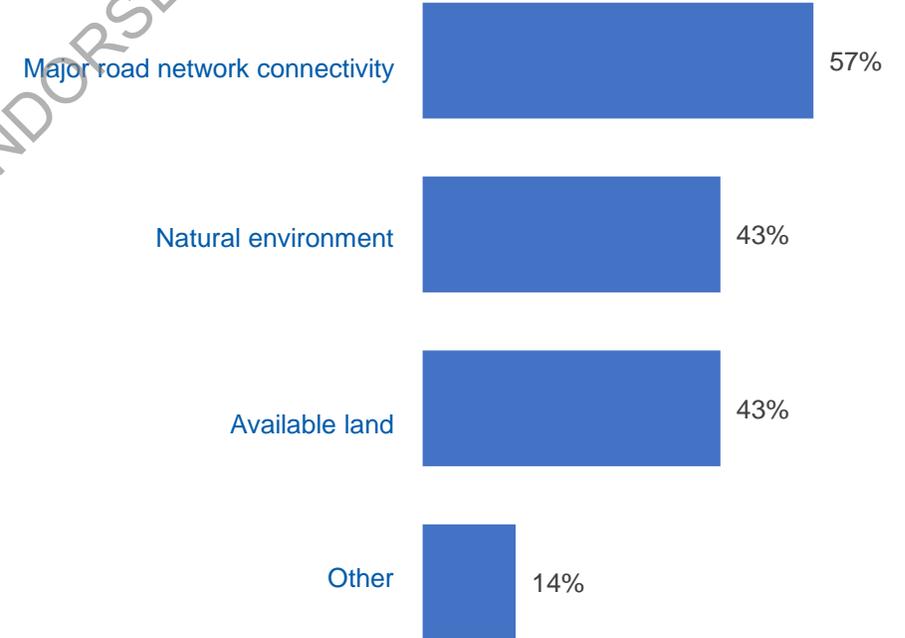
STRATEGIC ASSETS

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

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

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Strategic Assets



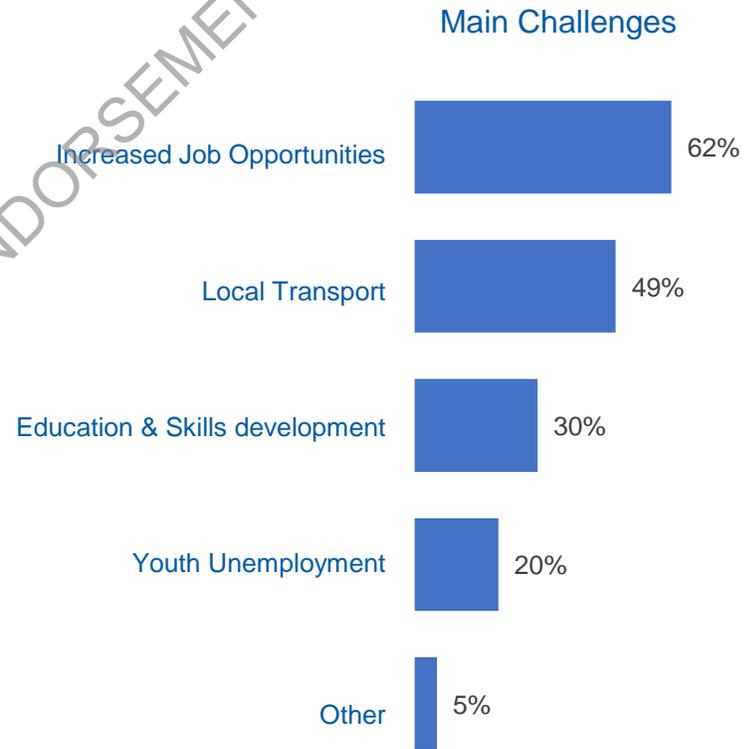
INCREASED JOB OPPORTUNITIES IS THE MAIN CHALLENGE

MAIN CHALLENGES

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

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

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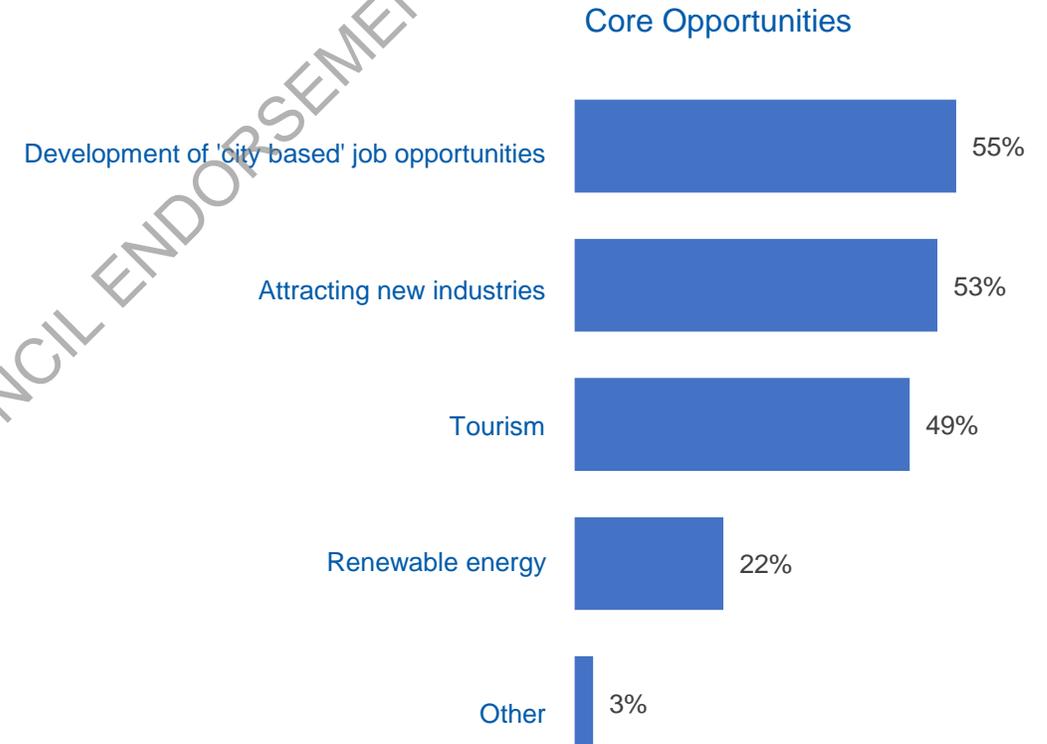


INCREASED JOB OPPORTUNITIES MAIN CHALLENGE AS WELL AS THE CORE OPPORTUNITY

CORE OPPORTUNITIES

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

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



APPENDIX G: FIRST DRAFT ECONOMIC DEVELOPMENT STRATEGY ENGAGEMENT



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

Table G1: List of Attendees

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

Two Central Coast Round Table Discussion on 26 November 2019 9:30am and 4 February 2020 at 9.00am. A list of attendees can be found in the table below.

Table G2: List of Attendees

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

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