

**Submission
No 46**

**INQUIRY INTO ECONOMIC AND SOCIAL DEVELOPMENT
IN CENTRAL WESTERN NEW SOUTH WALES**

Organisation: Dubbo City Council

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5 September 2011

ATTENTION: MR R COLLESS

The Chair
Standing Committee on State Development NSW Legislative Council
Parliament House
Macquarie Street
SYDNEY NSW 2000



Dear Mr Colless

INQUIRY INTO ECONOMIC AND SOCIAL DEVELOPMENT IN CENTRAL WEST NSW

Thank you for the opportunity to make a submission to this very important enquiry.

With a population of 40,306 Dubbo is the largest City in the Orana Region and is a major regional service centre in the Orana Region. Dubbo provides a range of community, industry and business services to the region; which extends well outside the borders of the Dubbo Local Government Area.

Given the role of Dubbo as a regional service centre, Council is committed to ensuring that economic growth occurs in a manner that maintains the social services provided to both the Dubbo community and the broader catchment which is in order of some 120,000 people.

To this end Dubbo City Council places a high focus on its strategic planning. Most recently Council has prepared a draft Economic Development Strategy that aims to deliver more regionally focused initiatives to grow the City and support the region. A copy of the draft Strategy and Economic Profile is attached for the consideration of the Standing Committee.

It is Council's firm view that growth however cannot be the sole responsibility of Local Government and would call upon both State and Federal Government to develop strategic plans for the Central West to ensure growth, support areas in decline in a more cost effective manner and provide infrastructure to enable larger centres to support their regional catchments.

Council would welcome the opportunity to address the Standing Committee to discuss this very important issue.

Submitted for the consideration of the Standing Committee.

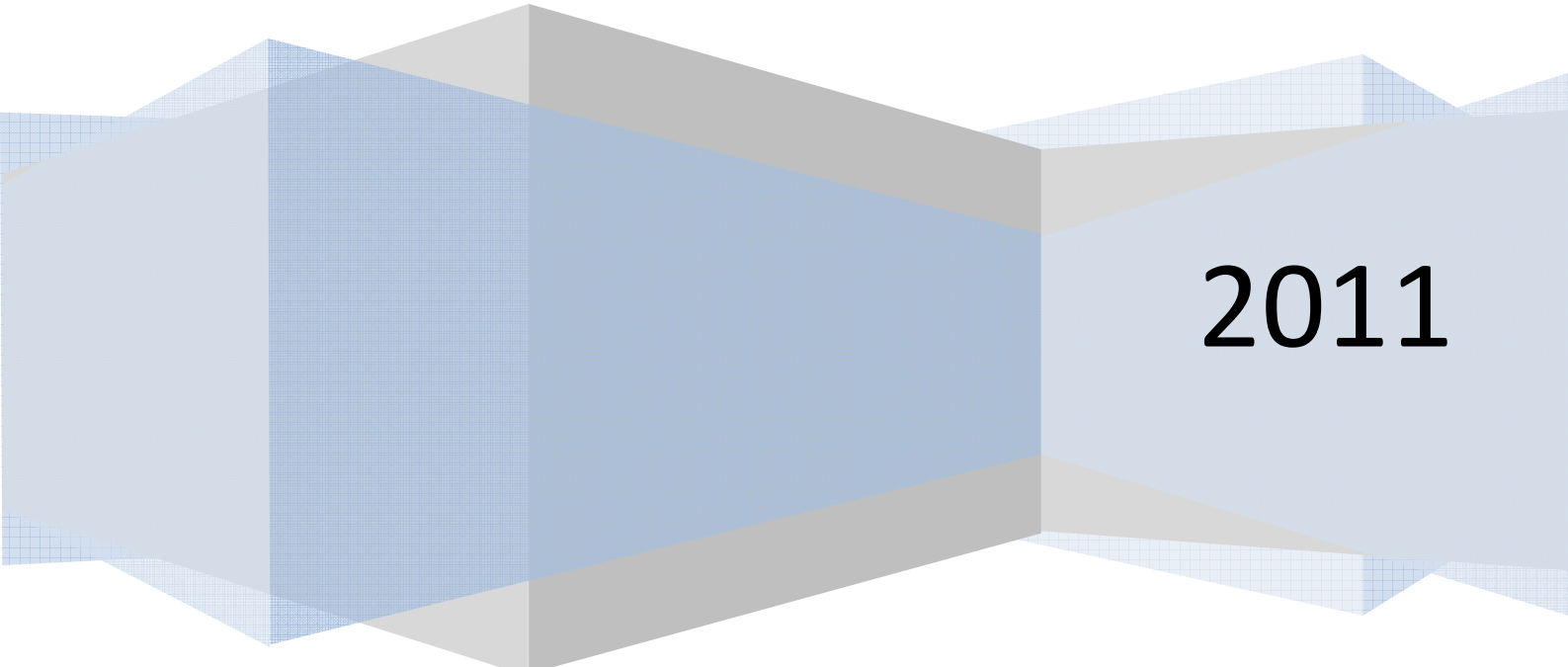
Yours faithfully

Melissa Watkins
Director Environmental Services

Attachment: Draft Economic Development Strategy

Dubbo DRAFT Economic Development Strategy

Ten Steps to Dubbo's Economic Success



2011

DUBBO'S VISION FOR ECONOMIC DEVELOPMENT:

***Dubbo....The Centre of NSW for Lifestyle, Services,
Transport and Industry.***

INTRODUCTION

Dubbo is the largest City in the Orana Region.

Dubbo is the major regional service centre in the Orana Region – and provides a range of community, industry and business services to the region, which extend well outside the borders of the Dubbo Local Government Area (LGA). Employment strengths have traditionally been in the service sectors of health and community, government, education, retail trade and tourism and there are a number of industrial and general business activities that occur in the City that support the broader agricultural and other industry value-adding activities.

Dubbo is strategically located on the Melbourne to Brisbane freight route at the intersection of the Newell and Mitchell Highways, drawing people and business to Dubbo from all directions as a major service centre in central NSW. This combined with its abundance of strategic assets and availability of commercial, industrial and residential land makes Dubbo an important centre with the potential for future prosperity and growth.

THE DUBBO ECONOMIC DEVELOPMENT STRATEGY

A new era of economic development

The Dubbo Economic Development Strategy is designed to inform future economic development activities to promote a sustainable, forward moving economy over the next five to ten years and defines the desired outcomes for our City.

Dubbo updates its Economic Development Strategy and Implementation Plan (Action Plan) to ensure the most appropriate framework and delivery, meeting the ever changing needs of business, industry and the community.

As the region's premier service centre, Dubbo relies heavily upon the strength of its local and regional population growth. Dubbo's economic strength is largely supported by its role as the premier service centre to the broader Orana and north western areas of New South Wales.

The Dubbo economy recorded a Gross Regional Product ("GRP") of \$2.1 billion in 2008/09. Economic growth averaged 8.5% per annum over the past three years, driven by the expansion in Dubbo's leading service and industrial sectors.

Through targeted development, action and leadership being achieved, this will ensure continual population growth and better outcomes for Dubbo and its region.

Producing a stronger economy through business investment, increased population & employment growth

The Dubbo community is committed to continue to support Dubbo's role as the premier service centre for the Orana region whilst diversifying the economy across a range of industry and skill sectors and pursuing new industry development initiatives as set out below.

Those established sectors most likely to result in a change in the regional economic structure include the following:

- Retail;
- Health, Aged Care & Community Services;
- Education & Training;
- Road, Rail, Air transport & Logistics;
- Livestock Selling;
- Financial & Professional Services;
- Building & Construction;
- Cultural & Sporting;

- Agricultural Manufacture & Services;
- Tourism; and
- Affordable Housing.

Those new and emerging sectors most likely to result in a change in the regional economic structure include:

- Mining & Resources;
- Renewable Energies R&D;
- Consumables Warehousing, Distribution & Logistics;
- Assembly & Manufacturing Plants;
- Eco & Cultural Tourism;
- Expanded regional air services to major Ports;
- Conventions, Events & Conferences;
- Intermodal expansion; and
- ICT development (NBN roll-out).

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DUBBO ECONOMIC DEVELOPMENT STRATEGIC FRAMEWORK

Strategies – The Ten Steps to Dubbo’s Economic Success

The Dubbo Economic Development Strategy brings together ten major strategies which have been identified by the Economic Development Strategy Working Party following detailed consideration of work undertaken by Consultants AEC Group in 2010 and feedback received from stakeholders and the community. This framework provides a reference tool to facilitate specific strategic direction for economic development activities in the pursuit of Dubbo’s Vision for Economic Development. The ten strategies relate to the following areas and are the cornerstone to the overall Economic Development Strategy:

STRATEGY 1 – INFRASTRUCTURE DEVELOPMENT

STRATEGY 2 – MINING & MINING SERVICES

STRATEGY 3 - TOURISM DESTINATION DEVELOPMENT

STRATEGY 4 – TRANSPORT & DISTRIBUTION

STRATEGY 5 – AGRICULTURAL SUSTAINABILITY & DIVERSIFICATION

STRATEGY 6 – THE REGIONS’ SERVICE CENTRE

STRATEGY 7 –WORKFORCE AND SKILLS DEVELOPMENT

STRATEGY 8 – ADVOCACY & LEADERSHIP

STRATEGY 9 – MARKETING & INVESTMENT ATTRACTION

STRATEGY 10 – BUSINESS & INDUSTRY EXPANSION

Key Strategic Outcomes & Tasks

The Key Strategic Outcomes and Tasks identified in the following section have been developed to respond to the ten (10) Strategies. The Key Strategic Outcomes and Tasks set the direction for the Strategy for Economic Development in the City and in some instances the region, while the Economic Development Action Plan (EDAP) is designed to provide specific Actions that will meet the Key Strategic Outcomes and deliver on the *10 Steps to Dubbo’s Economic Success*.

The Economic Development Strategy has been developed to be a 'living strategy' that will be used for the economic growth of the City and contribute to the success of the Region as distinct from an Economic Development Strategy for Dubbo City Council. Further, while the Strategy is designed to span a five (5) year period, as can be seen from the Strategies the Economic Development Strategy spans a much longer timeframe, while the Actions will be reviewed annually. It should also be acknowledged that there are Key Strategic Outcomes and Tasks that may be beyond the control or influence of Dubbo City Council and these may be the role of other levels of Government or even the private sector. It is therefore necessary to prioritise the Key Strategic Outcomes and Tasks and ultimately the Actions within the Economic Development Action Plan for short to long term implementation.

Prioritisation Framework & Economic Development Action Plan

The list of Key Strategic Outcomes and Tasks is extensive, however intentionally not exhaustive to provide for adjustment to the Action Plan as time goes on and/or new opportunities emerge with the implementation of the Strategy.

The prioritisation of the Key Strategic Outcomes and Tasks within each Strategy will be guided by two broad sets of assessment criteria – benefit assessment and capacity to implement as outlined below. Based on this, each action is then assigned as high priority (0-2 years), medium (2-3 years) or low *priority (3+ years)*.

- What **benefits** will the action deliver to the community, its residents and businesses if realised?
 - Will it bring more investment to the area?
 - Will it help to create more jobs?
 - What sort of jobs will it bring?
 - Will it create and grow local wealth?
 - Will it help to reduce leakages and retain and re-circulate more income in the region (through local multipliers)?
 - Are there other potential impacts (e.g. social, environmental, and cultural)?
- What is the Council's **capacity to implement** the project or activity?
 - Do we have the organisational capacity?
 - Do we have the financial resources?
 - Do we have the human resources?
 - Should it/could it be implemented by an external agency/body?

- Do we have the political and community will (i.e. will the community accept and support the activity) and capacity to implement the project or activity?

Based on the above criteria, it can be classified a high, medium or low priority. It is acknowledged that other criteria can also be applied with the use of local knowledge and consideration of other related objectives.

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STRATEGY 1 – INFRASTRUCTURE DEVELOPMENT

Strategy:

Dubbo provides the infrastructure base for a 55 000 resident population and a market population of 140 000.

Rationale:

Excellent transport infrastructure and other essential infrastructure, high environmental amenity and good access to a well qualified and well connected labour force are key requirements that both local businesses and globally oriented businesses look for in establishing or remaining in a region.

Key Strategic Outcomes & Tasks:

High standards in infrastructure development and maintenance are critical to sustain Dubbo's distinctive economic and geographical advantages to the business community. Key Strategic Outcomes and Tasks to ensure that Dubbo maintains and grows its competitive advantage include:

- **Monitor the infrastructure needs** of local industry and business sectors and encourage the private sector and all other levels of government to prioritise and align infrastructure implementation programs and funding to key economic development and employment projects for the region;
- **Foster opportunities for joint infrastructure projects** in cooperation with business and industry groups, government agencies and other local government;
- **Ensure adequate supply of available land** for residential, commercial and industrial purposes that supports a diverse local and regional economy and promotes economic growth;
- **Encourage sustainable development** and environmentally friendly business practices which protect and maintain the local natural environment and existing infrastructure, facilities and amenity;
- **Promote alternative energy sources and infrastructure;**
- **Monitor the availability of infrastructure and facilities** which may influence the ability to attract and retain businesses and population across the region;
- **Research critical infrastructure needs for key growth** industries in the region and identify and prioritise immediate infrastructure deficiencies;
- **Develop criteria for determining the priority projects** for infrastructure spending in the region giving consideration to those which will boost economic activity (such as jobs growth, developing external markets and productivity improvements);

- **Pursue improvements to and application of communication technology** in the region and encourage all new developments to have advanced communications/technological infrastructure available such as the National Broadband;
- **Promote the development of airport infrastructure** at the Dubbo City Regional Airport as an opportunity for business expansion in the aviation related industry and to support other business/industry expansion/investment; and
- **Encourage and promote partnerships with State and Federal governments** and agencies in respect of infrastructure needs of local businesses and for future investment in infrastructure (such as transport links, roads, broadband access and phone coverage).

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STRATEGY 2 – MINING & MINING SERVICES

Strategy:

Dubbo is the mining service centre for NSW.

Rationale:

The global and national demand for resources will result in continued investment and interest in the Region by extraction companies. Exploration activities and operating mines are key economic engines of the communities in which they are located. With appropriate strategies mining projects could bring more than their own direct employment to the City and the region. Dubbo is ideally situated to service the mining and minerals processing sector. By promoting Dubbo as the premier mining service centre, mining companies and other local stakeholders (government, education institutions, other businesses) can work together to ensure that Dubbo and the region can benefit from the presence of new investments and share in the growth potential of the economy.

Key Strategic Outcomes & Tasks:

Development of the Region's mining, resources and energy projects will significantly boost Dubbo's role in regional mining activity with potential opportunities arising for mining supply chain businesses to operate out of Dubbo in the future. Key Strategic Outcomes and Tasks to achieve this include:

- **Provide support including networking** on specific business development issues;
- **Ensure appropriate infrastructure investment and planning**, including investment in both hard and soft infrastructure for business and the community;
- **Promote Dubbo as the premier mining service centre;**
- **Ensure adequate land is available** to support investment and to provide accommodation options;
- **Support micro-enterprise initiatives that support** and service the mining sector and its employees; and
- **Encourage and support the provision of specialised training and education within Dubbo.**

STRATEGY 3 - TOURISM DESTINATION DEVELOPMENT

Strategy:

Dubbo is recognised as a key regional tourist and visitor destination in NSW comprising high quality local and regional attractions, recreation and cultural facilities and services that support and add value to the existing market and product offer.

Rationale:

Dubbo has a strong and established tourism sector. Dubbo enjoys high visitation levels when compared to other regional centres and, has high quality recreational and cultural facilities and is the home of the Taronga Western Plains Zoo, the largest regional tourism attraction in NSW attracting over 8 million visitors to the region since its opening. Further capitalising on these attributes will support this sector and provide for significant 'flow-on' effects for the City and the Region.

Key Strategic Outcomes & Tasks:

To ensure that Dubbo maintains its share of regional tourism and continue to grow this market there needs to be a strong focus on encouraging and attracting visitors through effective marketing and positioning of the City and its attractions, product development and diversification via further investment in tourism infrastructure throughout Dubbo. This will ensure that Dubbo continues to benefit from tourism as one of its key economic contributors. Key Strategic Outcomes and Tasks to further build on the current tourism environment include:

- **Establish a tourism destination development strategy** to enable market gaps and opportunities to be formally identified and provide relevant fact based information for future development/investment consideration;
- **Encourage diversification through tourism** product development based on the cultural, natural and built assets of the region;
- **Support alliances** between local operators such as the Taronga Western Plains Zoo, the Regional Tourism Organisation, Tourism NSW, the indigenous community, local industry associations and other relevant government departments and peak tourism organisations;
- **Utilise the region's natural and cultural environment** as tourist attractions in collaboration with tourism industry stakeholders to benefit from the \$24 Billion Australian Nature Tourism industry ;
- **Maintain and develop quality recreation infrastructure and public amenities** which support tourism offerings (such as recreation areas, accommodation, cultural facilities, tourism information facilities, service areas, signage and tourist trails);

- **Utilise the City's assets to attract business tourism and major events** to the region, and through collaboration attract high quality and high yield events;
- **Establish an identity** for Dubbo that reflects the community's aspirations and provides a platform for marketing and promotion of the City whilst identifying the City's unique selling points and year round tourism offer;
- **Support and encourage cooperative marketing and product development** initiatives ; and
- **Provide quality information** to enhance visitor experiences and attract visitation through a broad spectrum of mediums whilst identifying and responding to Dubbo's key tourism market segments.

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STRATEGY 4 – TRANSPORT & DISTRIBUTION

Strategy:

Dubbo is the road/rail/air transport and distribution centre for a wide range of operations.

Rationale:

Dubbo is ideally located to promote and expand as a transport and distribution centre.

Key Strategic Outcomes & Tasks:

High standards in transport infrastructure and development and their maintenance are critical to sustain Dubbo's distinctive economic and geographical advantages to the transport industry. Key Strategic Outcomes and Tasks to ensure that Dubbo maintains and grows its competitive edge in respect of transport and distribution include:

- **Expand and strengthen Dubbo's role** as a 'hub' for transportation and service operations;
- **Promote and market Dubbo** as a major transport and logistics 'hub' to support the mining sector;
- **Expand and promote Dubbo's role as a major road/rail interchange** centre;
- **Promote Dubbo as an air transport link** for interstate business and travel;
- **Plan/design efficient road and rail access** to complement requirements of industrial and agricultural expansion;
- **Promote partnerships with and encourage State and Federal governments,** agencies and industry in respect of the transport infrastructure needs of local businesses and the need for future investment in infrastructure; and
- **Ensure adequate high quality land is available** to support demand for transport and distribution developments.

STRATEGY 5 – AGRICULTURAL SUSTAINABILITY & DIVERSIFICATION

Strategy:

The agricultural base is diverse and takes advantage of all opportunities to value add to agriculture to ensure economic and environmental sustainability.

Rationale:

Dubbo is the centre of a major agriculture production area that engages predominantly in grain, sheep and beef cattle farming and acts as the Region's agricultural industry service centre through the provision of a wide range of agricultural services, livestock markets, processing facilities and supply chain businesses. In 2008/09, agriculture contributed \$43.7 million in industry value add to the Dubbo economy, 2.1% of Dubbo's GVA with the average dollar per employee being estimated to be almost \$95,000. Given the 'Millennium Drought', these figures highlight the strength and efficiency of the agriculture sector in the Region. It is critical that this sector be supported to further grow and diversify to ensure its longevity and maintain its contribution to the national food supply.

Key Strategic Outcomes & Tasks:

Dubbo has an opportunity to take advantage of its strategic location, land availability and water resources cementing its agricultural future in spite of the climatic conditions and the global economic conditions. Key Strategic Outcomes and Tasks to achieve this are as follows:

- **Maintain and develop Dubbo as the premier centre for regular commercial fat and store sheep and cattle sales and the indoor show and sales centre for stud cattle, sheep and horses in NSW;**
- **Expand Dubbo as a major food processing centre;**
- **Position Dubbo as a centre for agriculture based manufacturing and service centre;**
- **Establish and promote Dubbo as a centre for diverse sustainable farming practices;**
- **Encourage the expansion of agricultural education and research and development;**
- **Promote Dubbo as a cost effective and central location for food and product transport and distribution;**
- **Position Dubbo as an ideal location for carbon trading/sequestration and offsets; and**
- **Promote the diversity of Dubbo's agriculture base and the opportunities available for agricultural investment at any scale.**

STRATEGY 6 – THE REGIONS' SERVICE CENTRE

Strategy:

Dubbo is the region's service centre for health, education, retail and other services and facilities catering for a resident population of 55 000 people and a service population of 200 000 people.

Rationale:

Improving Dubbo's competitive position through population growth and the expansion of business services to the broader community, will improve Dubbo's attractiveness as a place to live, work, invest and play.

Key Strategic Outcomes & Tasks:

In order to develop the region's competitiveness and support the region's population, key activities will include:

- **Improvements to and within the health services sector, by:**
 - ✓ **Lobbying** for completion of a new Dubbo Base Hospital within 5 years;
 - ✓ **Encouraging the expansion** of the offer of health services training/education; and
 - ✓ **Increased air linkages** to other centres such as Newcastle, Melbourne and Brisbane.
- **Improvements in education and amenity, by:**
 - ✓ **Attracting a more diverse range of secondary schooling opportunities and facilities; Diversification of post-school education and training** available in the region; and
 - ✓ **Encourage the expansion of tertiary courses available in Dubbo.**
- **Streamlined approval and information process, by:**
 - ✓ **Developing a streamlined approvals process** with a user friendly pathway to development; and
 - ✓ **Providing a central point of contact for businesses** to seek advice and information for investing in Dubbo.
- **Promotion of a positive image** through proactive public relations, including:
 - ✓ **Consistent news and media release** regarding lifestyle highlights in Dubbo; and
 - ✓ **Promotion of Dubbo through the Evocities platform** and within the region as a "Service Centre".

STRATEGY 7 – WORKFORCE & SKILLS DEVELOPMENT

Strategy:

Dubbo provides workforce and skills development and training opportunities that assist in retaining students and workers in the region and attracts new workers and skills that support a growing employment and skill(s) base.

Rationale:

If residents can increase their skills, they can increase their contribution to the economy and may have more valuable employment opportunities. At the same time, increases in innovation and R&D activities and capabilities of the region will result in a stronger and more knowledge-driven economy over time. A highly skilled and innovative workforce can assist local companies to grow and attract new companies.

Key Strategic Outcomes & Tasks:

In order to develop the regional workforce and retain skills and workers in the Region, Key Strategic Outcomes and Tasks will include:

- **Delivery of a Skills Development Program, which:**
 - ✓ **Develops the existing workforce** and assists in retaining these workers in the region;
 - ✓ **Delivers education and training** to increase the capabilities of the community, staff and expertise allowing for general ‘up-skilling’ across the region;
 - ✓ **Facilitates growth in collaborations and partnerships** between industry and education and training providers in the region;
 - ✓ **Promotes training courses and skills development programs available within the City;** and
 - ✓ **Promotes the region** so that appropriately skilled workers can be attracted to the region.
- **Understand the nature of demand** and supply by:
 - ✓ **Engaging with local business** and understanding skills and labour needs gaps; and
 - ✓ **Delivery of a regular skills and labour needs survey** to track skilling and workforce requirements in the region and feeding this information back to education and training providers in the region.
- **Encourage the promotion and expansion** of locally available tertiary education opportunities.

STRATEGY 8 – ADVOCACY & LEADERSHIP

Strategy:

Dubbo is recognised for its clear and consolidated advocacy and leadership in economic development.

Rationale:

Building a stronger business environment will assist the economy to grow. Dubbo City Council can advocate on behalf of business to support major infrastructure improvements and other government policies both internal to Dubbo City Council and external (State and Federal government).

Key Strategic Outcomes & Tasks:

In order to provide regional advocacy and leadership, key Strategic Outcomes and Tasks will include:

- **Communication and engagement** with industry, government and the community:
 - ✓ **Promote** industry collaboration and cooperation by holding a number of forums for emerging and existing industry to support supply chain development, clustering and formation of partnerships in and around the region;
 - ✓ **Lobby** for infrastructure funding to support growth of the sector and improve the accessibility of the region in response to identified and prioritised needs;
 - ✓ **Develop partnerships** with State and Federal government to develop regulations and business incentives to facilitate economic growth and diversification;
 - ✓ **Manage environmental assets** in the region to ensure that resources are protected in the region and growth is sustainable (e.g. water, land, environment);
 - ✓ **Develop an engagement framework that promotes collaboration and cooperation between Dubbo City Council and State and Federal Government** ; and
 - ✓ **Develop a policy** to support environmental and renewable industry development and technology, including incentives for business development and investment.
- **Undertake activities to promote consolidated, united and representative action** by business, industry, government and the broader community, by:
 - ✓ **Develop a consolidated and united approach within Council** by understanding the needs of community and developing appropriate actions, to move the region forward;
 - ✓ **Proactively form partnerships** to assist in achieving investment outcomes (infrastructure and business);

- ✓ **Provide clear communication and information** flow to and from Government, stakeholders and the broader community based on an adopted engagement framework; and
- ✓ **Facilitate an active and united lobbying stance.**

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STRATEGY 9 – MARKETING & INVESTMENT ATTRACTION

Strategy:

Dubbo attracts investment and residents through the provision of attractive economic, social and visual amenity which identifies and promotes Dubbo as a superior development and lifestyle location.

Rationale:

New businesses are an important source of investment in communities. Attracting new business to a regional area generates employment and increases the diversity and prosperity of the local economy. Consultation with the Dubbo community identified a strong need to diversify the economy in Dubbo. This will require both public and private investment attraction to the region in the form of business, property and infrastructure investment including government funding for community assets, transport infrastructure, health and education infrastructure.

Promotion and marketing campaigns can generate a positive image for a region and make it more attractive for consumers and potential investors. These activities can also help to unify a broad range of local industries and businesses under a particular banner, and can raise the profile of locally produced goods and services.

Key Strategic Outcomes & Tasks:

A proactive marketing and business development program requires succinct, targeted and informative marketing materials. Once developed, these materials need to be utilised as part of a proactive and aggressive marketing and business development program. Through a systematic approach to market research, business development and marketing, Dubbo can identify and engage with prospective investors about generating jobs in the area. In order to attract investment to the Region, key Strategic Outcomes and Tasks will need to include:

- **Development of marketing material** required to promote Dubbo as a business location and to highlight the growth opportunities available, including:
 - ✓ **General business location highlighting the competitive advantages** of the area and reasons to invest in Dubbo;
 - ✓ **Individual profiles regarding specific growth opportunities; and**
 - ✓ **Use of leverage from the Evocities Marketing Campaign.**
- **Execution of a business development and marketing program** to identify and engage with prospective investors, including:
 - ✓ **Market research** to identify prospective investors and industry market trends;
 - ✓ **Strategic** approaches to identified industry sectors promoting the opportunities and benefits of Dubbo as a business location; and

- ✓ **Business to network and engage** with specific prospective investors to discuss the benefits of locating to Dubbo.

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STRATEGY 10 – BUSINESS & INDUSTRY EXPANSION

Strategy:

Dubbo assists local business and industries to grow and prosper through the execution of a business expansion and retention program.

Rationale:

Assisting existing businesses to grow will increase local employment, increase GRP and increase skills as well as raising the level of innovation in the Region and allow for existing business capabilities to be built upon, delivering more value adding opportunities.

Key Strategic Outcomes & Tasks:

Development of programs for business expansion and retention in Dubbo would allow for communication networks to be established between existing business and industry and allow for collaboration and communication to capitalise on regional opportunities. Delivery of these programs will allow assistance to be provided where most needed to the business community.

In order to support and assist local business in Dubbo, key Strategic Outcomes and Tasks will need to include:

- **Executing a business expansion and retention program by:**
 - ✓ **Promotion of the City** through an extensive marketing campaign to assist with business expansion and retention (e.g. online retail);
 - ✓ **Engagement with existing business** to better understand the challenges for business and to provide information (e.g. online retailing);
 - ✓ **Provision of events and seminars** for local business to assist communication and promote collaborative opportunities and partnership development;
 - ✓ **Ensuring that commercial and industrial land use planning and regulations are streamlined** to facilitate and promote business expansion and investment; and
 - ✓ **Assisting local business and industry in ‘tapping’ into State and Federal support** programs.
- **Undertaking local business skills development program by:**
 - ✓ **Facilitating business support and training** initiatives to the Dubbo business community to increase general business skills and improve general functionality and competitiveness of the Dubbo business community;
 - ✓ **Providing information on technology, R&D and IP protection** to encourage an innovative environment for local business whilst protecting ideas, revenues and future commercialisation streams;

- ✓ **Assisting with identification of technology requirements and sourcing** of technology to support new product and service development in emerging sectors (e.g. wind, solar and renewable energies); and
- ✓ **Facilitating supply chain matching to support emerging alternative energy industry growth.**

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IMPLEMENTATION

Without Dubbo City Council and community involvement and effective implementation, the Economic Development Strategy cannot succeed. The Strategy provides specific guidance and direction for economic development activities, but only a concerted effort and specific actions will result in the desired outcomes. Accordingly, the Strategies will be delivered by the Economic Development Action Plan.

Economic Development Action Plan

The EDS provides long term guidance and direction for Dubbo City Council. It includes practical activities organised across ten strategic themes and is geared toward delivering practical outcomes and achieving the economic vision for the future. However, the strategy will only succeed if it can be successfully implemented. The Economic Development Action Plan (EDAP) is the implementation tool (outlined in a separate document) for the Economic Development Strategy.

The EDAP provides specific day-to-day tasks and activities to be undertaken in order to achieve the goals and vision of the Economic Development Strategy. The EDAP is a 12-month operational plan providing specific activities, key performance indicators (KPIs) and where appropriate the proposed budgets and responsibilities as well as offering an annual planning tool for Council for economic development.

Being an annual program, the EDAP will be flexible to adjust to the changing market dynamics as well as the new opportunities that may present themselves with the longer term focus maintained through the Economic Development Strategy. In such a manner, the EDS remain flexible but focused on delivering the future vision for the Dubbo region.

Roles and Responsibilities

Achieving economic development opportunities and goals for the Dubbo region will not occur in isolation but will require the concerted efforts of many individuals and organisations, both in the public and private sector. As such, contribution will be required from a wide variety of partners from within the Region and beyond, including (but not limited to):

- Local, State and Federal Government;
- Regional Economic Development Organisations;
- ✓ Education and training providers;
- Regional business owners; and
- Other business organisations (e.g. Chamber of Commerce, etc.).

MONITORING AND EVALUATION

As with any program, it is important to monitor and measure the success of the Economic Development Strategy and Action Plan. Annual targets/goals will be established for each task to track this activity. It will be necessary to measure the actual targets/goals achieved for each task, together with the resources (both human and financial) dedicated to each task. In such a way, the economic development performance and effectiveness of implementation can be measured.

After evaluating the actual goals/targets reached for each task and the value each task delivered to the community (in line with the resources it consumed), specific tasks can be reassessed for appropriateness of application, resource requirements or amendments to the goal/target. Accordingly, the Action Plan becomes an effective planning tool that should be adjusted on an annual basis but continues to align with the original goals/targets and strategic themes determined. Additionally, flexibility allows for the ability to adjust to market conditions and change the strategic actions as needed. However, activities must be aligned to each strategic theme and the economic development objectives to ensure that future activities continue to work toward the long term vision and goals of the strategy

Quarterly reports will also be generated to demonstrate the tasks completed in the quarter, the performance versus stated goals/targets and the anticipated tasks for the coming period. At six months an assessment will be carried out to understand what progress has been made and if required adjustments are made to the EDAP at the conclusion of the twelve month implementation period.

Economic Profile

Dubbo City Council

Final Report
October, 2010

A leading Australian consulting group recognised through the success of our clients



- Economics, Planning & Development 
- Business Strategy & Finance 
- Community Research & Strategy 
- Design, Marketing & Advertising 
- Information & Knowledge Management 

Document Control

Job ID: 15581
Job Name: Dubbo Economic Development Strategy
Project Director: Simon Smith
Project Manager: Ashley Page
Company: Dubbo City Council
Job Contact: Megan Dixon
Document Name: DUBBO EDS Updated Economic Profile Final Report.docx
Last Saved: 27/10/2010 1:22 PM

Version	Date	Reviewed PM	Approved PD
Draft Report v1.0	22 nd June 2010	SJC	SS
Draft Report v2.0	2 nd July 2010	SJC	SS
Draft Report 2.1	16 th July, 2010	ARP	SS
Draft Report 2.2	2 nd August 2010	ARP	
Draft Report 3.0	16 th September 2010	ARP	
FINAL REPORT	27 th October 2010		

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Executive Summary

Background

Dubbo is the largest City in the Orana Region and is located at the intersection of the Newell and Mitchell Highways in central western New South Wales. Dubbo boasts a large existing skilled workforce, accessibility via its major roads, rail and airport and the necessary community infrastructure to make this City a vital centre for the wider regional population in terms of major services and business support.

Purpose of Report

The purpose of this report is to present a range of economic and demographic data for the Dubbo Local Government Area (LGA) in order to capture the current economic and business conditions of the region using the most recent available statistical information.

This information will be used by government, business and industry and economic development organisations to formulate policy and planning for the region. The Dubbo Economic Profile also provides a useful source of information for business owners and industry leaders through the promotion of Dubbo as a ideal location to invest and do business as a major regional service centre in regional New South Wales.

Summary of Regional Economic Performance

Dubbo is a major centre for population, industry and support services in the Orana Region of central western NSW...

- Population growth in Dubbo averaged 0.8% per annum to 41,211 persons in 2009 and is the established service centre for the wider Orana region of regional New South Wales.
- Over the past five years, the broader Orana Region has experienced slight declines in population of 0.1% per annum. As Dubbo's economic strength is largely supported by its role as service centre to the broader Orana and north western areas of New South Wales, declines in population for the wider Orana Region are cause for major concern.
- The Dubbo economy recorded a Gross Regional Product of \$2.1 billion in 2008-09 with the main contributing industries being construction, wholesale trade, health care & social services and public administration & safety.
- Economic growth averaged 8.5% per annum over the past three years, driven by the expansion in Dubbo's leading service and industrial sectors (listed above) in addition to the transport, postal & warehousing sector highlighting the growth in both the provision of services and in industrial activity in Dubbo.

A skilled labour supply with accessibility to education infrastructure and employment opportunities making for a vibrant working population...

- Dubbo has a relatively young working aged population compared to the State and also has significant education and training infrastructure based locally to support the skilling and development of its growing workforce.
- Unemployment in Dubbo remains relatively low at 4.6%, compared to the Orana Region (6.5%) and the State (5.9%), after experiencing growth in labour force of almost 2,500 over the past five years to almost 22,000 persons in March Quarter 2010.
- Growth in labour force combined with declining unemployment rates is further evidence of the strong employment opportunities in the region.

As a primary service centre in the Orana, Dubbo readily accesses major transport and utility infrastructure...

- Dubbo is the largest City in the Orana Region and is located at the intersection of the Newell and Mitchell Highways in central western New South Wales and is accessible by road, air and rail. Dubbo is strategically located on the Melbourne to Brisbane freight route and is only five hours drive from Sydney CBD.
- As a major service centre Dubbo has accessibility to all the major utility infrastructure which is supplied to both residents and industry in the area including natural gas, electricity, water and waste water services and telecommunications.

Dubbo offers a high quality of life through the provision of relatively affordable housing, job opportunities and accessibility to major community infrastructure...

- The presence of major community assets such as hospitals, schools, higher education facilities and other community assets makes Dubbo a highly livable city in regional NSW which is important for attraction and retention of skilled workers and their families to the City.
- Compared to other major centres in regional New South Wales, such as Orange, Bathurst, Wagga Wagga, Tamworth and Albury, Dubbo has cheaper rents and median house prices, emphasising the affordability of Dubbo as a regional City in New South Wales.

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1. Introduction

1.1 Purpose of Report

The purpose of this report is to present a range of economic and demographic data for the Dubbo Local Government Area (LGA) in order to capture the current economic and business conditions of the region using the most recent available statistical information.

This information will be used by government, business and industry and economic development organisations to formulate policy and planning for the region. The Dubbo Economic Profile also provides a useful source of information for business owners and industry leaders through the promotion of Dubbo as an ideal location to invest and do business as a major regional service centre in regional New South Wales.

1.2 Catchment

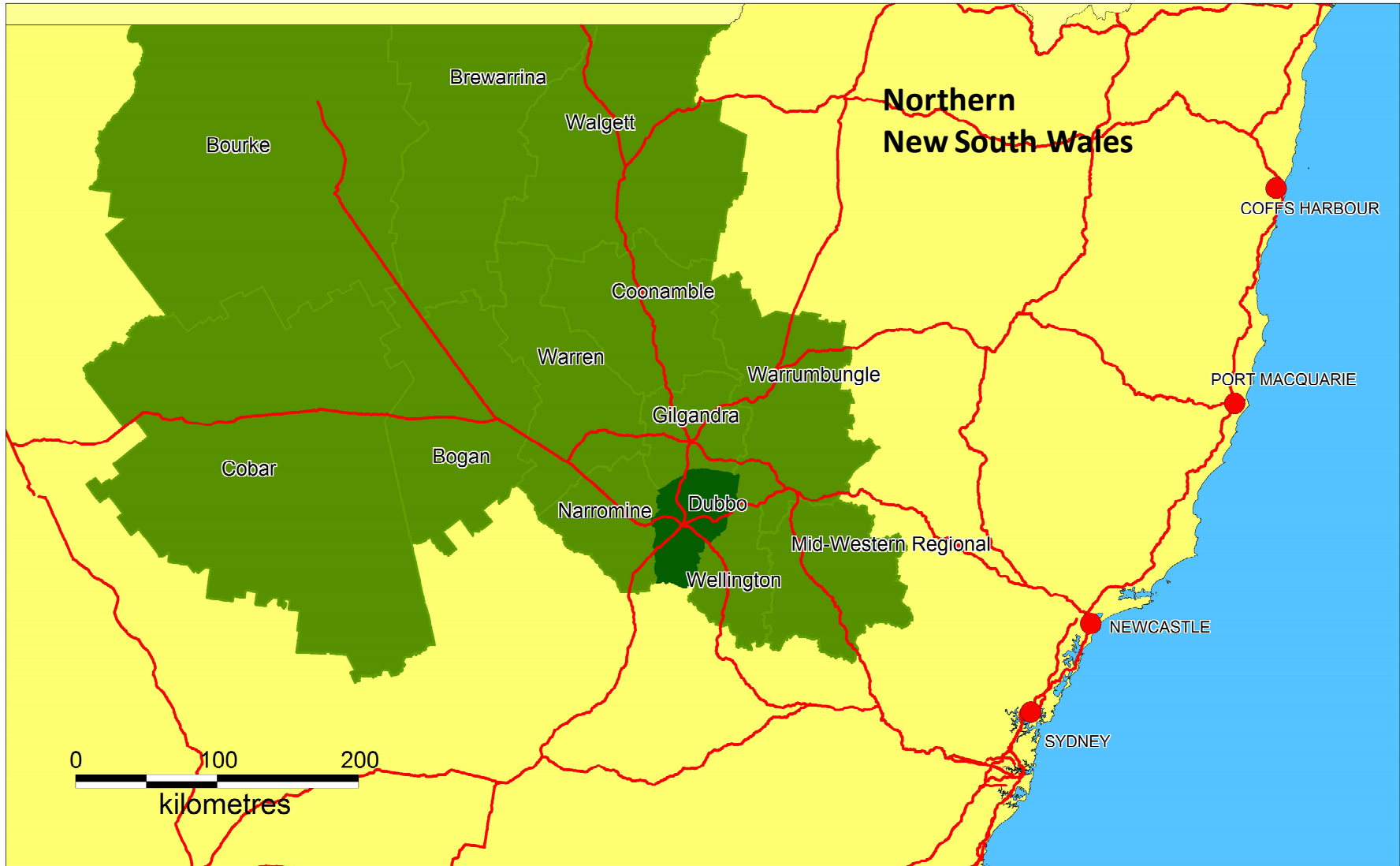
Dubbo is the largest City in the Orana Region and is located at the intersection of the Newell and Mitchell Highways in central western New South Wales (refer to Figure 1.1). Dubbo boasts a large existing skilled workforce, accessibility via its major roads, rail and airport and the necessary community infrastructure to make this City a vital centre for the wider regional population in terms of major services and business support.

The major comparison area to Dubbo is Orana Region which is comprised of Dubbo and the Local Government Areas of:

- Bogan;
- Bourke;
- Brewarrina;
- Cobar;
- Coonamble;
- Gilgandra;
- Mid-Western Regional;
- Narromine;
- Walgett;
- Warren;
- Warrumbungle; and
- Wellington.

Statistical comparisons with the surrounding LGA's of Narromine, Gilgandra, Parkes and Forbes will also be made, as these areas are significant population centres and activity hubs which surround the City of Dubbo.

Figure 1.1: Dubbo City & the Orana Region



Source ABS (2003)



2. Summary of Key Indicators

Table 2.1: Summary Table of Key Indicators, Dubbo

Description	Period	Indicator	% Annual Change
Population (No.)	2009	41,211	0.8%
Projected Population (NSW Planning)	2036	46,408	0.4%
Projected Population (ABS)	2036	46,763	0.5%
Gross Regional Product			
GRP (\$M)	2008-09	\$2,077	4.8%
<i>Key Industry Sectors (\$M)</i>			
Construction	2008-09	\$191.2	15.7%
Health care and social assistance	2008-09	\$187.5	21.5%
Wholesale trade	2008-09	\$149.4	133.7%
Public administration and safety	2008-09	\$147.8	12.0%
Manufacturing	2008-09	\$121.4	-9.9%
Education and training	2008-09	\$115.5	16.9%
Retail trade	2008-09	\$114.1	-5.8%
Transport, postal and warehousing	2008-09	\$106.0	0.5%
Agriculture, forestry and fishing	2008-09	\$43.7	-21.0%
Employment			
Labour Force	Mar Q 10	21,281	1.7%
Employment	Mar Q 10	20,311	1.0%
No of unemployed	Mar Q 10	970	20.5%
Unemployment Rate ^a	Mar Q 10	4.6%	0.7%
Property & Land			
Median Sales Price (\$) House	YE Jun 10	\$242,000	2.8%
Median Sales Price (\$) Townhouse/Unit	YE Jun 10	\$175,000	-20.5%
Median Weekly Rents (\$) - 2 bed dwelling	YE Jun 10	\$170	2.9%
Median Weekly Rents (\$) - 3 bed dwelling	YE Jun 10	\$250	3.7%
Median Weekly Rents (\$) - 4 bed dwelling	YE Jun 10	\$320	5.7%
Building Investment			
Dwelling Investment (\$M)	YE Jun 10	\$69.1	38.2%
Non-Residential Investment (\$M)	YE Jun 10	\$82.4	256.0%

Source: ABS (2005), ABS (2010a), DEEWR (2010), ABS (2010b), Australian Property Investor (2010), AECgroup GRP Model (2010), NSW Department of Housing (2010), NSW Planning (2010a)

3. Population

3.1 Historical & Projected Population

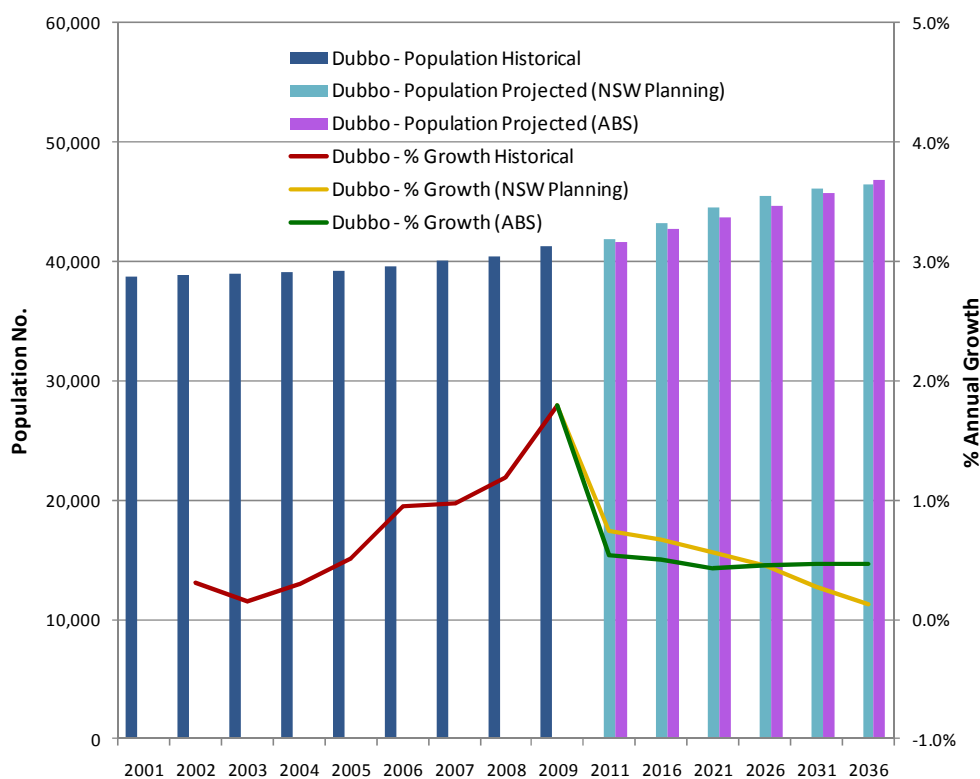
Dubbo has experienced average population growth of 0.8% per annum since 2001 to 41,211 persons in 2009, slightly below the average of the State (1.0% per annum). Meanwhile over the same period the Orana Region experienced population declines of 0.1% per annum. As much of Dubbo’s services and population demand driven industries are dependent on the broader regional population it is important that population in the surrounding areas continues upward.

With marginal population declines experienced in the wider Orana Region over the past five years, it is unlikely that there have been significant impacts to population services industries located in Dubbo, particularly as the City centre continues to grow. However, for the Dubbo economy to continue sustainably as a growing service centre to the broader region it will be important that regional population growth trends in the Orana Region are turned around.

Over the next 30 years (to 2036), Dubbo is expected to continue to experience a steady growth of between 0.4% per annum to 46,408 persons by 2036 (NSW Planning projection) and 0.5% per annum to 46,763 persons by 2036 (ABS Projection). Although both are significantly below historic growth.

This is in contrast to the trend of the Orana Region which is expected to experience population declines of between 0.1% (ABS Projection) and 0.3% per annum (NSW Planning Projection) over the same period. This is indicative of population migration trends being experienced by regional areas across Australia which will see many people relocating within regions to live in major service centres, such as Dubbo, in the future.

Figure 3.1: Historical & Projected Population, 2001-2036



Source: ABS (2005), ABS (2010a), NSW Planning (2010)

Table 3.1: Historical & Projected Population

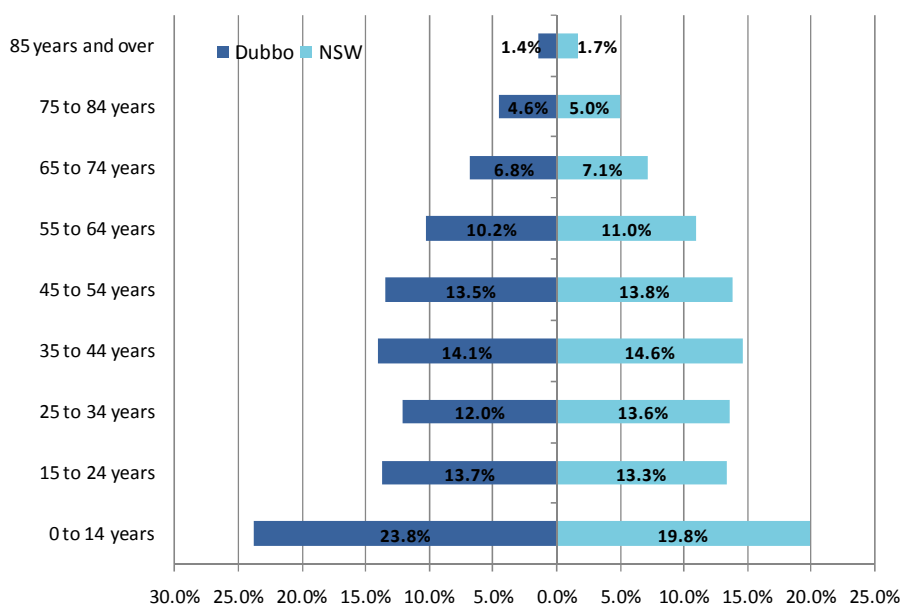
Area	Historical		Projected – ABS		Projected – NSW Planning	
	2009	% Av. Ann. Growth 2001-09	2036	% Av. Ann. Growth	2036	% Av. Ann. Growth
Dubbo	41,211	0.8%	46,763	0.5%	46,408	0.4%
Narromine	6,818	-0.5%	6,938	0.1%	5,867	-0.6%
Gilgandra	4,669	-0.3%	3,656	-0.9%	3,671	-0.9%
Parkes	15,052	0.0%	13,303	-0.5%	14,200	-0.2%
Forbes	9,744	-0.5%	8,563	-0.5%	8,087	-0.7%
Orana Region	122,100	-0.1%	118,558	-0.1%	113,703	-0.3%
NSW	7,134,421	1.0%	8,568,854	0.7%	9,192,556	0.9%

Source: ABS (2005), ABS (2010a), NSW Planning (2010a)

3.2 Age Distribution

Dubbo has a relatively young population when compared to the Orana Region and the State evidenced by a higher proportion of children (aged below 15 years) and younger working aged persons (15 to 24 years) as well as a lower average age in the general population.

Figure 3.2: Age Distribution, 2006



Source: ABS (2007a)

Table 3.2: Average Aged & Age Cohorts, 2006

	Average Age	% Persons aged below 15 Years	% Persons Aged 15 to 64 Years	% Persons Aged Above 65 Years
Dubbo	35.7	23.8%	63.5%	12.8%
Narromine	37.6	23.5%	61.5%	15.0%
Gilgandra	39.6	22.0%	60.0%	18.0%
Parkes	38.2	23.0%	60.3%	16.7%
Forbes	39.0	22.3%	60.5%	17.3%
Orana Region	37.6	24.1%	60.4%	15.5%
NSW	33.4	26.5%	63.8%	9.8%

Source: ABS (2007a)

Over the next 20 years, it is expected that the Dubbo population will continue to age in line with the aging trend of the State. By 2036, it is likely that over a quarter of Dubbo's population will be over the age of 65 years (compared to 13% in 2006), resulting in an increased demand for health services and aged care facilities in the Dubbo Region.

3.3 Cultural Diversity

Dubbo and the wider Orana Region have a high indigenous population of 10.3% and 12.5%, respectively, when compared to the State proportion of 2.1%.

Compared to the State, Dubbo has a low proportion of persons that are born outside of Australia with the key industries of origin being the United Kingdom, New Zealand and India.

As such, less than 10% of the population speak a language other than English (LOTE) at home. The top three languages spoken at home are Arabic, Cantonese and Italian making up less than 1% of the population.

Table 3.3: Indigenous Status & Country of Birth, 2006

Description	Dubbo	Orana Region	NSW
Indigenous Status			
Population (2006)	37,844	114,631	6,549,178
% Indigenous	10.3%	12.5%	2.1%
Country of Birth			
Australia	87.3%	87.3%	69.0%
United Kingdom	1.4%	1.8%	4.1%
New Zealand	0.7%	0.8%	1.6%
India	0.2%	0.1%	0.9%
Other	10.5%	10.1%	24.4%
Total	100.0%	100.0%	100.0%
Language Spoken At home			
English	91.4%	92.6%	74.0%
Arabic	0.3%	0.1%	2.5%
Cantonese	0.2%	0.2%	2.0%
Italian	0.2%	0.2%	1.3%
Other	7.9%	6.9%	20.2%
Total	100.0%	100.0%	100.0%

Source: ABS (2007a)

4. Size & Structure of the Economy

4.1 Gross Regional Product

In 2008-09, Dubbo had an estimated Gross Regional Product (GRP) of \$2.1 billion, 4.8% more than estimated in 2007-08 and representing 0.5% of New South Wales' Gross State Product (GSP).

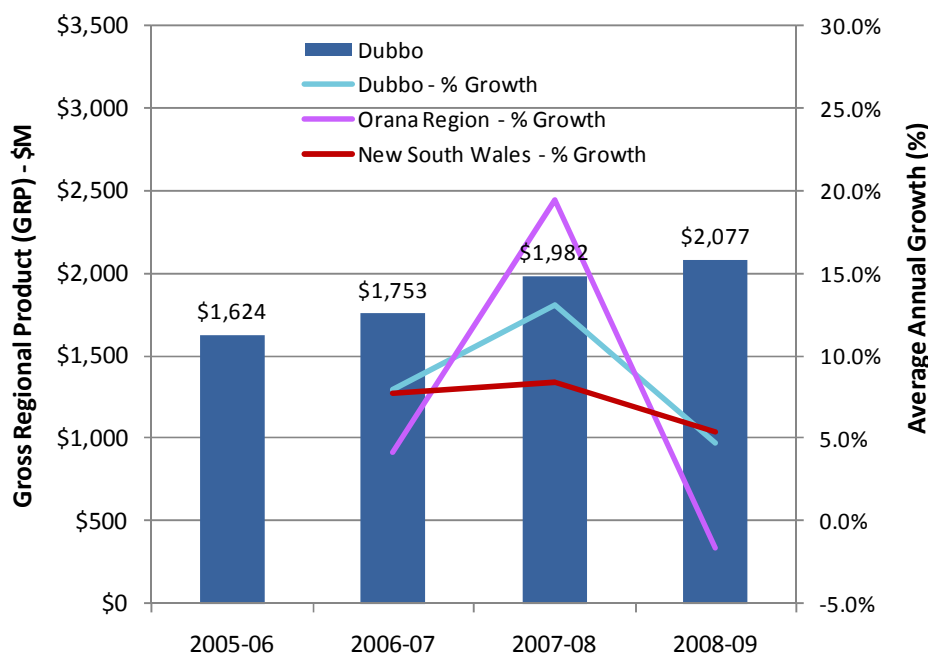
The Dubbo economy averaged 8.5% annual growth over the past three years, well above the performance of the Orana Region and New South Wales over the same period and highlighting the strong performance experienced by the economy in the two years prior to the Global Financial Crisis (GFC).

Growth in the Dubbo economy over the past three years has been driven by the expansion in a number of sectors, including:

- Wholesale trade (22.4% per annum);
- Health care & social assistance (12.9% per annum);
- Construction (12.5% per annum);
- Transport, postal & warehousing (12.2% per annum); and
- Public administration & safety sectors (8.9% per annum).

These growth sectors highlight growth across a diverse range of sectors, including the provision of services and industrial activity in Dubbo.

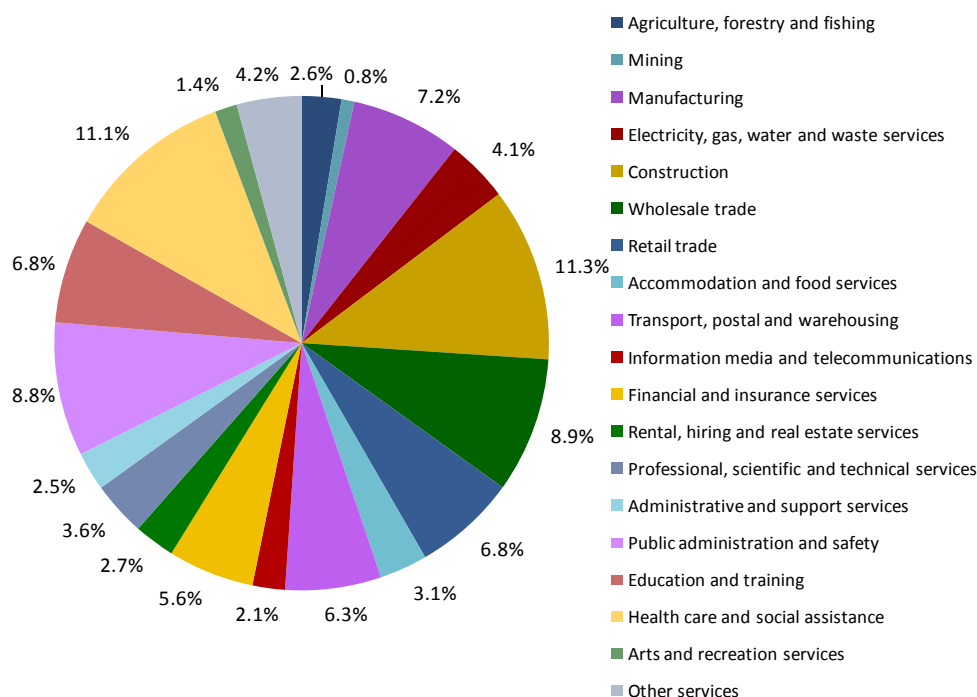
Figure 4.1: Dubbo Gross Regional Product, 2005-06 to 2008-09



Source: AECgroup (2010)

In 2008-09, the leading sectors (by value) in Dubbo were construction (11.3%), health care & social assistance (11.1%), wholesale trade (8.9%) and public administration & safety (8.8%).

Figure 4.2: % Industry Contribution to Gross Value Add (GVA), 2008-09



Note: Industry Value Add (GVA) excludes ownership of dwellings and taxes and subsidies which are included in Gross Regional Product/Gross State Product.
Source: AECgroup (2010)

Table 4.1: % Industry Contribution to GVA, 2008-09

Description	Dubbo	Orana Region	NSW
Agriculture, forestry and fishing	2.6%	10.2%	1.8%
Mining	0.8%	15.8%	3.6%
Manufacturing	7.2%	5.3%	10.2%
Electricity, gas, water and waste services	4.1%	3.4%	2.3%
Construction	11.3%	8.7%	7.7%
Wholesale trade	8.9%	6.0%	5.4%
Retail trade	6.8%	5.4%	4.8%
Accommodation and food services	3.1%	3.0%	2.9%
Transport, postal and warehousing	6.3%	4.8%	6.2%
Information media and telecommunications	2.1%	1.2%	4.8%
Financial and insurance services	5.6%	3.2%	16.6%
Rental, hiring and real estate services	2.7%	1.8%	3.3%
Professional, scientific and technical services	3.6%	2.7%	7.7%
Administrative and support services	2.5%	1.8%	3.4%
Public administration and safety	8.8%	7.4%	5.0%
Education and training	6.8%	6.5%	4.4%
Health care and social assistance	11.1%	8.5%	6.6%
Arts and recreation services	1.4%	1.2%	1.1%
Other services	4.2%	3.2%	2.1%
Total Industry (%)	100.0%	100.0%	100.0%

Note: Industry Value Add excludes ownership of dwellings and taxes and subsidies which are included in Gross Regional Product/Gross State Product.
Source: AECgroup (2010)

Compared to the Orana Region and the State, the significance of construction, retail trade, health care & social assistance and education & training to the Dubbo economy demonstrates the strong population growth that the region has seen in recent years and the role that Dubbo plays as a major regional service centre.

Despite being the centre of a traditional agriculture area, Dubbo has a lower reliance on agriculture than the wider Orana Region, which is reflective of Dubbo’s diversity and reliance on other service based and industrial sectors of the economy. In 2008-09, Dubbo’s agriculture sector contributed 9.2% to the Orana Region’s total agriculture industry value add.

The wider Orana Region has significant mining sector activity due to the presence of a number of major gold and minerals mines (Cobar) and some coal extraction (Mudgee) (DPI, 2010). Currently, Dubbo has a very low reliance on the mining sector despite a regional strength in mining activity. The development of the Dubbo Zirconia Project (approval pending), one of the world’s largest zirconia and rare earth metals deposits, will increase the contribution of mining to the Dubbo regional economy in the future, as will the Cobborra coal mine project. It is also likely to increase the demand for mining services and relevant supply chain demand within Dubbo City.

Construction is the largest sector (by value) in the Dubbo regional economy, which is due to a combination of population demand for building over the past few years (including the development of housing and community facilities) and the presence of residential and commercial building companies in the City which operate Australia wide. An emerging demand for construction services by the regional mining sector may provide some short to medium term opportunities for the construction industry in the region.

Wholesale trade is one of the fastest growing sectors in the Dubbo economy and has an industry value add contribution that is significantly higher than the State. This is reflective of Dubbo’s supporting role to regional agriculture, mining, industrial (manufacturing & transport) and residential development in the area. As a regional location, future growth in Dubbo’s wholesale trade sector will be dictated by both population and industrial sector growth in demand.

4.2 Value of Employment

When considering employment and the importance it has on the overall economy, it is important to consider the value of employment (based on industry) in addition to the overall total employment figures. The table below demonstrates industry value add (GVA) per employee and represents the value that one job in the various industries generates for the local economy. Based upon this assessment, it is easy to see the high value-adding jobs. The table below demonstrates that while Dubbo has considerable employment in the retail trade and accommodation and food services sector these jobs represent less value to the overall economy when compared to the industrial sector (manufacturing, wholesale trade, transport, postal & warehousing) and the business services sector (finance & insurance).

Table 4.2. Value of Employment, 2008-09

Description	Dubbo	Orana Region	NSW
Agriculture, forestry and fishing	\$94,779	\$94,078	\$70,682
Mining	\$473,424	\$485,932	\$397,749
Manufacturing	\$114,531	\$118,022	\$120,744
Electricity, gas, water and waste services	\$237,109	\$238,938	\$214,144
Construction	\$146,041	\$147,766	\$100,340
Wholesale trade	\$149,323	\$150,549	\$143,757
Retail trade	\$55,092	\$55,812	\$47,720
Accommodation and food services	\$48,648	\$49,296	\$42,329
Transport, postal and warehousing	\$135,919	\$137,357	\$125,712
Information media and telecommunications	\$201,675	\$203,468	\$211,364
Financial and insurance services	\$328,859	\$331,007	\$359,925
Rental, hiring and real estate services	\$201,566	\$204,750	\$192,942
Professional, scientific and technical services	\$92,059	\$93,442	\$100,840
Administrative and support services	\$119,853	\$119,887	\$113,803
Public administration and safety	\$108,450	\$107,730	\$93,102
Education and training	\$78,855	\$78,863	\$64,504
Health care and social assistance	\$73,253	\$73,435	\$63,952

Description	Dubbo	Orana Region	NSW
Arts and recreation services	\$90,907	\$90,985	\$76,321
Other services	\$64,492	\$65,237	\$55,625

Source: AECgroup (2010)

4.3 Business Numbers

The 2007 business count by industry indicates that there were **3,516 businesses located within Dubbo** with the majority of these being from the sectors of:

- Agriculture, forestry & fishing (18.0%);
- Property & business services (16.9%);
- Construction (16.4%); and
- Retail trade (13.3%).

Table 4.3. Business Counts, 2007

Description	Dubbo	Orana Region
Agriculture, forestry and fishing	633	5,130
Mining	6	159
Manufacturing	204	474
Electricity, gas & water supply	0	12
Construction	576	1,368
Wholesale trade	147	426
Retail trade	468	1,272
Accommodation, cafes & restaurants	108	465
Transport & Storage	213	660
Communication Services	33	93
Financial and insurance services	159	369
Property & Business Services	594	1,452
Education	21	36
Health & Community Services	168	384
Cultural & Recreational Services	63	183
Personal & Other Services	123	273
Total	3,516	12,756

Source: ABS (2007b)

4.4 Key Industry

Dubbo's key industry sectors include:

- Construction;
- Health care & social assistance;
- Manufacturing;
- Education & training;
- Retail trade;
- Agriculture; and
- Tourism.

4.4.1 Construction

Dubbo has a strong construction sector through the presence of a number of construction companies which operate Australia wide. Local construction activity has mainly consisted of non-residential, infrastructure and commercial upgrades over the past year.

Dubbo has almost half of all construction businesses located in the Orana Region, representing 16.4% of Dubbo’s business share across all industries. Construction employees in Dubbo are primarily engaged in building construction (32.6%), installation trade services (21.9%) and building completion services (15.6%).

Construction sector industry value add was approximately 11.3% of GVA in 2008-09, equivalent to \$191.2 million for the sector and well above the percentage contribution in the Orana and New South Wales.

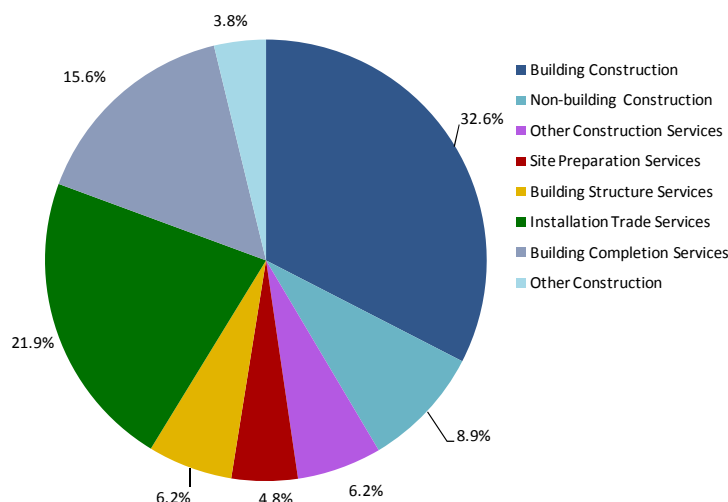
The strength of the sector in Dubbo has been largely driven by regional investment by business, industry and government in infrastructure and non-residential building but also through the presence of successful construction companies (residential and non-residential) which are located within Dubbo but operate Australia wide. Examples include Rawson Constructions and David Payne Constructions, which specialise in residential and commercial developments, respectively.

Table 4.4. Construction Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	1,309	2,746	261,233
% Industry Employment	6.2%	5.0%	7.2%
Industry Value Add			
Value Add (\$'M) (2008-09)	\$191.2	\$405.8	\$26,212.0
% of GVA	11.3%	8.7%	7.7%
Value of Employment			
\$ per Employee	\$146,041	\$147,766	\$100,340
Business			
No. of Businesses (2007)	576	1,368	n.a.
% of Businesses	16.4%	10.7%	n.a.

Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.3: Construction Employment Summary



Source: ABS (2007a)

4.4.2 Health Care & Social Assistance

Health care and social assistance is one of Dubbo’s leading sectors, employing over 14% of Dubbo’s workforce in health related industry. Dubbo is a strategically placed health care provider to the broader Orana and north western region with major public and private hospitals and allied health services.

Dubbo also plays a major part in training of rural health professionals through its linkages with the Sydney University’s School of Rural health and provision of health training through Dubbo’s Charles Sturt University Campus.

Health care & social assistance employs over 14% of workers in Dubbo and produced an estimated \$187 million in industry value add for Dubbo, 9% of the total GVA. Health care is a proportionally strong industry in Dubbo, with each worker producing an estimated \$73,000, compared to workers in the State who produced significantly less on average than their Dubbo and Orana Region counterparts. Employment in the sector is dominated by hospitals and nursing homes, which employ almost half of all health workers in Dubbo.

Dubbo’s key health assets include the Dubbo Base Hospital, Dubbo Private Hospital, the School of Rural Health and a number of allied health facilities.

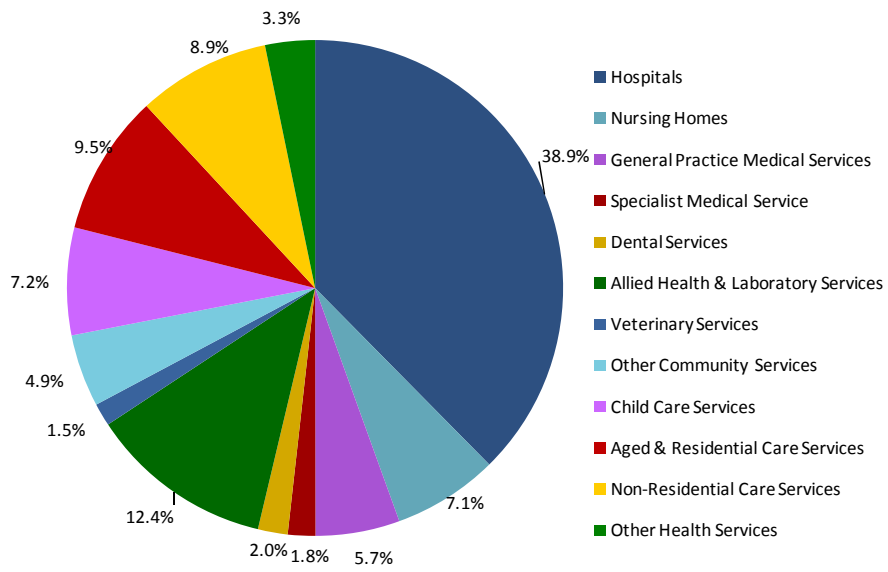
An ageing population in the Dubbo and Orana Region is expected to create strong demand of health care facilities and services, with over a quarter of the population expected to be aged 65 years and over by 2036.

Table 4.5. Health Care & Social Assistance Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	2,560	5,390	355,535
% Industry Employment	14.2%	11.5%	10.8%
Industry Value Add			
Value Add (\$’M) (2008-09)	\$187.5	\$395.8	\$22,737.0
% of GVA	11.1%	8.5%	6.6%
Value of Employment			
\$ per Employee	\$73,253	\$73,435	\$63,952
Business			
No. of Businesses (2007)	168	384	n.a.
% of Businesses	4.8%	3.0%	n.a.

Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.4: Health Care & Social Assistance Employment Summary



Source: ABS (2007a)

4.4.3 Manufacturing

Dubbo has an existing capability in food and beverage manufacturing, metal product manufacturing and specialised machinery and equipment manufacturing.

Food & beverage manufacturing is the leading manufacturing sector through the presence of Dubbo’s international meat exporter – Fletcher’s International Exports – a number of wineries, flour milling and pet food manufacturers. The strength of the sector draws from the strong regional agricultural base in Dubbo and the surrounding Orana Region.

The manufacturing industry contributed an estimated \$121.4 million in industry value add in 2008-09, making up almost 6% of Dubbo’s gross industry value add (GVA). The average manufacturing worker in Dubbo is estimated to produce over \$114,000, which is below the sector’s average across the Orana Region and the State.

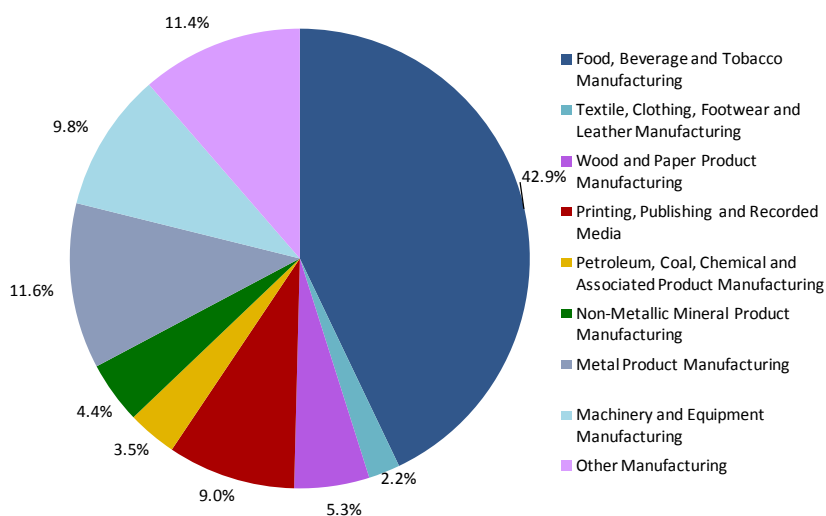
Food and beverage manufacturing is the primary manufacturing activity in Dubbo through the presence of an international meat exporter (lamb) – Fletchers International Exports Pty Ltd. Dubbo also has some other food and beverage manufacturing activity including pet food manufacture and flour milling.

Table 4.6. Manufacturing Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	1,060	2,097	287,964
% Industry Employment	7.8%	6.0%	9.8%
Industry Value Add			
Value Add (\$'M) (2008-09)	\$121.4	\$247.4	\$34,770.0
% of GVA	7.2%	5.3%	10.2%
Value of Employment			
\$ per Employee	\$114,531	\$118,022	\$120,744
Business			
No. of Businesses (2007)	204	474	n.a.
% of Businesses	5.8%	3.7%	n.a.

Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.5: Manufacturing Employment Summary



Source: ABS (2007a)

4.4.4 Education & Training

Dubbo provides a high standard of education and training across all levels of education including twelve primary schools, seven secondary schools, NSW western Institute of TAFE, Charles Sturt University and a number of other training services including the University of Sydney’s School of Rural Health and Dental Education Clinic.

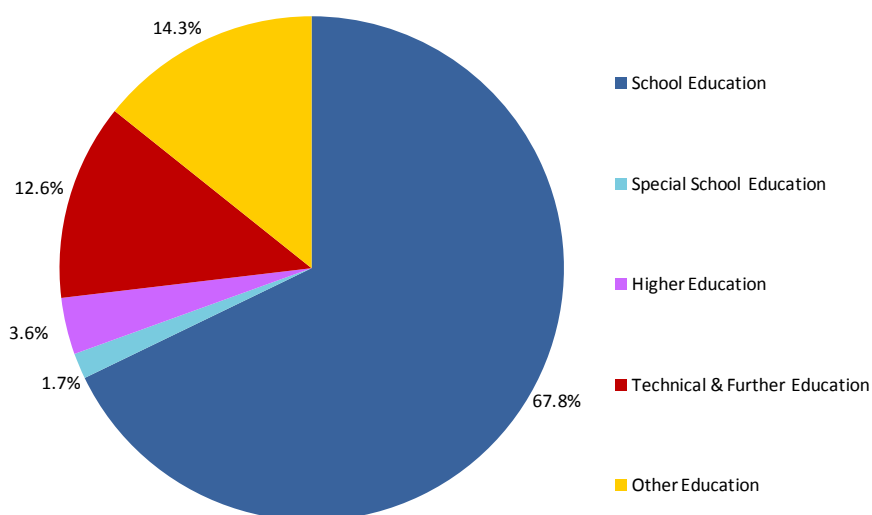
Education & training is a large employer in Dubbo, as indeed it is for the Orana Region generally when compared to the State. Education and training employs 9% of Dubbo’s workers and produced an estimated 5% of Dubbo’s GVA (\$115 million) with each worker producing almost \$80,000. The education and training sector in Dubbo is very competitive when compared to the Orana Region and State, illustrating Dubbo’s role as a regional centre for education. School and technical education make up the vast majority of jobs in the education and training sector in Dubbo, further bearing out this role.

Table 4.7. Education & Training Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	1,464	3,808	235,646
% Industry Employment	9.1%	9.2%	7.9%
Industry Value Add			
Value Add (\$’M) (2008-09)	\$115.5	\$300.3	\$15,200.0
% of GVA	6.8%	6.5%	4.4%
Value of Employment			
\$ per Employee	\$78,855	\$78,863	\$64,504
Business			
No. of Businesses (2007)	21	36	n.a.
% of Businesses	0.6%	0.3%	n.a.

Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.6: Education & Training Employment Summary



Source: ABS (2007a)

Over a third of Dubbo's population is enrolled as a student with most of these being primary (10.2%) or secondary (7.0%) students. Compared to the State, Dubbo has a higher proportion of school students and students attending TAFE which is reflective of the high proportion of persons under the age of 25 years which are living in the region.

Table 4.8. Student Enrolments, 2006

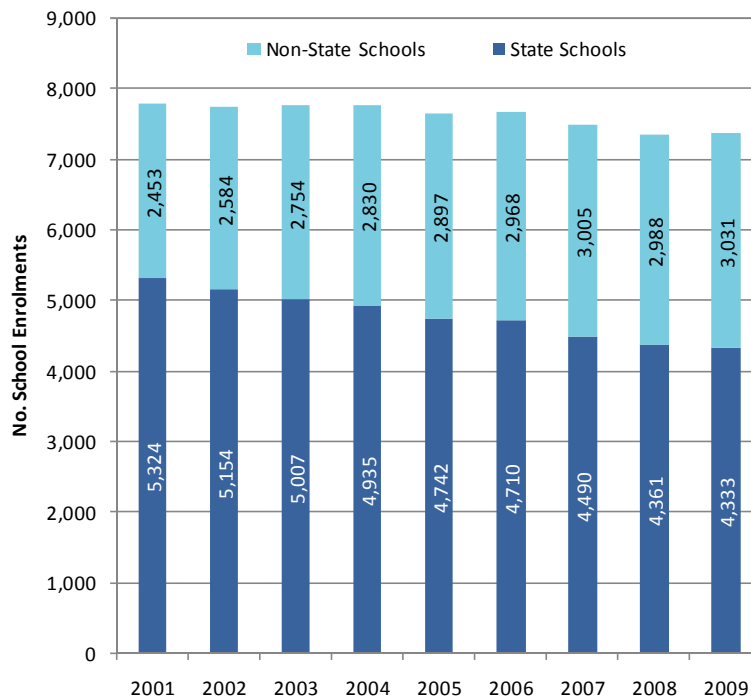
Description	Dubbo	Orana Region	NSW
Pre-school			
Total	1.9%	1.9%	1.7%
Primary			
Government	6.5%	6.8%	5.7%
Catholic	2.5%	2.6%	1.7%
Other Non Government	1.3%	0.7%	0.9%
<i>Total</i>	10.2%	10.0%	8.4%
Secondary			
Government	4.1%	5.0%	4.1%
Catholic	2.0%	1.1%	1.6%
Other Non Government	0.9%	0.5%	1.0%
<i>Total</i>	7.0%	6.6%	6.7%
TAFE or Further Education Institution			
Full Time	0.6%	0.4%	0.7%
Part Time	2.0%	1.9%	1.7%
Not Stated	0.0%	0.0%	0.0%
Total	2.6%	2.4%	2.5%
University or Other Tertiary Institution			
Full Time	0.9%	0.6%	2.4%
Part Time	0.9%	0.7%	1.2%
Not Stated	0.0%	0.0%	0.0%
Total	1.8%	1.3%	3.6%
Other Type of Educational Institution			
Full Time	0.1%	0.1%	0.2%
Part Time	0.3%	0.2%	0.5%
Not Stated	0.0%	0.0%	0.0%
Total	0.4%	0.3%	0.6%
Total Students (2006)	12,520	35,381	2,099,904
Not Attending	66.9%	69.1%	67.9%
Not Stated	9.1%	8.5%	8.5%
Total	100.0%	100.0%	100.0%
Total Population (2006)	37,844	114,631	6,549,178

Source: ABS (2007a)

Schooling is the largest enrolment share in Dubbo with over 7,360 school students enrolled in 2009. Dubbo school enrolments have declined over the past five years by 5.1% per annum which is reflective of decreasing birth rates and a slowdown in the number of young families moving to the region.

Over the past two years, enrolments in non-state schools in Dubbo have grown by 1.5%, particularly in secondary schools (5.0%), which is in contrast to the general declining enrolments trend experienced by Dubbo. Similarly, retention rates show an increasing trend in student retention between year 10 and 11 highlighting a preference for secondary students to complete year 11 and year 12.

Figure 4.7: School Enrolments, Dubbo 2001-2009



Note: The above figure excludes specialty schools and distance education.
Source: NSW Department of Education & Training (2010)

Table 4.9. School Enrolments & Retention Rates, Dubbo 2009

Description	2008	2009	% Change
State Schools			
Primary	2,481	2,457	-1.0%
Secondary	1,880	1,876	-0.2%
Specialty	55	52	-5.5%
Total	4,416	4,385	-0.7%
Non-State Schools			
Primary	1,650	1,626	-1.5%
Secondary	1,338	1,405	5.0%
Total	2,988	3,031	1.5%
Retention Rates			
Yr 9 to 10	91.3%	91.3%	0.1%
Yr 10 to 11	86.4%	95.7%	9.3%
Yr 11 to 12	89.2%	88.8%	-0.3%

Source: NSW Department of Education & Training (2010)

4.4.5 Retail Trade

Dubbo is a strong retail centre which employs 14% of the Dubbo’s industry employed and services the broader Orana region through the provision of a range of retail goods and services and a number of specialty stores in the Dubbo CBD and Orana Mall.

Retail trade in Dubbo employs around 14% of workers in the area and produces over 5% of GVA, with each worker producing around \$55,000. Food retailing employs just under a third of workers in retail, but personal and household good retailing is the largest employer, employing over 40% of retail workers. Retail trade in Dubbo employs proportionally more workers than in the Orana Region and the State, with those workers producing significantly more on average than the State.

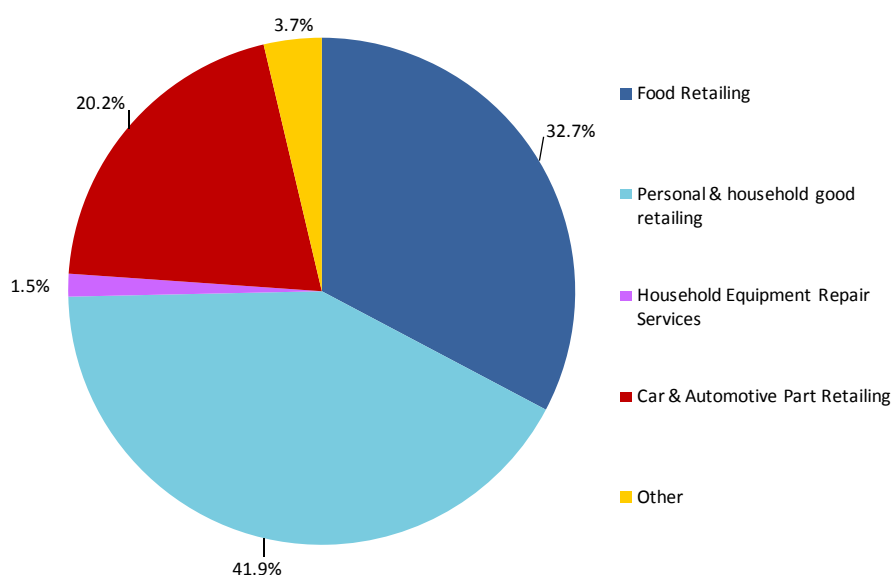
Dubbo has a number of retail areas including the Dubbo CBD (Macquarie Street) and Orana Mall. Orana Mall is currently undergoing a \$16 million redevelopment which will add an additional 3,600 square metres of retail space to the centre.

Table 4.10. Retail Trade Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	2,072	4,538	346,208
% Industry Employment	14.3%	12.1%	11.5%
Industry Value Add			
Value Add (\$'M) (2008-09)	\$114.1	\$253.3	\$16,521.0
% of GVA	6.8%	5.4%	4.8%
Value of Employment			
\$ per Employee	\$55,092	\$55,812	\$47,720
Business			
No. of Businesses (2007)	468	1,272	n.a.
% of Businesses	13.3%	10.0%	n.a.

Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.8: Retail Trade Employment Summary



Source: ABS (2007a)

4.4.6 Agriculture

Dubbo is a major agriculture production area that engages in a high level of grain, sheep and beef-cattle farming activity. Dubbo acts as the Orana Region’s agricultural industry service centre through the provision of a wide range of agricultural services, livestock markets and supply chain businesses.

Dubbo’s agriculture sector is primarily engaged in grain, sheep and beef-cattle farming, which collectively employ three quarters of Dubbo’s agricultural employees.

Dubbo also functions as a major agricultural service centre for the broader Orana agricultural area through the provision of number of agricultural services, suppliers and assets, such as the showgrounds, livestock markets and a prominent abattoir – Fletchers International Exports Pty Ltd. Services to agriculture is the second largest agricultural employer in the region, highlighting Dubbo’s role as agricultural service provider to the broader Orana region.

The ABS agricultural census indicated that the broader Orana region produced \$1.3 billion in broadacre, livestock and horticultural products in 2008-09, 14.4% of New South Wales value of production for agriculture (ABS, 2010d). Of this, the largest value of production in the Orana region was for broadacre cereal crops (52.9%), cattle production (16.7%) and wool production (9.4%).

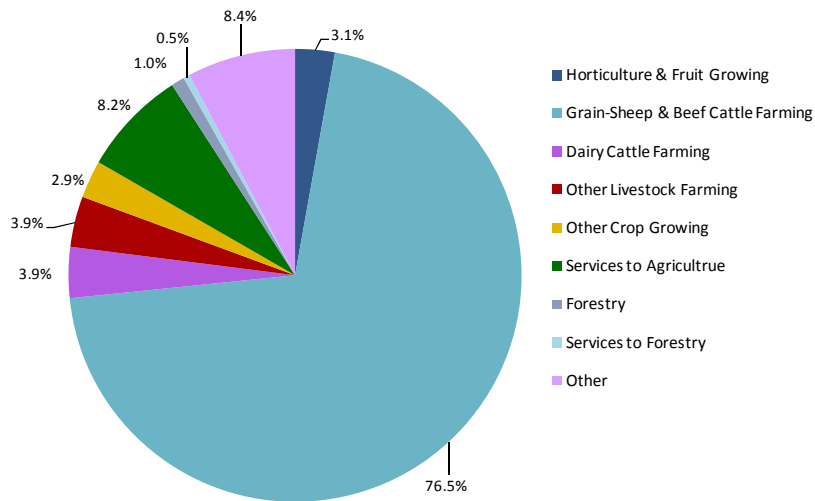
In 2008-09, agriculture contributed \$43.7 million in industry value add to the Dubbo economy, 2.1% of Dubbo’s GVA with the average dollar per employee being estimated to be almost \$95,000. This is above the average value per employee for the sector in the Orana Region and the State and highlights the strength and efficiency of the agriculture sector in the region and can also be attributed to the size of services to agriculture sector when compared to the surrounding region.

Table 4.11. Agriculture Summary

Description	Dubbo	Orana Region	NSW
Employed			
No. of Employees	461	5,063	86,147
% Industry Employment	3.8%	16.4%	2.8%
Industry Value Add			
Value Add (\$'M) (2008-09)	\$43.7	\$476.3	\$6,089.0
% of GVA	2.6%	10.2%	1.8%
Value of Employment			
\$ per Employee	\$94,779	\$94,078	\$70,682
Business			
No. of Businesses (2007)	633	5,130	n.a.
% of Businesses	18.0%	40.2%	n.a.

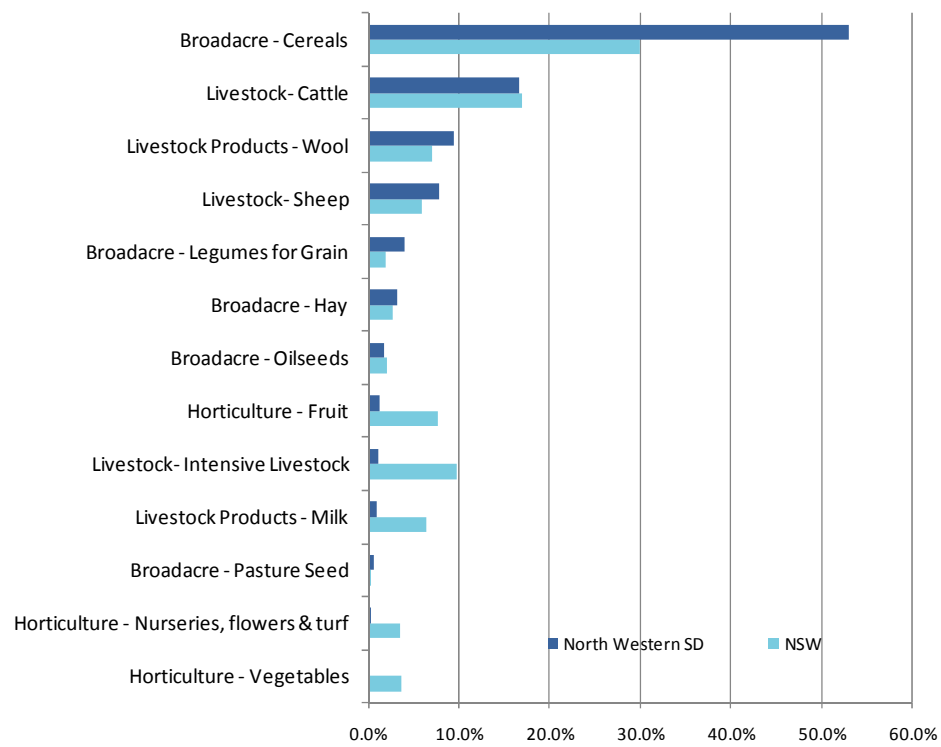
Source: ABS (2007a), ABS (2007b), AECgroup

Figure 4.9: Agriculture Employment Summary



Source: ABS (2007a)

Figure 4.10: Value of Agriculture Production, 2008-09



Source: ABS (2010d)

4.4.7 Tourism

Dubbo has a strong and established tourism sector, based upon a variety of options ranging from the zoo and nature based, eco, food & wine experiences to agriculture & heritage, sporting and events tourism markets.

The strength of Dubbo's tourism sector is evidence by growth in accommodation demand in the region and visitor spending over the past year.

4.4.7.1 Attractions & Target Markets

The Dubbo Visitor Profile and Satisfaction Report (TRA, 2007) highlighted that the top reason for visiting Dubbo in 2007 was to visit the Western Plains Zoo (70%). The Western Plains Zoo in Dubbo City is a regional icon that draws approximately 220,000 visitors to the region each year. The Zoo complements Sydney's Taronga Park Zoo and allows for a variety of plains dwelling animals to be catered for, making it a unique zoo that is constructed on an open range principal. It also has a variety of attached facilities open to the public, including gift shop and café/restaurant and is estimated to contribute over \$12.2 million (direct) each year to the broader community in addition to capital works and maintenance to the facility.

As the only Zoo of its kind in Regional New South Wales, the Western Plains Zoo is able to draw the highly exclusive **zoo tourism market**, which is estimated to contribute over \$358 million to the Australian tourism market each year (excluding capital expenditure).

Nature tourism is also another major drawcard for the region with 64% of visitors expecting to engage in nature based experiences. Specific nature based experiences that Dubbo and the surrounding region include:

- 71 hectares of City Parklands and nature reserves, which offer plenty of bushwalking and bird watching opportunities;
- Dubbo's biodiversity garden;
- Elston Park Water Feature;
- Macquarie River Canoe and Kayak trail;
- Shoyoen Sister City Garden; and
- Tracker Riley Cycle Way.

43% of visitors that engaged in nature tourism activities had 'better than expected' experiences in Dubbo, highlighting a high quality of nature experiences available in the Dubbo region. This is a significant target market in the scheme of overall Australian tourism market representing 27% of total tourism expenditure, and is a market that is yet to realise its full potential in the Dubbo area.

Building on the region's existing nature tourism capability, **eco-tourism** has become an emerging market in Dubbo and regional areas of New South Wales. Ecotourism is a recognised and accredited industry within Australia that is now being exported to the world as the International Ecotourism Standard. Accreditation provides industry, local communities and travellers with an assurance that an accredited product is backed by a commitment to best practice ecological sustainability, natural area management and the provision of quality ecotourism experiences (EcoTourism Australia, 2010). Dubbo is currently leading the way for Eco-Accredited Tourism in regional NSW through the provision of Eco-accreditation courses and training at Charles Sturt University Dubbo Campus and the presence of a number of Eco-accredited businesses, such as the Western Plains Zoo.

A range of **food & wine tourism** experiences are available in Dubbo and the surrounding region through the presence of a number of wineries and food events such as the Macquarie Valley Food & Wine Farmers markets, the Fresh Arts Feast Exhibition and the Multicultural Festival Dinner. As a large agricultural area there is scope to diversify agriculture production activities and the range of food & wine tourism experiences.

As a major service centre in north western NSW, Dubbo has developed a strength in **sports events tourism** through the provision of a number of major sporting facilities and events. Dubbo also has a number of attractions including the Old Dubbo Gaol and the Dubbo Observatory.

The recent development of the *Dubbo Regional Theatre & Convention Centre* has increased the region’s capability in attracting business conferences and functions to the region.

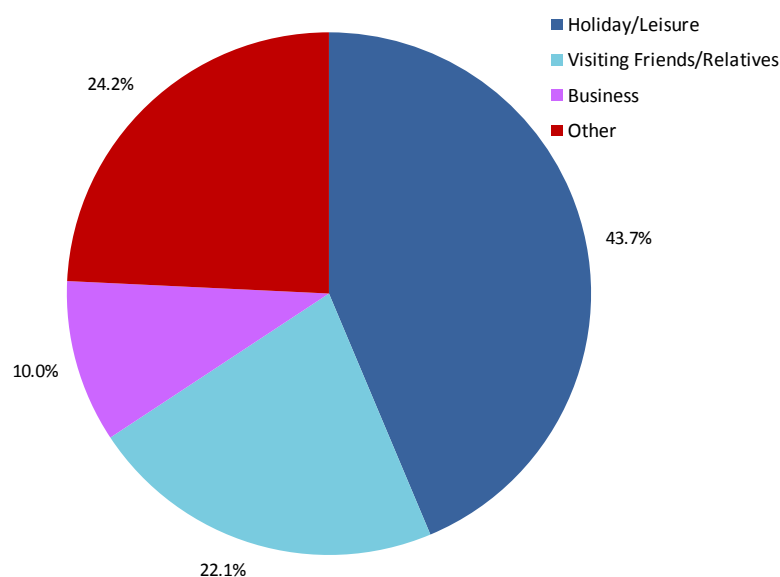
4.4.7.2 Visitor Profile

Over the year to June 2007, it was estimated that there were a total of 347,000 domestic day, 432,000 domestic overnight and 10,000 international visitors to the region. Over the same period it was estimated an average length of stay of 2.2 days and 9.6 days for domestic and international overnight visitors, respectively (TRA, 2007).

Average spend per trip per visitor type was estimated at \$298 for domestic overnight visitors (in 2007 dollars). Day trippers are expected to spend an average of \$217 in the region each visit, which is above the State average of \$99 per day visit (in 2007 dollars).

The most common purpose of visit to Dubbo is for holiday and leisure (43.7%) followed by other (24.2%) and visiting friends and relatives (22.1%). It is likely that the market share for business visitation to the region will increase over the next two years driven by conference tourism which will be hosted in the newly developed *Dubbo Regional Theatre & Convention Centre*.

Figure 4.11: Purpose of Visit, 2007



Source: TRA (2007)

4.4.7.3 Accommodation

Dubbo has a range of accommodation to service the local tourism market from three and four star motels/hotels to farmstay, zoofari accommodation and caravanpark and camping facilities. The demand and supply accommodation in Dubbo are presented below.

Visitation Demand

Compared to the wider Central NSW Tourism Region, Dubbo recorded higher occupancy rates and strong growth in room nights spent, guest arrivals and takings in accommodation between the March Quarter 2009 and March Quarter 2010. In the March Quarter of 2010, Dubbo had a total takings in accommodation of \$4.8 million for hotels, motels & serviced apartments, 9.2% more than the previous year which represents over a quarter of accommodation takings in the broader tourism region.

Takings for caravan park accommodation declined by 3.1% to \$0.7 million over the same period, representing almost 30% of regional caravan park accommodation activity.

Table 4.12. Tourism Accommodation Demand, Dubbo

Description	Dubbo		Central NSW Tourism Region		Dubbo as % of Tourism Region
	Mar Q 10	% Annual Change	Mar Q 10	% Annual Change	
Hotels, Motels & Serviced Apartments					
Room Occupancy Rate (%)	52.6%	2.9%	48.0%	0.5%	n.a.
Room Nights	48,658	7.2%	193,519	4.1%	25.1%
Guest Nights	83,068	2.4%	319,558	4.3%	26.0%
Guest Arrivals	57,505	1.3%	208,771	3.3%	27.5%
Average Stay (nights)	1.4	0.0%	1.5	0.0%	n.a.
Takings from Accommodation (\$)	\$4,826,313	9.2%	\$19,133,068	6.5%	25.2%
Takings per room night occupied (\$)	\$99	1.8%	\$99	2.3%	n.a.
Caravan Parks					
Site Nights Occupied	13,964	-5.2%	118,971	5.3%	11.7%
Site Occupancy (%)	34.3%	-0.7%	42.2%	3.8%	n.a.
Takings from Accommodation (\$)	\$747,000	-3.1%	\$2,499,000	4.3%	29.9%
Takings per site night occupied (\$)	\$53	2.2%	\$21	-1.0%	n.a.

Source: ABS (2010c)

Available Supply

In March Quarter 2010, Dubbo recorded a total of 37 hotels, motels and serviced apartments (with 5 or more rooms) and 5 caravan parks in Dubbo representing almost a fifth of all accommodation establishments in the broader Tourism Region.

Over the past year hotel, motel & serviced apartment guest room supply has increased slightly to 1,027 rooms despite larger increases in supply in the wider tourism region of 139 rooms.

In contrast, caravan park capacity has declined by 3.2% to 453 sites as per the regional trends which declined over the same period by 4.0% over the same period.

Table 4.13. Tourism Accommodation Supply, Dubbo

Description	Dubbo		Central NSW Tourism Region		Dubbo as % of Tourism Region
	Mar Q 10	% Annual Change	Mar Q 10	% Annual Change	
Hotels, Motels & Serviced Apartments					
Establishments	37	0.0%	190	1.1%	19.5%
Guest Rooms	1,027	1.2%	4,493	3.2%	22.9%
Bed Spaces	3,138	0.2%	12,880	1.0%	24.4%
Employment	287	12.5%	1,296	2.4%	22.1%
Caravan Parks					
Establishments	5	0.0%	28	-6.7%	17.9%
Total Capacity	453	-3.2%	3,135	-4.0%	14.4%
Employment	38	5.6%	155	-4.9%	24.5%

Source: ABS (2010c)

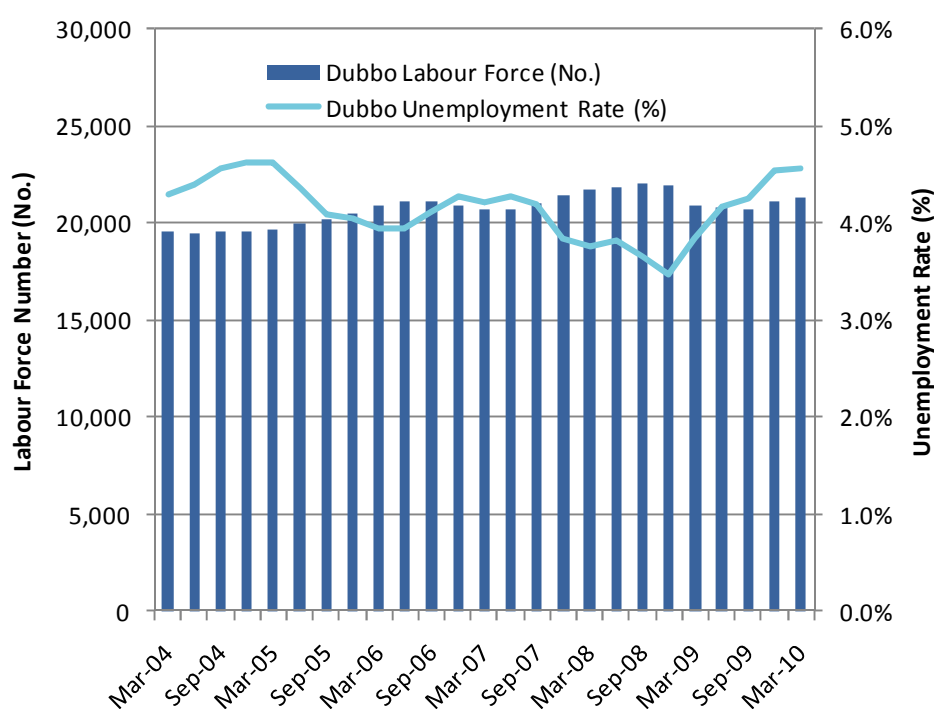
5. Labour Market & Employment Characteristics

5.1 Labour Force

Dubbo’s labour force has fluctuated between 19,714 and 22,064 (by approximately 2,350 persons) over the past five years and was estimated to be 21,281 persons in March Quarter 2010. Over the same period, the unemployment rate rose to 4.6%, 0.7 percentage points higher than the previous year.

Despite this rise in unemployment, **Dubbo’s unemployment rate remains well below those recorded for the Orana Region and the State**, highlighting the relative strength of Dubbo’s economy in the wake of the GFC.

Figure 5.1: Labour Force & Unemployment, Dubbo 2003-09



Source: DEEWR (2010)

Table 5.1: Labour Force & Employment, 2005 to 2010

Description	March Qtr 2010	Annual % Change 2009 to 2010	Five Year Average Annual % Change
Dubbo			
Labour Force	21,281	1.7%	1.5%
Employment	20,311	1.0%	1.6%
No of unemployed	970	20.5%	1.3%
Unemployment Rate ^a	4.6%	0.7%	0.0%
Orana Region			
Labour Force	60,933	1.6%	0.7%
Employment	56,990	0.3%	0.6%
No of unemployed	3,943	24.1%	1.3%
Unemployment Rate ^a	6.5%	1.2%	0.0%
New South Wales			
Labour Force	3,628,600	7.5%	1.5%
Employment	3,414,700	6.8%	1.3%
No of unemployed	213,900	18.5%	3.5%
Unemployment Rate ^a	5.9%	0.5%	0.1%

Note: % annual change in unemployment rates are a percentage point change.
Source: DEEWR (2010)

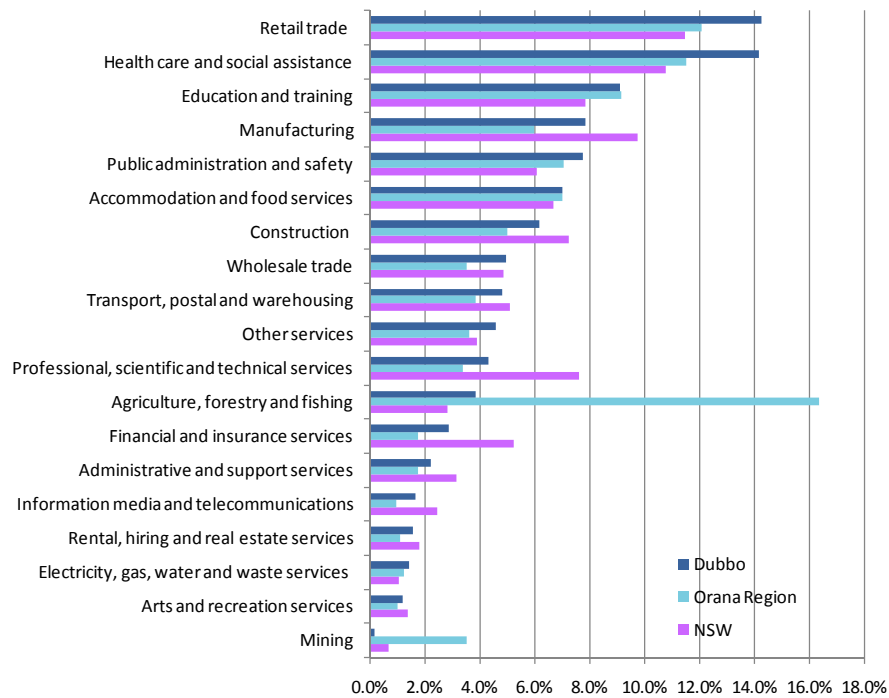
5.2 Employment by Industry

The key employers in Dubbo are mainly serviced based industries including retail trade, health care & social assistance and education & training. Manufacturing is also a leading employment sector, however the proportion of employees in manufacturing is well below that of the State.

Dubbo also has a higher proportion of persons employed in public administration & safety when compared to the Orana Region and the State, highlighting Dubbo's role as a key service centre within the Orana Region and the presence of government, emergency and safety services operations.

Agriculture and mining are key industries of employment for the wider Orana region but less important in Dubbo, however, Dubbo has the capacity to act as a supporting service centre to these sectors in the region through the provision of agriculture and mining services and associated supply chain industries which are located in Dubbo.

Figure 5.2: Employment by Industry, 2006 (Place of Work)



Source: ABS (2007a)

Table 5.2: Employment by Industry, 2006 (Place of Work)

Industry	Dubbo	Narromine	Gilgandra	Parkes	Forbes	Orana Region	NSW
Agriculture, forestry & fishing	3.8%	35.3%	28.9%	15.6%	19.6%	16.4%	2.8%
Mining	0.2%	0.0%	0.0%	5.7%	0.4%	3.5%	0.7%
Manufacturing	7.8%	4.6%	2.5%	4.6%	7.4%	6.0%	9.8%
Electricity, gas, water & waste services	1.4%	1.7%	1.2%	1.1%	1.1%	1.3%	1.0%
Construction	6.2%	3.3%	2.9%	4.6%	5.3%	5.0%	7.2%
Wholesale trade	5.0%	3.7%	2.2%	2.7%	4.5%	3.5%	4.9%
Retail trade	14.3%	8.5%	12.4%	13.8%	11.5%	12.1%	11.5%
Accommodation & food services	7.0%	5.1%	7.9%	8.0%	6.3%	7.0%	6.7%
Transport, postal & warehousing	4.8%	5.1%	4.4%	5.9%	3.3%	3.9%	5.1%
Information media & telecommunications	1.7%	0.2%	0.5%	0.6%	0.5%	1.0%	2.5%
Financial & insurance services	2.9%	1.7%	1.3%	1.6%	2.1%	1.7%	5.2%
Rental, hiring & real estate services	1.6%	0.8%	0.4%	1.0%	1.0%	1.1%	1.8%
Professional, scientific & technical services	4.3%	2.4%	1.6%	2.4%	3.6%	3.4%	7.6%
Administrative & support services	2.2%	0.8%	0.7%	1.5%	1.9%	1.7%	3.2%
Public administration & safety	7.8%	5.2%	6.9%	7.1%	5.0%	7.1%	6.1%
Education & training	9.1%	9.0%	8.6%	7.9%	9.5%	9.2%	7.9%
Health care & social assistance	14.2%	9.1%	11.9%	11.2%	12.3%	11.5%	10.8%
Arts & recreation services	1.2%	0.6%	1.7%	0.6%	0.4%	1.0%	1.4%
Other services	4.6%	2.6%	3.9%	4.2%	4.6%	3.6%	3.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

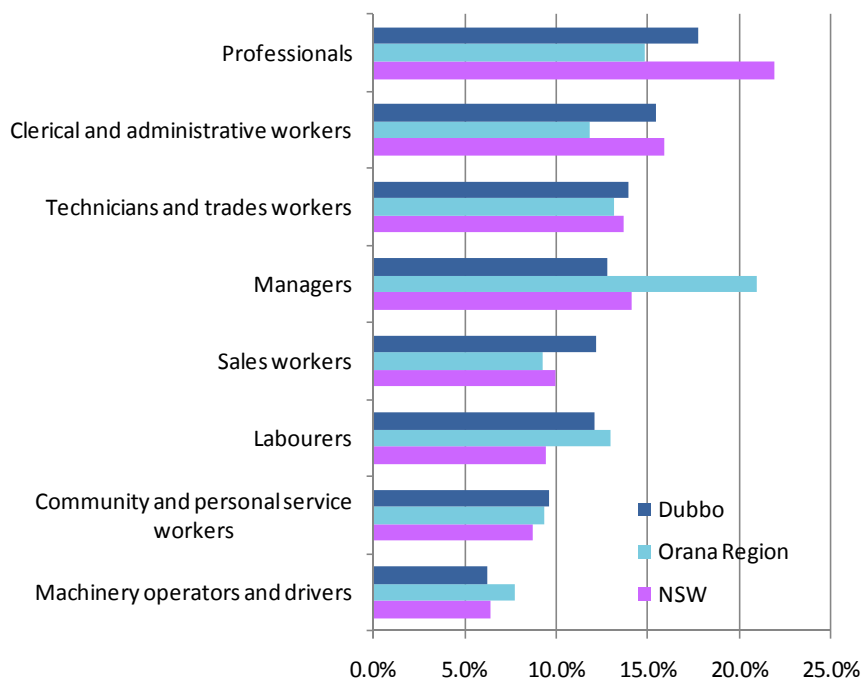
Source: ABS (2007a)

5.3 Employment by Occupation

Dubbo has a high proportion of professionals and clerical and administrative workers which is consistent with its position as a major service centre in the Orana Region. There is also a high proportion of technicians and trades workers located in Dubbo compared to the wider Orana Region, which are also highly skilled positions.

The Orana Region generally has a higher proportion of managers when compared to the State which is likely due to the high proportion of farmers and owner-operator types of businesses located in regional New South Wales.

Figure 5.3: Employment by Occupation, 2006 (Place of Work)



Source: ABS (2007a)

Table 5.3: Employment by Occupation, 2006 (Place of Work)

Occupation	Dubbo	Narromine	Gilgandra	Parkes	Forbes	Orana Region	NSW
Managers	12.8%	30.8%	31.4%	22.7%	22.9%	20.9%	14.1%
Professionals	17.7%	11.9%	12.3%	13.3%	14.5%	14.8%	21.9%
Technicians and trades workers	13.9%	12.4%	10.4%	13.8%	12.9%	13.2%	13.6%
Community & personal service workers	9.6%	8.0%	10.4%	9.8%	9.0%	9.3%	8.7%
Clerical & administrative workers	15.4%	9.6%	8.3%	12.5%	12.0%	11.8%	15.9%
Sales workers	12.1%	6.8%	9.2%	9.6%	9.1%	9.2%	9.9%
Machinery operators and drivers	6.2%	6.5%	5.3%	8.6%	6.2%	7.7%	6.4%
Labourers	12.1%	13.9%	12.7%	9.6%	13.5%	13.0%	9.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ABS (2007a)

5.4 Incomes by Industry

Average incomes are generally higher in Dubbo than for the remainder of the Orana Region with an average of \$753 per week in Dubbo, compared to \$713 for the Orana Region. However, average incomes in Dubbo are still well below the State average of \$864 per week. Key industries with higher paying wages are mining, electricity, gas, water & waste services and public administration & safety.

Table 5.4: Average Incomes by Industry, 2006

Industry	Dubbo	Narromine	Gilgandra	Parkes	Forbes	Orana Region	NSW
Agriculture, forestry & fishing	\$649	\$659	\$616	\$489	\$565	\$607	\$620
Mining	\$1,219	\$1,165	\$1,150	\$1,319	\$1,134	\$1,367	\$1,500
Manufacturing	\$703	\$639	\$461	\$731	\$657	\$683	\$900
Electricity, gas, water & waste services	\$1,146	\$741	\$889	\$1,077	\$1,106	\$1,015	\$1,191
Construction	\$768	\$686	\$748	\$725	\$726	\$741	\$880
Wholesale trade	\$774	\$649	\$677	\$754	\$736	\$764	\$947
Retail trade	\$536	\$460	\$404	\$491	\$553	\$510	\$558
Accommodation & food services	\$422	\$388	\$463	\$396	\$377	\$443	\$482
Transport, postal & warehousing	\$814	\$737	\$794	\$862	\$637	\$742	\$921
Information media & telecommunications	\$872	\$691	\$559	\$692	\$593	\$829	\$1,113
Financial & insurance services	\$997	\$630	\$531	\$647	\$826	\$874	\$1,229
Rental, hiring & real estate services	\$803	\$621	\$517	\$692	\$655	\$750	\$930
Professional, scientific & technical services	\$886	\$671	\$541	\$859	\$827	\$829	\$1,155
Administrative & support services	\$585	\$425	\$553	\$564	\$548	\$518	\$750
Public administration & safety	\$1,061	\$905	\$860	\$1,048	\$868	\$958	\$1,074
Education & training	\$959	\$817	\$911	\$917	\$911	\$905	\$955
Health care & social assistance	\$800	\$679	\$664	\$661	\$664	\$736	\$826
Arts & recreation services	\$667	\$610	\$583	\$455	\$481	\$615	\$720
Other services	\$640	\$554	\$529	\$632	\$552	\$596	\$681
Inadequately described	\$690	\$479	\$517	\$584	\$481	\$546	\$846
Not stated	\$521	\$625	\$341	\$349	\$400	\$486	\$543
Total	\$753	\$658	\$635	\$700	\$654	\$713	\$864

Source: ABS (2007a)

5.5 Qualifications

Dubbo has a higher proportion of persons aged over 15 years with post-school qualifications than the surrounding townships of Narromine, Gilgandra, Parkes, Forbes and the Orana Region as a whole. Broadly speaking, the highest level of post-school qualification across the remainder of the Orana Region is at the Certificate level.

Dubbo has significant educational infrastructure to provide skilling across all post-school qualification levels through the campus for Charles Sturt University and the New South Wales Western Institute of TAFE, which each offers a range of courses and field types.

Table 5.5: Post-School Qualifications, 2006

Post-School Qualifications	Dubbo	Narromine	Gilgandra	Parkes	Forbes	Orana Region	NSW
Postgraduate Degree	1.0%	0.7%	0.5%	0.6%	0.7%	0.8%	3.1%
Grad. Dip. & Grad Cert.	1.2%	0.7%	0.5%	0.8%	0.9%	0.9%	1.3%
Bachelor Degree	7.8%	6.2%	5.6%	5.7%	6.0%	6.6%	12.1%
Advanced Dip/Dip	5.1%	4.9%	4.2%	4.4%	5.0%	4.9%	7.4%
Certificate	20.2%	17.1%	16.5%	19.5%	18.1%	18.4%	16.8%
Total Pop. Aged 15 Years & Over with Post-School Qualifications	35.2%	29.6%	27.3%	30.9%	30.6%	31.6%	40.7%

Source: ABS (2007a)

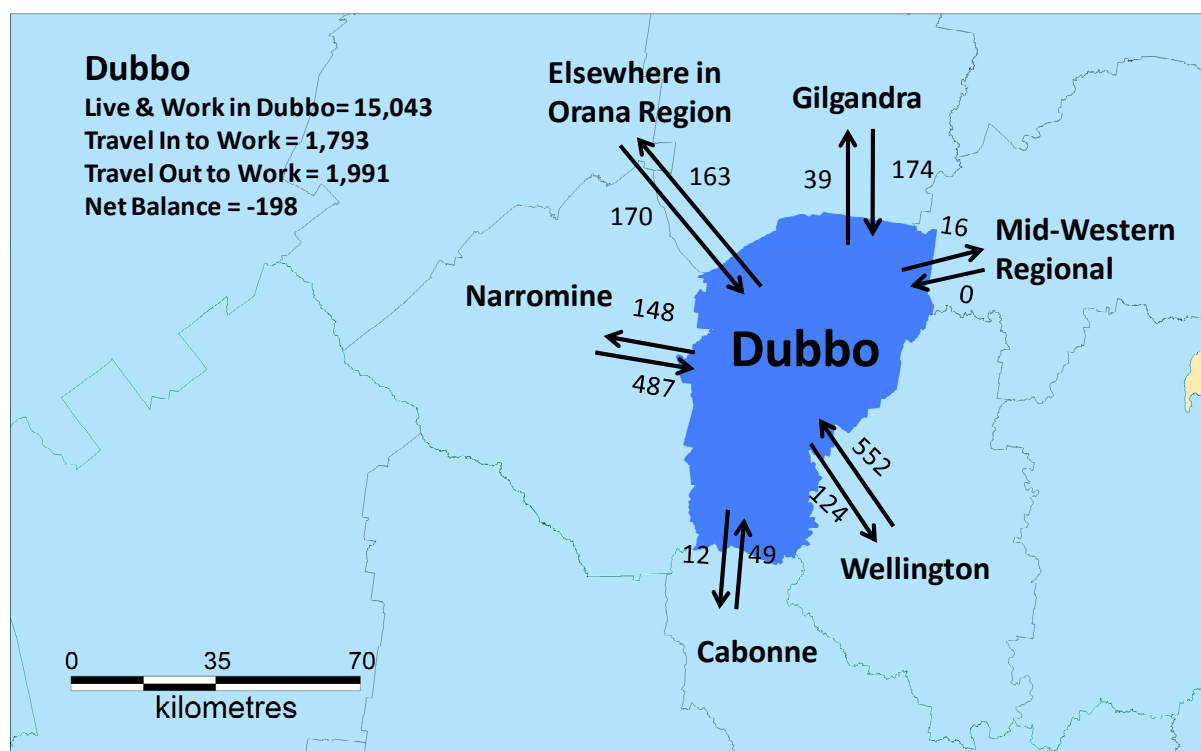
5.6 Journey to Work

ABS Census Journey to Work data has been analysed to track where workers live and work to establish the movements of Dubbo’s resident workforce. Overall, Dubbo records an outflow of almost 2,000 workers, or around 13% of its resident workforce, while over half the workers travelling to Dubbo for work come from Narromine and Wellington. On balance there is very little net movement of workers in or out of Dubbo, with a negligible amount of workers leaving Dubbo for work. This indicates a high level of self-containment in the Dubbo economy (88.3% of resident workers retained within Dubbo).

A high self containment rate is better for a sustainable economy and yields many benefits including:

- Direct economic benefits with a high proportion of household spend (paid out in wages) retained within the local economy;
- Higher quality of life for workers through limited commutes and more time at home; and
- Cleaner environment due to limited travel.

Figure 5.4: Journey to Work, All Industry 2006



Source: ABS (2007a)

6. Infrastructure

6.1 Transport Infrastructure

6.1.1 Road

Dubbo is located on the Newell Highway, five hours inland from Sydney CBD and 10 hours north and south of Melbourne and Brisbane, respectively and is a major freight route between Melbourne and Brisbane.

6.1.2 Air

Dubbo has a major regional airport with over 136 flights to and from Sydney each week, highlighting Dubbo as a major regional connection hub in New South Wales. To cater for increasing demand for air services in the region, the Dubbo City Regional Airport has experienced significant investment since 2006, including the re-development of the terminal building to increase handling capability to 250,000 passengers each year. The airport is also home to an Air Services Australia Workshop and a Royal Flying Doctors Service facility.

6.1.3 Rail

Dubbo is located on the Main Western Line which extends from Sydney to Cobar some 300 kilometres further west of Dubbo. The Coonamble Branch of the NSW Railway also originates in Dubbo, extends to Coonamble (160 km north of Dubbo) and is used to carry seasonal grain loads.

The recent development of the privately owned Dubbo Rail and Depot on Boothenbar Road has markedly improved Dubbo's suitability as an investment location for industrial activities and the overall accessibility of the region. This rail infrastructure has been developed privately for the transport of meat, wool and wheat direct to Sydney for export, however, also presents many opportunities for other potential users willing to pay for the use of this important piece of infrastructure (ABC, 2009).

6.2 Utility Infrastructure

Dubbo is serviced by a variety of utility infrastructure, which currently provides for the needs of business and can support further growth.

- **Telecommunications:** Dubbo has ADSL internet coverage in the City areas and is yet to benefit from the National Broadband Network (NBN) rollout.
- **Water & Waste Water:** Dubbo City Council sources its potable water supply from the Macquarie River (contributing around 70%) and a total of seven bores within the South Dubbo borefield (contributing around 30%). The water from both sources is treated at the John Gilbert Water Treatment Plant in Macquarie Street before being pumped to service reservoirs throughout the urban area of Dubbo.

Dubbo City Council also provides sewerage services to the urban areas of Dubbo and the village of Brocklehurst. Council has recently developed sewage services to supply the village of Wongarbon.

- **Electricity:** Country Energy is the main supplier to the Dubbo and Orana Region.
- **Natural Gas:** Although not as large as the Queensland market, the northern NSW gas market is showing great promise with the development of a number of wells, pipelines and power stations across the Orana region. As such, Dubbo is well supplied by natural gas for residents and industry and also the main inception point for the recently constructed pipeline from Dubbo to Tamworth which supplies over 7,000 homes and businesses.

6.3 Community Infrastructure

There are a number of community assets that support the quality of life in Dubbo, which in turn supports economic development.

- **Health:** Dubbo has two major hospitals, Dubbo Base Hospital and Health Service and Dubbo Private Hospital. Dubbo has significant hospital infrastructure and care capacity in the Greater Western Health Service area. Redevelopment of the Dubbo Base Hospital is expected to occur over the next four years with over \$22 million in funding for the project committed by the State (Daily Liberal, 2010c).
- **Aged care:** As a major regional centre, Dubbo has a number of aged care facilities including five major nursing homes providing a range of care and at least one nursing home that has been approved for development over the next 12 months.
- **Education:** Dubbo has a number of high quality public and private schooling facilities, the Charles Sturt University and the New South Wales Western Institute of TAFE.
- **Recreation & Community Facilities:** Dubbo has numerous sporting and recreational facilities, including a range of sporting clubs and fields, the aquatic leisure centre, BMX track and skate park, Dubbo Regional Theatre and Convention Centre and the Western Plains Cultural Centre.
- **Western Plains Zoo:** The Western Plains Zoo in Dubbo City is a regional icon that draws visitors from all over New South Wales each year. The Zoo complements Sydney's Taronga Park Zoo and allows for a variety of plains dwelling animals to be catered for making it a unique zoo that is constructed on an open range principal. It also has a variety of attached facilities open to the public including gift shop and café/restaurant.
- **Retail Centre:** Dubbo has a strong retail centre, which services the broader Orana and North Western New South Wales Region. The Dubbo Business Centre and the Orana Mall are the major retail precincts within Dubbo City.
- **Western Plains Cultural Centre:** Dubbo's cultural centre comprises the Dubbo Regional Gallery, Dubbo Regional Museum and Community Arts Centre and is an \$8.2 million centre, which has contributed significantly to the Dubbo community and enhancement of regional quality of life.
- **BMX Track:** The Dubbo BMX Track is a relatively new track on the national BMX racing scene and is a valuable piece of community sporting infrastructure. BMX racing has been a recognised Olympic sport (since 2008) and will continue to grow its profile in Australia.
- **Skate Park:** Dubbo is home to a world-class skate park facility located in the Victoria Park Regional Action Sports Precinct and is designed to challenge and grow the skills of skaters as well as attract national and international athletes. This Skate Park was developed in 2008 and is considered a vital community sporting asset, particularly for its youth culture.

7. Property Market

7.1 Building Approvals

7.1.1 Residential

Dwelling approvals in Dubbo increased over the past three years by 41.8% to 268 approvals in the year ended June 2010. This is in contrast to the Orana Region which experienced declines in approvals of 9.8% over the same period. In the past year, Dubbo approvals increased by 25.8%.

This increase in residential building approvals activity resulted in a 38.2% increase the value of dwelling approvals in the Dubbo LGA over the past years to a total of \$69.1 million. This has resulted in a three year average growth of 66.8% in approval values, well above the three year average growth experienced by the Orana Region (10.3%) and the State (12.8%).

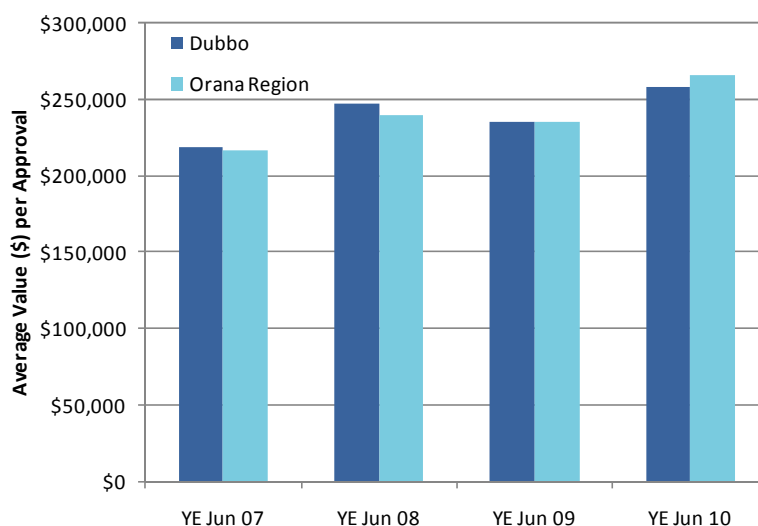
Table 7.1: Dwelling Approval Number & Value (\$'M), 2010

Area	Number of Approvals			Value of Approvals		
	YE Jun 10	% Annual Change	% 3-Year Change	YE Jun 10 (\$'M)	% Annual Change	% 3-Year Change
Dubbo	268	25.8%	41.8%	\$69.1	38.2%	66.8%
Narromine	4	-33.3%	-55.6%	\$1.2	-23.3%	-39.3%
Gilgandra	14	7.7%	40.0%	\$3.4	-13.8%	49.4%
Parkes	38	5.6%	-32.1%	\$10.2	3.4%	-36.2%
Forbes	18	260.0%	-35.7%	\$4.6	49.9%	-41.0%
Orana Region	412	22.6%	-9.8%	\$109.3	38.1%	10.3%
NSW	33,104	39.0%	5.8%	\$10,149.3	34.1%	12.8%

Source: ABS (2010b)

Average value per approvals in Dubbo have increased to over \$257,000 in the most recent year, slightly below the Orana region average of \$265,000 for the period. Over the past three years increases in approval values have average around 5.6% in Dubbo LGA and 7.0% for the broader Orana Region.

Figure 7.1: Average Value (\$) per Dwelling Approval, 2007-2010



Source: ABS (2010b)

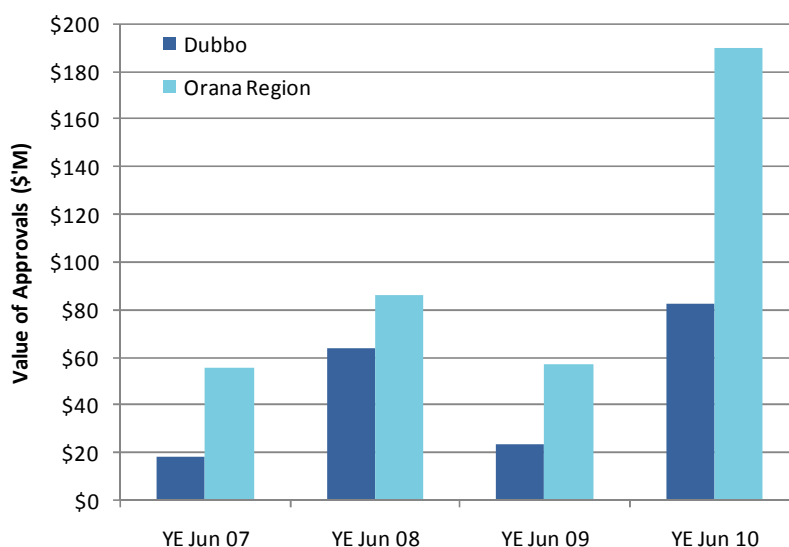
7.1.2 Non-Residential

After experiencing a decline in non-residential investment in 2009, Dubbo has experienced a boost in investment in the most recent year of almost 140% to \$82.4 million in the Year Ended June 2010. This represented approximately 45% of the Orana Region’s investment in non-residential building.

Key building approvals (either approved or in the approvals process) (Daily Liberal, 2010) include:

- Development and expansion of shopping centres in the east and west of Dubbo;
- Development of a number of medical facilities;
- Upgrade of the Western Institute of TAFE – Dubbo Campus; and
- Upgrade and maintenance on a number of school facilities across Dubbo.

Figure 7.2: Non-Residential Approval Value (\$'M), 2007-2010



Source: ABS (2010b)

Table 7.2: Non-Residential Approval Value (\$'M), 2010

Area	Value of Approvals		
	YE Jun 10 (\$'M)	% Annual Change	% 3-Year Change
Dubbo	\$82.4	256.0%	353.8%
Narromine	\$6.5	316.1%	272.8%
Gilgandra	\$8.7	252.0%	689.6%
Parkes	\$21.4	174.7%	235.8%
Forbes	\$7.9	-64.4%	114.7%
Orana Region	\$189.7	234.4%	243.5%
NSW	\$10,399.5	50.2%	30.9%

Source: ABS (2010b)

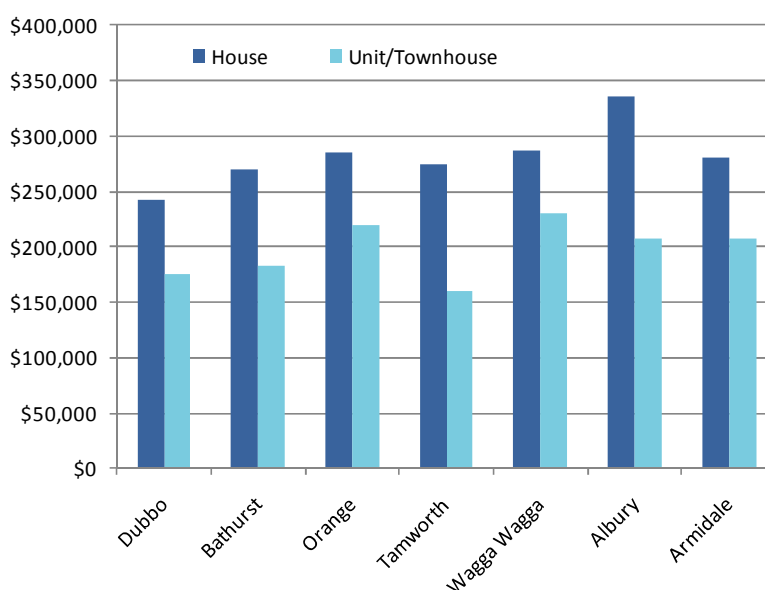
7.2 Property Sales

Dubbo has comparatively lower median property prices when compared to other regional cities in New South Wales. Growth in median property prices over the past 10 years has generally underperformed in Dubbo, due to a number of factors including slowing population growth, limited capacity of the local market to keep up with land and building costs and a lack of housing choice (REI NSW, 2010). Drought has also impacted Dubbo as a regional city by reducing the prosperity of rural industries and thereby impacting general business prosperity, job opportunities and overall performance of the economy.

In the year ended May 2010, Dubbo recorded the lowest median house price of \$242,000 compared to Bathurst, Orange, Tamworth, Wagga Wagga, Albury and Armidale. Dubbo also had the second lowest median unit/townhouse price of \$175,000 behind Tamworth.

Overall, Dubbo’s affordability of housing and general ‘liveability’ is a competitive advantage for attracting people and business to town.

Figure 7.3: Median Property Prices, Regional Cities NSW, 2009-10



Note: Median property prices are for the year ended May 2010.
Source: Australian Property Investor (2010)

Table 7.3: Median Property Prices, Dubbo

	House	Unit/Townhouse
Median Property Price 2009-10	\$242,000	\$175,000
% Annual Change	2.8%	-20.5%
% Five Year Change	3.3%	5.8%
% 10 Year Change	6.8%	6.1%

Source: Australian Property Investor (2010)

7.3 Industrial & Commercial Land Availability

The Dubbo Industrial Park, located off the Mitchell Highway, is one of Dubbo’s light industrial allotments of serviced vacant industrial land in Dubbo with 10 lots currently available for development. This industrial park is situated on the East to West freight route.

Blue Ridge Business Park is also located on the Mitchell Highway and provides a number of serviced industrial lots which have been on the market for the past 18 months. Lots are available from 955 square metres to 1.2 hectares and cater for commercial, bulky goods and trade/service buildings. A total of 21 lots are available for sale or lease. The new Bunning’s Super Store has recently located to Blue Ridge Park.

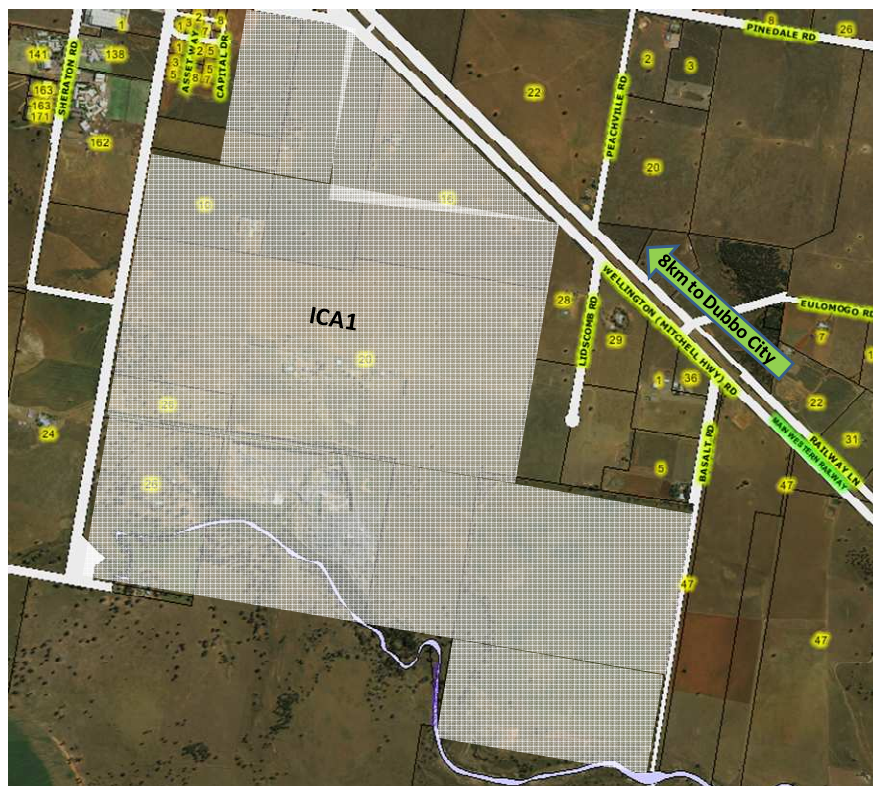
Moffat estate is another industrial estate in Dubbo, which is suitable for mixed use industrial activity and is situated on the North to South freight route at the junction of the Newell and Golden Highways. This is a fully serviced industrial area, which is strategically located on the Melbourne to Brisbane freight route.

Future industrial zones in the Dubbo City Council area are designated by Industrial Candidate Areas (ICA's) in and around the City. There are currently four ICA areas within the Dubbo LGA including:

ICA1: Mitchell/ Eulomogo

The Mitchell/ Eulomogo Industrial Candidate Area (ICA1) is located on the Mitchell Highway southeast of Dubbo City and is strategically located in proximity to the railway line. ICA1 has been zoned for Business Development, Business Park, light industrial and heavy industrial activity. There is a total of 347 hectares available for industrial park development. Minimum lot sizes for light and heavy industrial activity are currently zoned as 2,000 and 4,000 square metres respectively.

Figure 7.4: Industrial Candidate Areas to the Southeast of Dubbo City (ICA1)



Source: Dubbo City Council

ICA2: Mitchell/ Rosedale

The Mitchell/ Rosedal Industrial Candidate Area (ICA2) is located to the Northwest of Dubbo City on either side of the Mitchell Highway. ICA2 is one of the more strategically located lots being located in proximity to the airport and is zoned for light industrial and heavy industrial activity. Minimum lot sizes are 2,000 and 4,000 square metres, respectively. There is a total land area of over 140 hectares for mixed light and heavy industrial development.

Figure 7.5: Industrial Candidate Areas to the North West of Dubbo City (ICA2)



Source: Dubbo City Council

ICA3: Mendooran/ Talbragar

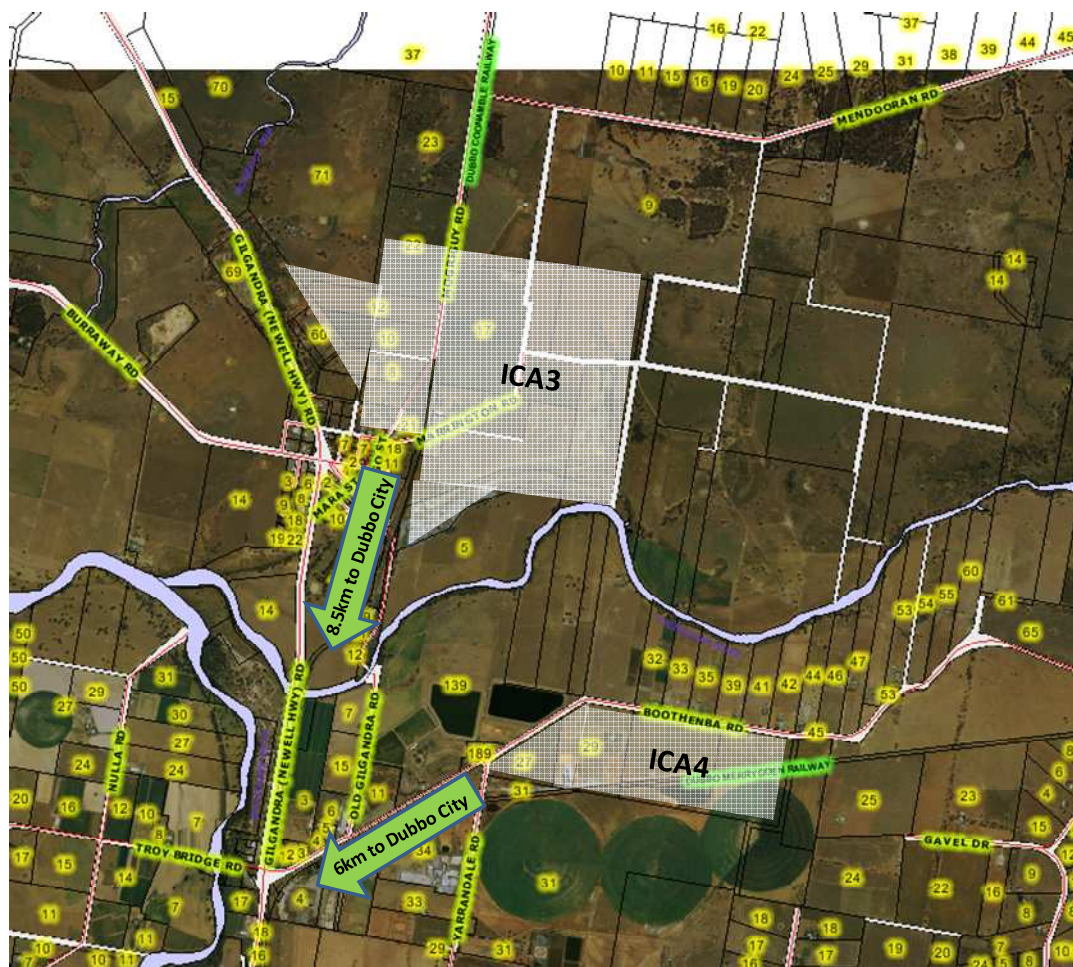
The Mendoran/ Talbragar Industrial Candidate Area (ICA3) is located to the North of Dubbo City on the Newell Highway and comprises zoned areas for light industrial and heavy industrial zones. Being close to existing residential there are also zones for public recreation and rural landscape to separate industrial zones from residential properties. ICA3 is in proximity to Boothenna Road which has existing light and heavy industrial activities. This site has been designed to cater for wet industries, such as food processing and waste industries.

Minimum lot sizes are 2,000 and 4,000 square metres, respectively. The rail corridor runs along the Newell Highway. ICA3 is one of the largest zoned areas for industrial use of all four candidate areas with over 430 hectares of zoned light and heavy industrial land.

ICA4: Yarrandale/ Boothenna

The Yarrandale/ Boothenna Industrial Candidate Area (ICA4) is located to the North of Dubbo City and is adjacent to existing industrial lands on Boothenna Road. This area is largely set aside for heavy industrial activities with a total of 125 hectares of land to be developed. These lots are already located in proximity to other heavy industry such as the abattoir and saleyards which are currently located on Boothenna Road. There is also proximity to Rail Corridor and Newell Highway. This zone is in proximity to some existing industry such as the Dubbo Regional Livestock Markets, Fletchers-International Abattoir and the recently developed rail depot (privately owned).

Figure 7.6: Industrial Candidate Areas to the North of Dubbo City (ICA3 and ICA4)



Source: Dubbo City Council

7.4 Housing Affordability

7.4.1 Home Ownership

The majority of households in Dubbo either fully own their home or are in the process of purchasing their home. Of these, Dubbo tends to have a slightly higher proportion of homes currently being purchased when compared to the wider Orana Region and the State. This is reflective of the higher proportion of younger working aged persons in the region which are likely to be in the process of purchasing their homes compared to the older State and regional populations.

The proportion of households renting in Dubbo is in line with the State trend of 29.5%.

Table 7.4: Home Ownership, 2006

Tenure Type/ Households	Dubbo	Narromine	Gilgandra	Parkes	Forbes	Orana Region	NSW
Fully Owned	32.1%	40.5%	45.5%	39.7%	41.1%	38.8%	34.8%
Being Purchased	34.7%	27.5%	24.0%	29.4%	27.4%	27.2%	31.9%
Renting	29.5%	28.0%	24.4%	26.9%	27.5%	29.2%	29.5%
Other	3.8%	4.0%	6.0%	3.9%	4.1%	4.7%	3.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
No. Households	13,077	2,400	1,651	5,382	3,549	41,697	2,328,218

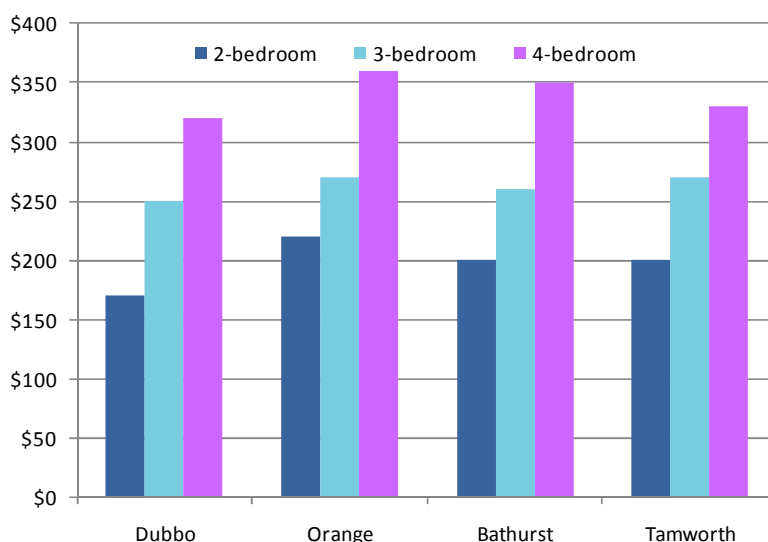
Source: ABS (2007a)

7.4.2 Rents

Compared to other regional cities in New South Wales such as Orange, Bathurst and Tamworth, Dubbo has comparatively lower weekly rents for 2-bed, 3-bed and 4-bed dwellings. In the year ended to June 2010, Dubbo recorded a median house price of \$170, \$250 and \$320 for 2-bed, 3-bed and 4-bed dwellings, respectively.

Rental bonds were approximately 3,405 in the year ended June 2010, almost 67% more than recorded 10 years previously.

Figure 7.7: Regional Cities, Median Rents 2010



Source: NSW Department of Housing (2010)

Table 7.5: Median Weekly Rents, YE Jun 2010

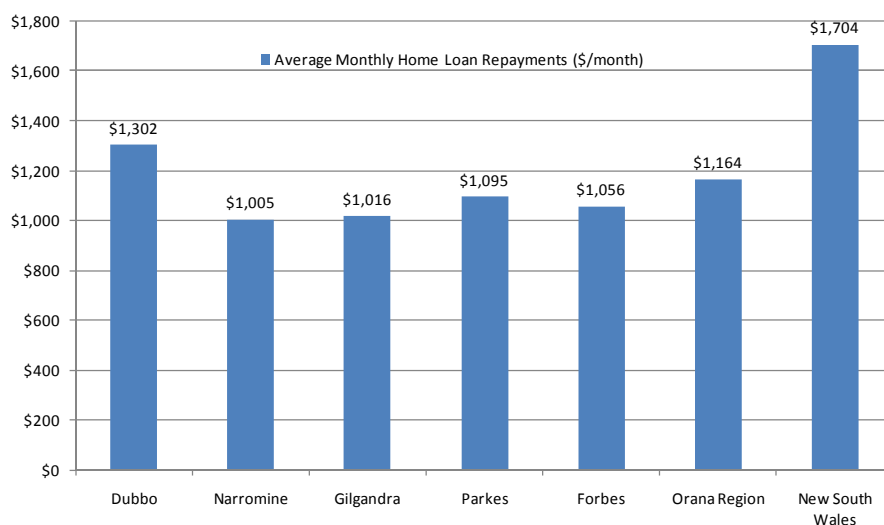
	2-Bed Dwelling	3-Bed Dwelling	4-Bed Dwelling
Median Rents			
Median Rent 2009-10	\$170	\$250	\$320
% 10 Year Change	32.8%	43.6%	74.8%
Rental Bonds			
No. Bonds	3,405		
% 10 Year Change	66.9%		

Source: NSW Department of Housing (2010)

7.4.3 Home Loan Repayments

Home loan repayments in Dubbo averaged \$1,302 per month for 2006, well above average home loan repayments in Narromine, Gilgandra, Forbes, Parkes and the Orana Region as a whole. Despite relatively high costs for housing in Dubbo compared to the Orana Region, costs of housing still remain well below the State level, highlighting that although Dubbo is relatively expensive in the regional context on a State level it is relatively affordable to live.

Figure 7.8: Average Monthly Home Loan Repayments (\$/month), 2006



Source: ABS (2007a)

7.5 Major Projects

In 2008-09, the Orana Region recorded over \$354 million in state significance project applications with the most notable of these being the Wellington gas fired power station application (\$350m) (NSW Planning, 2010b). Since then, the project application has been lodged for the development of the **Dubbo Zirconia mine project**, which is slated to be one of the world's largest zirconia and rare earth metals mining projects (DPI, 2010).

A number of other major project applications have also emerged in the Orana Region including a number of mines, resources and energy projects, transport and warehousing and community infrastructure.

Development of the region's mining, resources and energy projects will significantly boost Dubbo's role in regional mining activity with potential opportunities arising for mining supply chain businesses to operate out of Dubbo in the future.

Regional projects are listed in the sections below.

7.5.1 Major Projects in Dubbo

Mines, Resources & Energy

- **Dubbo Zirconia Mine Project:** The Dubbo Zirconia Mine Site sits above one of the worlds largest zirconium, yttrium and tantalum resources (+ 100 million tonnes) and also contains significant niobium and rare earth elements.
- **Cobbora Coal Project:** The proposed Cobbora Coal Project is an open cut coal mine at Cobbora in western NSW, about 22km south west of Dunedoo. If the project proceeds it is will cover 288 square kilometres and mine 30 million tonnes per annum run-of-mine coal. The majority of coal produced would be used in the State's power stations to generate electricity.

Community Infrastructure

- **Dubbo Base Hospital Re-development:** Redevelopment of the Dubbo Base Hospital is expected to occur over the next four years with over \$22 million in funding for the project committed by the State (Daily Liberal, 2010c).
- **Upgrade of the Western Institute of TAFE – Dubbo Campus,** which is expected to include the completion of the Central West Trade College and the Yarradamarra Centre (Daily Liberal, 2010d).

7.5.2 Major Projects in the Orana Region and Neighbouring LGA's

Mines, Resources & Energy

- **Moolarben Mine (Existing Mine Upgrade & Expansion):** A number of modifications are proposed for the existing Moolarben Mine, located to the east of the village of Ulan, including:
 - Extending the operational life of the approved Stage 1 infrastructure at the mine until 2033;
 - Receiving, handling, storing and loading coal from Stage 2 of the project;
 - Processing up to 17 million tonnes of run-of-mine coal a year and transporting up to 13 million tonnes of product coal a year from Stages 1 and 2 of the project; and
 - Relocating the Underground No.4 mine two drift entries, run-of-mine coal stockpile and pit top facilities and rehabilitating the site.
- **New Moolarben Mine:** A new open cut coal mine and two new underground coal mines on land to the west of, and adjacent to, the existing Moolarben coal mine (east of the village of Ulan) is proposed for the region. The site is approximately 40 km northeast of Mudgee in the Mid-Western Region Local Government Area.
- **Charbon Mine Open Cut and Underground Expansion Project:** The Charbon Coal Project, includes the continuance of mining operations at the existing Charbon underground mine and Southern Open Cut and extending mining operations by open-cut and underground method. Expansion of Charbon Mining operations will result in the processing of up to 1.5 million tonnes of run-of-mine (ROM) coal a year at the existing coal handling and preparation plant and transporting product coal by road and rail to local and regional markets.
- **Ulan Mine - Ulan Coal Mine Continued Operations Project:** This project involves the consolidation of existing and approved mining operations at the Ulan mine into a single, modern planning approval. Existing infrastructure at the mine will be updated and augmented. The mine will produce up to 20 million tonnes of product coal a year for up to 21 years and will be transported to domestic and export markets via rail.
- **Wilpinjong Coal Mine – Mudgee:** The proposal includes increasing the annual ROM coal mining rate from 13 to 15 million tonnes, with associated modifications to the mine infrastructure and mobile plant.
- **Tomingley Mine – Tomingley.** The proposed Tomingley Gold mine is located in Narromine LGA, 53 km south-west of Dubbo and 14 km north of Peak Hill. The proposed extraction of ore from three open-cut pits is expected to yield an average extraction rate of 17.9 million tonnes per year for 6 years. The proposal includes development of three waste rock emplacement areas, haul roads, water pipeline, transmission line and other associated infrastructure including storage dams, offices and car park.
- **Northparkes Mine:** North Mining Limited proposes to extend its underground gold/copper mine at the Northparkes mining complex. The project includes the establishment of a new underground mine to extract up to 34 million tonnes of ore over 10 years and construction of associated infrastructure at the site, such as an above-ground conveyor and two tailings dams.
- **Endeavor Quarry – Cobar:** The Endeavour Quarry at Cobar is a sand extraction project to supply 3.6 million cubic metres of sand over ten years for use in the Endeavor zinc-lead-silver mine back-fill program. This project is approximately 50 km north of Cobar on the Darling Downs property, a Western Lands Lease.
- **Newstead (Wallumbilla Gas Hub) (Qld) to Bulla Park (NSW) gas pipeline:** This will comprise the development of a 645 km high pressure, buried gas pipeline connecting the Wallumbilla gas hub in Queensland, with the Moomba to Wilton gas pipeline at Bulla Park. About 350 km of pipeline will be located in NSW which will cross the NSW LGA's of Bourke, Brewarrina and Cobar LGA's.

- **Young to Wellington Gas Pipeline:** Construction of a 220 km high pressure natural gas pipeline to connect the Moomba to Sydney Pipeline at Young, to the Wellington gas fired power station.
- **Wellington Gas-Fired Power Station:** To enable installation of two 255 MW gas turbines, as an alternative to the approved four turbines, and allow extended operation of the power station (as an intermediate plant, with a 40% capacity factor).
- **Parkes Gas-Fired Power Station:** An 80 megawatt gas-fired power station is proposed for the Parkes LGA, which would greatly improve base load electricity supply to the local region. The project is expected to be implemented in two stages with additional infrastructure including:
 - **Stage 1:** Installation and operation of seven sets of 8.4 MW gas fired reciprocating generator sets;
 - **Stage 2:** Installation and operation of an additional two to three sets subject to future demand; and
 - **Additional infrastructure** to be constructed will include the gas pipeline to connect to existing gas supplies and electricity transmission lines to connect to the grid.
- **North West Parkes Gas Fired Power Station:** International Power (Australia) proposes to construct and operate a 120 megawatt gas-fired power station at Parkes. The power station would operate as a peaking plant, generating electricity on an as-required basis anticipated to be no more than 10% of any year. The project has an estimated value of \$130 million.

Transport, Warehousing & Industrial Processing

- **Tallawang to Wallerawang and Ulan Freight Corridor Upgrade:** The freight corridor upgrade will include the upgrading of existing track, new track works, bridges and structures, and signaling.
- **Parkes Intermodal Terminal:** Construction of an intermodal terminal on a 365 hectare site approximately five kilometres west of Parkes will provide a facility for the large scale transport and warehousing/storage of freight and the transfer of freight containers between trucks and trains. The proposed terminal would be located at the confluence of the Main Western and Parkes - Narromine railway lines. The project will be developed in two stages, with the initial stage (Years 1-5) being capable of handling up to 240,000 Twenty Foot Equivalent Units (TEUs) of freight, and the ultimate stage up to 530,000 TEUs.
- **Northparkes Mine Associated Infrastructure:** The proposed Northparkes Mine will have a number of adjoining warehousing and transport infrastructure, which will be constructed to support the project. This infrastructure will include:
 - Establishment of a 1,200 square metre covered warehouse and adjacent vehicle unloading area in the open storage area adjacent to the mine processing facilities;
 - Construct a new tailings storage facility to increase the limit of ore processing to 8.5 million tonnes per year and extend the life of the mine from 2018 to 2025; and
 - Installation of secondary and tertiary crusher, and upgrade and modify the existing processing infrastructure.

8. Regional Comparison

Comparison of Dubbo with other major regional areas of New South Wales – Bathurst, Orange, Tamworth, Wagga Wagga, Albury and Armidale – is shown in the table below. These Cities have been selected for comparison based on their EvoCity status¹. Key findings from this comparison with the Dubbo economy indicate that:

- Dubbo has experienced relatively low population growth since 2001, only above that of Orange and is likely to continue in line with population growth trends in Bathurst, Orange and Tamworth.
- Strong labour force growth in Dubbo (1.7%) has been supplemented with growth in employment opportunities which has resulted in the City holding the second lowest unemployment rate of all comparison areas, highlighting the strength of Dubbo's economy in regional NSW.
- Dubbo has lower average wage rates than in Bathurst, Orange and Albury which makes Dubbo highly attractive to potential employers and investors in Dubbo's regional economy.
- Growth in commercial investment in Dubbo (non-dwelling approvals) has been significantly higher in Dubbo over the past year with a total investment of \$82.4 million – behind Wagga Wagga and Tamworth.
- Dubbo has highly affordable housing with median sales prices and rents being well below prices in all other comparison areas (except for Armidale), highlighting Dubbo as residential destination that offers affordability and quality of life for potential investors.

Table 8.1: Regional Comparison Statistics

Description	Dubbo	Bathurst Regional	Orange	Tamworth Regional	Wagga Wagga	Albury	Armidale
Population							
Population 2009	41,211	39,339	38,685	58,515	62,904	50,522	25,696
% Av. Ann. Growth 2001-09	0.8%	1.2%	0.6%	1.0%	1.3%	1.3%	0.4%
Employment							
Labour Force (No.) (Mar Q 10)	21,281	20,383	19,421	29,636	32,608	25,696	12,681
Ann. Growth (%)	1.7%	1.7%	1.7%	1.6%	1.1%	1.0%	1.8%
Employed Persons (Mar Q 10)	20,311	19,342	18,505	27,790	31,247	24,096	11,951
Ann. Growth (%)	1.0%	0.8%	1.2%	0.3%	1.3%	0.7%	1.1%
Unemployment Rate (%) (Mar Q 10)	4.6%	5.1%	4.7%	6.2%	4.2%	6.2%	5.8%
Change (%)	0.7%	0.8%	0.5%	1.2%	-0.2%	0.4%	0.6%
Average Wage (2006)	\$753	\$773	\$807	\$720	\$746	\$764	\$745
Business Activity							
Gross Regional Product (2008-09) (\$'m)	\$2,076.7	\$1,886.8	\$2,187.2	\$2,576	\$3,383	\$3,077	\$1,118
Ann. Growth (%)	4.8%	2.1%	-4.7%	3.1%	2.0%	n.a.	2.0%
Gross Industry Value Add (2008-09) (\$'m)	\$1,686.3	\$1,541.5	\$1,817.4	\$2,085	\$2,798	\$2,513	\$892
Av. Turnover (\$)/employee	\$101,934	\$102,827	\$113,174	\$97,142	\$100,084	\$102,161	\$90,041
No. Businesses (2007)	3,516	3,240	3,294	5,346	4,833	4,338	2,256
Building & Construction							
No. Dwelling Approvals	268	201	434	537	420	350	208
Annual Growth (%)	25.8%	27.2%	100.0%	81.4%	22.8%	-5.4%	150.6%
Value of dwelling Approvals (\$'M)	\$69.1	\$54.5	\$106.1	\$123.9	\$117.4	\$94.3	\$53.5
Annual Growth (%)	38.2%	45.8%	95.4%	71.8%	24.0%	65.6%	110.5%
Value of non-dwelling approvals (\$'M)	\$82.4	\$38.9	\$47.1	\$90.7	\$188.4	\$81.3	\$40.6

¹ The EvoCities program was established to raise awareness of regional Cities in NSW. These Cities are defined as defined as clean and green, vibrant, dynamic, innovative, professional, accessible and globally linked. Please view the Dubbo City Council Website for more information on Dubbo's participation as a regional EvoCity in NSW.

Description	Dubbo	Bathurst Regional	Orange	Tamworth Regional	Wagga Wagga	Albury	Armidale
Annual Growth (%)	256.0%	142.6%	0.2%	103.1%	102.9%	44.1%	318.2%
Median Property Prices							
Median Sales Price - House (\$)	\$242,000	\$270,000	\$285,000	\$275,000	\$287,000	\$335,000	\$280,000
% 1 Year Growth	2.8%	14.9%	3.4%	19.6%	-0.2%	-3.6%	8.8%
% 5 Year Growth	3.3%	2.0%	2.4%	3.4%	3.6%	1.2%	7.8%
Median Sales Price – Townhouse/Unit (\$)	\$175,000	\$183,000	\$220,000	\$160,000	\$230,000	\$208,000	\$208,000
% 1 Year Growth	-20.5%	-14.5%	11.7%	7.4%	5.7%	1.7%	15.6%
% 5 Year Growth	5.8%	-1.1%	3.2%	2.0%	6.0%	2.2%	9.9%

Source: ABS (2007a), ABS (2007b), ABS (2010a), ABS (2010b), Australian Property Investor (2010), DEEWR (2010), NSW Department of Housing (2010), NSW Planning (2010), AECgroup

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