Wheatbelt South Sub-Regional Economic Strategy

Prepared by RPS in collaboration with the Wheatbelt Development Commission

Funded by Royalties for Regions, State Government of Western Australia

GOVERNMENT OF WESTERN AUSTRALIA

Wheatbelt Development Commission

ROYALTIES FOR REGIONS

Valuable support and input to the project was provided by the Wheatbelt South local governments including:

- Shire of Brookton
- Shire of Corrigin
- Shire of Cuballing
- Shire of Dumbleyung
- Shire of Kondinin
- Shire of Kulin
- Shire of Lake Grace
- Shire of Narrogin
- Town of Narrogin
- Shire of Pingelly
- Shire of Wagin
- Shire of Wandering
- Shire of West Arthur
- Shire of Wickepin
- Shire of Williams

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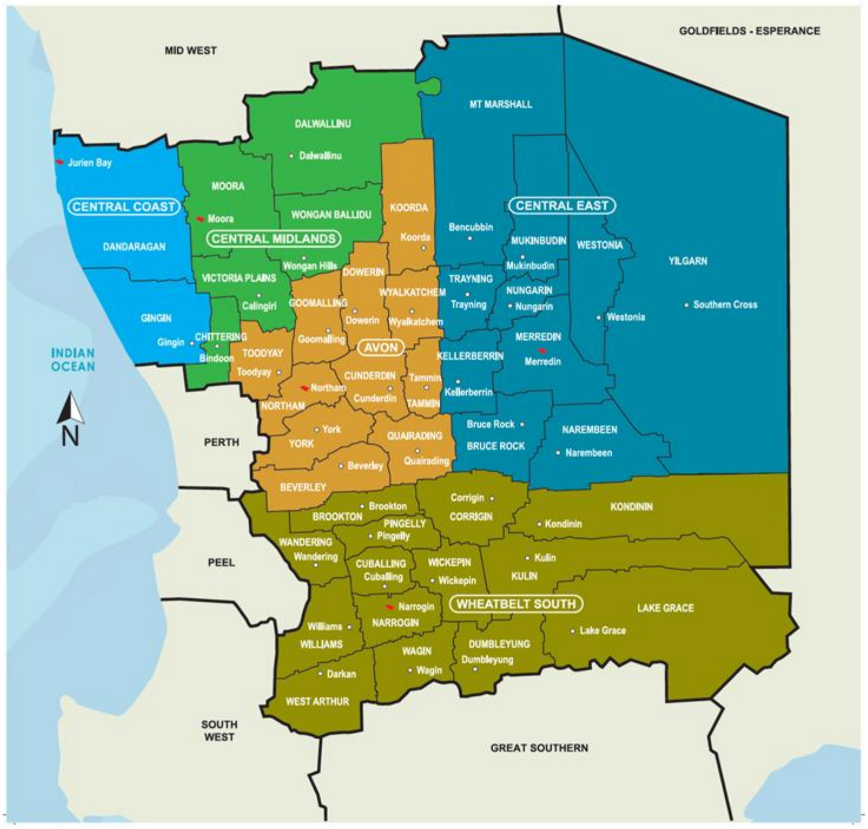
Disclaimer

Summary

The Wheatbelt South sub-region is the Wheatbelt's premier rural economy. Home to 18,242 people in 2011, the Wheatbelt South economy is driven by broadacre agriculture and livestock. It has a critical mass of residential population that supports higher order education, health, aged care and social services, particularly in major centres. Tourism, food-related supply chain services and lifestyle and retirement sectors are also prominent contributors to the economy, with emerging opportunities in mining, both in and around the sub-region. The key findings of this Strategy, developed collaboratively by RPS and the Wheatbelt Development Commission and in consultation with the Wheatbelt South Shires, are illustrated below.

The diversity of geographical, economic and industry drivers of the Wheatbelt South, including its peri-urban and rural lifestyle and agricultural foundations, present considerable opportunities for major growth in local economic activity and prosperity.



This Sub-Regional Economic Strategy for Wheatbelt South provides economic analysis and evidence based guidance to assist in investment and decision making and can therefore make a major contribution to sub-regional and whole-of-region planning. This Strategy also establishes a framework for the promotion and facilitation of economic and population growth across all towns in the sub-region.

WHEATBELT SOUTH SUB-REGIONAL ECONOMIC STRATEGY

AGRICULTURAL HEART OF THE WHEATBELT

GLOBALISING THE WHEATBELT SOUTH

Wheatbelt South is the agricultural heart of the region. Home to extensive wheat and livestock production, the sub-regional economy is an export-oriented economy with emerging strengths in mining and tourism.

These economic strengths have the potential to underpin positive population growth, supporting growth of the labour force and new sectors of the economy.

- AGRICULTURE
- TOURISM
- RURAL LIVING

ECONOMIC PROFILE

POPULATION GROWTH

Wheatbelt South has the economic capacity to support 22,500 residents in 2036, grow th of almost 7,000 new residents in 25 years.

2011: 18,242 → 2036: 22,500

AGRICULTURAL PRODUCTION

The Wheatbelt South is a major broadacre grain producing region in the State, w ith Lake Grace accounting for approximately a quarter of local grain production. The sub-region is also home to almost 30% of the State's sheep flock and is a major cattle prducer

MINING INVESTMENT

Mining investment in the Wheatbelt South has resutled in mining overtaking agriculture as the largest contributor to Gross Regional Product. Nickel mining in Kondinin is expected to continue to drive activity.

HEALTH & AGEING

The Wheatbelt South has one of the oldest popualtion profiles in the region, w ith almost one in four residents of tow ns such as Brookton and Corrigin already aged 65 and over.

This age profile is expected to drive demand for a diverse range of health services, including hospital, GP, allied health and aged care. How ever, it w ill also impact the availability of w orking age people for local businesses, driving the need for population grow th.

SMALL BUSINESS GENERATION

The Wheatbelt South sub-region has the most dynamic small business sector in the region. The sub-region accounts for almost 30% of all small businesses in the Wheatbelt and has a higher level of small businesses per 1,000 residents than leading regions such as the South West and Great Southern.

Small business activity is clustered in Narrogin but is distributed across the region. Agriculture and construction figure strongly w hile population grow th and ageing is expected to drive population serving sectors like health and retail in the future.

KEY ECONOMIC OPPORTUNITIES FOR THE WHEATBELT SOUTH ECONOMY

AGRICULTURE, LIVESTOCK & FOOD SUPPLY CHAINS

Comparative climate resilience, established local supply chains and improved access to export infrastructure w ill allow the sub-region to compete favourably to meet the grow ing demand for food in Asia and around the w orld.

HEALTH AND EDUCATION

Population grow th and ageing is expected to drive need for health and education services. Health demand w ill range from primary health care to aged care services, w hile education services need to be closely linked to local industry.

LIFESTYLE AMENITY AND RETIREMENT

The peri-urban and rural environment of the sub-region has the potential to attract and support a grow ing population. This includes catering for existing and new older residents, as w ell as attracting new families and w orkers.

TOURISM

Tourism in the sub-region is an established opportunity, w ith Wave Rock near Hyden an internationally recognised tourist destination. Opportunities exist to leverage the sub-region's proximity to Perth to capture "grey nomad", adventure and eco-tourism markets.

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1.0 Introduction

1.1 Background

The Wheatbelt South sub-region is renowned for its agricultural foundations and a myriad of communities and townships. Extending semi-rural locations to the south-east of Greater Perth to the South West, Great Southern and Goldfields-Esperance regions of the State, the sub-region plays an important role in helping to diversify and decentralise Western Australia's projected population growth.

The Wheatbelt Development Commission sees merit in researching regional centres and their sub-regions in context to each other, highlighting how the Wheatbelt South functions as a distinct economic unit and also part of a much larger profile. Detailed investigation at the sub-regional level is fundamental given the spatially-dispersed population and industry profile of the Wheatbelt region.

This Strategy will provide regional context and strategic planning to support economic and population growth in this sub-region.

1.2 Project Purpose

RPS was engaged by the Wheatbelt Development Commission to prepare a Sub-Regional Economic Strategy for the Wheatbelt South. This Strategy is to provide economic analysis and evidence based guidance to assist in investment and decision making, and will therefore make a major contribution to sub-regional and whole-of-region planning. This Strategy also establishes a framework for the promotion and facilitation of economic and population growth across all towns in the sub-region.

1.3 Wheatbelt South Sub-Region

For the purpose of this Strategy, the Wheatbelt South Sub-Region includes the following Local Government Areas:

- Brookton;
- Corrigin;
- Cuballing;
- Dumbleyung;
- Kondinin;
- Kulin;
- Lake Grace;
- Narrogin (S);
- Narrogin (T);
- Pingelly;
- Wagin;
- Wandering;
- West Arthur;
- Wickepin; and
- Williams.

This is illustrated in the following figure.

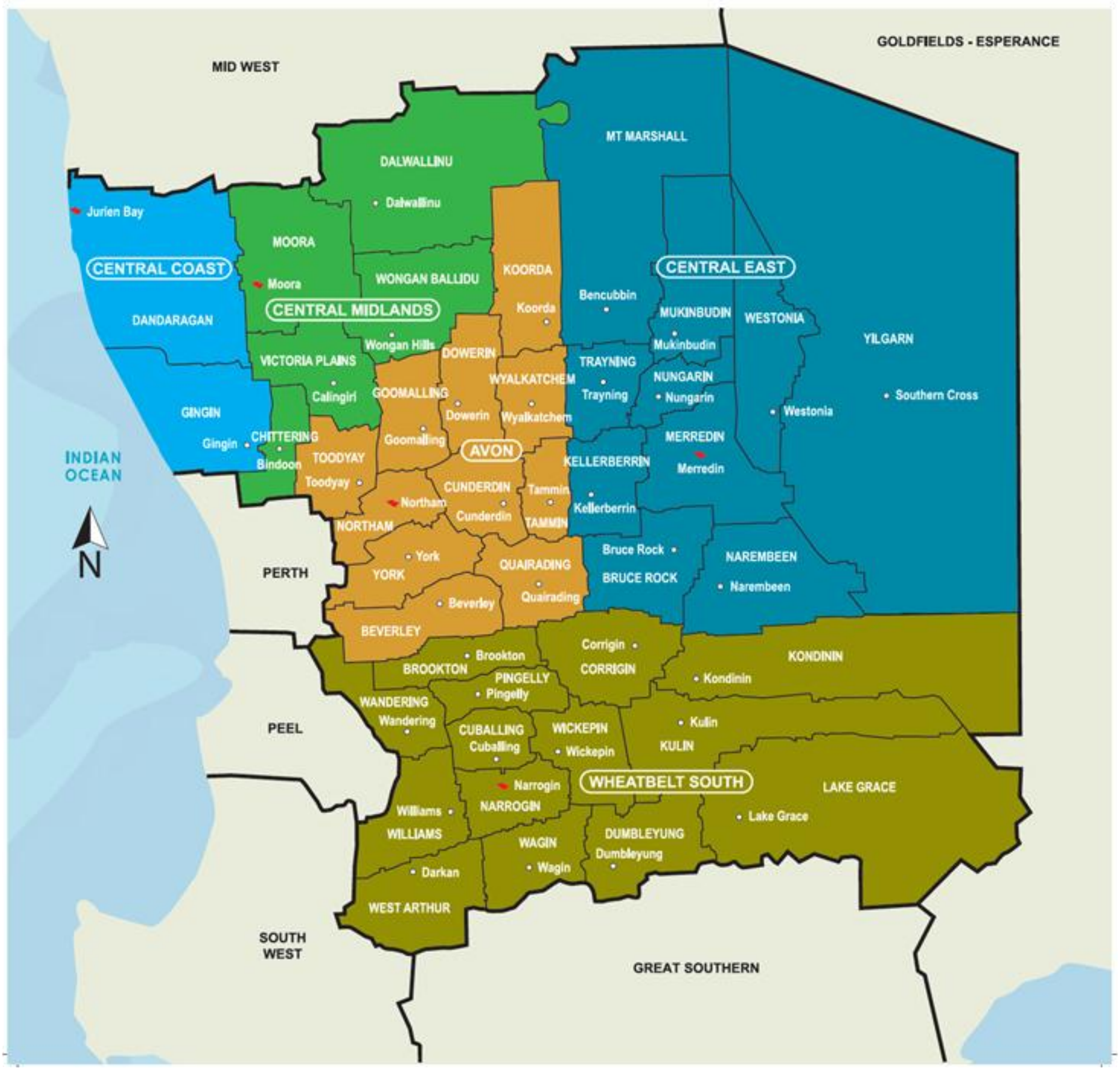

Figure 1 : Sub-Regions and LGAs, Wheatbelt[1]

1.4 Strategy Structure

This Strategy comprises of the following key sections:

- ***Globalising the Wheatbelt South*** – an overview of key global and national macro-economic drivers relevant to the Wheatbelt South sub-region;
- ***Profile of the Wheatbelt South Economy*** – detailed profile of the Wheatbelt South sub-regional

[1]WDC (2012), Provided by Wheatbelt Development Commission.

economy including population and socio-demographics, labour force and skills, employment and industry, housing and affordability and community services and facilities. Analysis covers each LGA and the broader sub-region;

- ***Key Economic Opportunities*** – identification and summary of key economic opportunities for the sub-regional strategy including rationale, drivers and trends and sub-regional characteristics; and
- ***Opportunity Network Analysis*** – identification and analysis of the distribution of economic competitive advantages and opportunities across towns and LGAs in the Wheatbelt South.

In addition, concise Local Government profiles, distilling the results of the Strategy for each local area have been developed and included in the Appendix.

The Strategy's structure is illustrated in the following diagram.

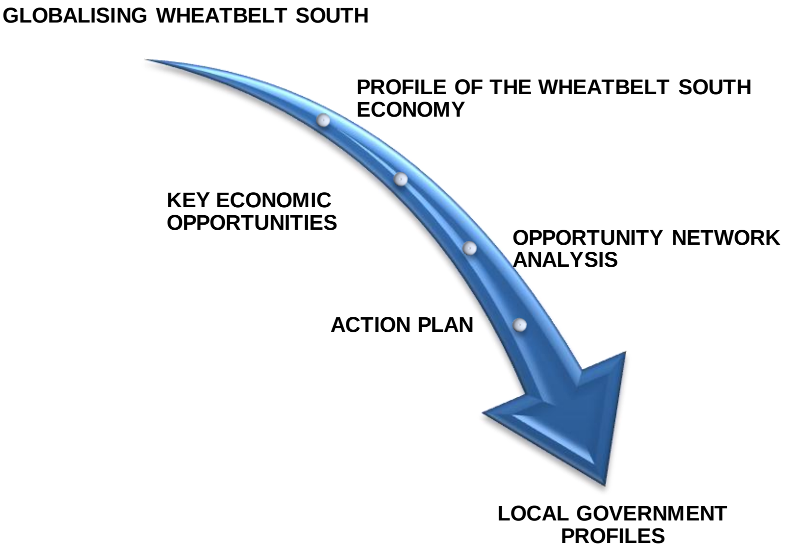

Figure 2 : Economic Strategy Structure

This structure ensures the flexibility of the Strategy, recognising the various roles and audiences of the document. These include:

- Providing an overall strategy for the economic development of the sub-region;
- Informing sub-regional and regional land use and strategic planning activities;
- Providing an evidence base for investment prospectuses and funding business cases;
- Providing content for marketing and branding material for the sub-region; and
- Informing and guiding all levels of Government in major investment and expenditure decisions.

To meet the requirements of these various audiences, this Strategy has been structured to allow key sections and analysis to be read and utilised independently of the broader document.

1.5 Approach

This Sub-Regional Economic Strategy has been developed by RPS in partnership with the Wheatbelt Development Commission. This project has applied the principles of "collaborative consulting" where the project client is actively involved in the development of the report including data collection, strategic overview and stakeholder consultation tasks.

This approach is highly advantageous for a number of reasons:

- Draws upon the Commission's existing resources to support data collection and consultation tasks;
- Allows the Commission's unique understanding of the region to be incorporated into the Strategy;
- Ensures value for money for the client by allowing RPS to concentrate on more detailed modelling and strategic analysis tasks; and
- Enables strategic and objective analysis to be undertaken by RPS, ensuring the Strategy's evidence base is rigorous and suitable to inform investment decision and funding business cases.

1.6 Glossary and Abbreviations

Term/Abbreviation	Definition
ABS	Australian Bureau of Statistics
ABARES	Australian Bureau of Agricultural and Resource Economics and Services
BREE	Bureau of Resource and Energy Economics
BOM	Bureau of Meteorology
CRC	Community Resource Centre
GFC	Global Financial Crisis
GRP	Gross Regional Product
IVA	Industry Value Added
LGA	Local Government Area
Median Multiple	Ratio measure of housing affordability. Represents the number of years of median household income required to equate to median house prices in an area.
RBA	Reserve Bank of Australia
SIHI	Southern Inland Health Initiative
T/Ha	Tonnes per Hectare
WACHS	Western Australian Country Health Service
WAPC	Western Australian Planning Commission
WDC	Wheatbelt Development Commission

2.0 Globalising the Wheatbelt South

The Wheatbelt South sub-region of Western Australia was home to 18,242 people in 2011[2], or some 3.5% of Western Australia's non-metropolitan population. It is an established region with an economy founded on quality agricultural production and a range of diverse economic, population and industry drivers.

2.1 Agriculture and Food Supply

Agriculture and food production are central industries in the Wheatbelt South and broader Wheatbelt region. Over the decade to 2012/13, over 730,000ha of agricultural land has been sown with broadacre grains annually, yielding an average 1.16 million tonnes[3] per year.

Global food demand has increased in recent years in response to accelerating population growth and growing incomes in developing countries[4]. This has led to a spike in food prices over the past 10 years following decades of real price declines in response to technology and land management-based productivity increases[5]. Cereal crops have been particularly volatile, as illustrated in the figure below.

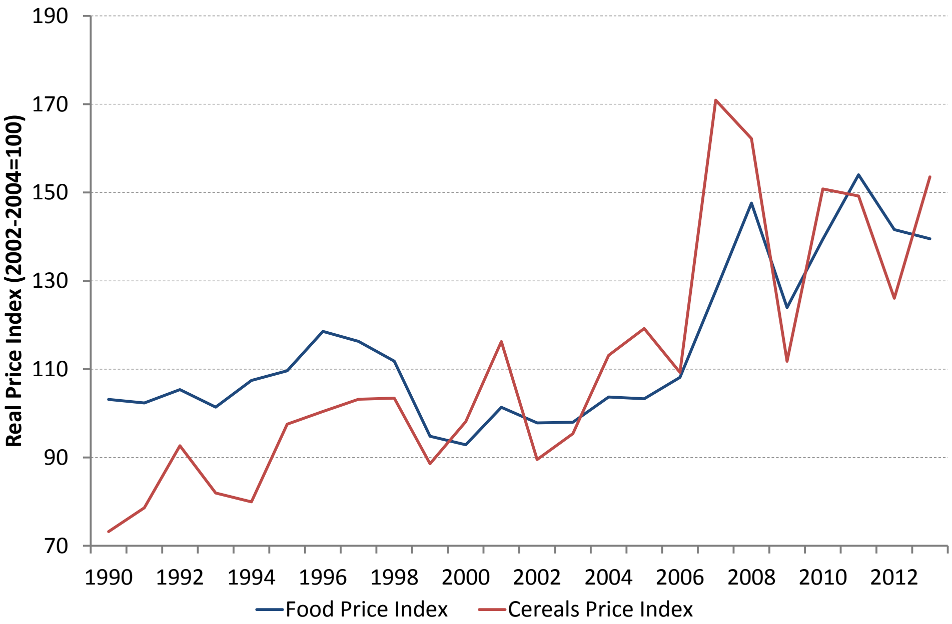

Figure 3 : Real Food and Cereal Price Index, 1990 to 2013[6]

Australia is the fifth largest exporter of wheat in the world[7] and Western Australia accounts for approximately 18% of national production[8]. Australia's competitive advantage in both broadacre crops, horticulture and

[2] ABS (2012), Estimated Residential Population, Cat No 3218.0, Australian Bureau of Statistics, Canberra
[3] CBH (2013) Unpublished Production Data, CBH, Perth
[4] ANZ (2013), Greener Pastures: The Global Soft Commodity Opportunity For Australia and New Zealand, Melbourne
[5] FOA (2012), OECD – FAO Agricultural Outlook 2012-2021, Food and Agricultural Organisation, Rome
[6] ABS (2012), Historical Selected Agricultural Commodities, Cat No 7124.0, Australian Bureau of Statistics, Canberra
[7] ABARES (2013), Agricultural Commodities Statistics, March 2013, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra
[8] ABS (2012), Historical Selected Agricultural Commodities, Cat No 7124.0, Australian Bureau of Statistics, Canberra

livestock production positions sub-regions like the Wheatbelt South well to reap the reward of structural uplifts in global agriculture commodity prices. WA's grain exports in 2012/13 represented 40% of Australia's total cereal exports and were sold into more than 30 countries throughout the world[9].

2.2 Population and Ageing

In 2011, people aged 65+ accounted for 16.0% of the Wheatbelt South population[10]. This is considerably above the average in metropolitan Perth (12.5%), Western Australia (12.3%) highlighting the older population profile of the region. This ageing is in line with trends in the Western World, reflecting the retirement of the Baby Boomer generation (1946 to 1964). The local impacts of this global trend are already starting to reveal themselves with employment in the health care and social assistance sectors recently overtaking retail as the largest employment sector in the WA economy. This is illustrated in the following figure.

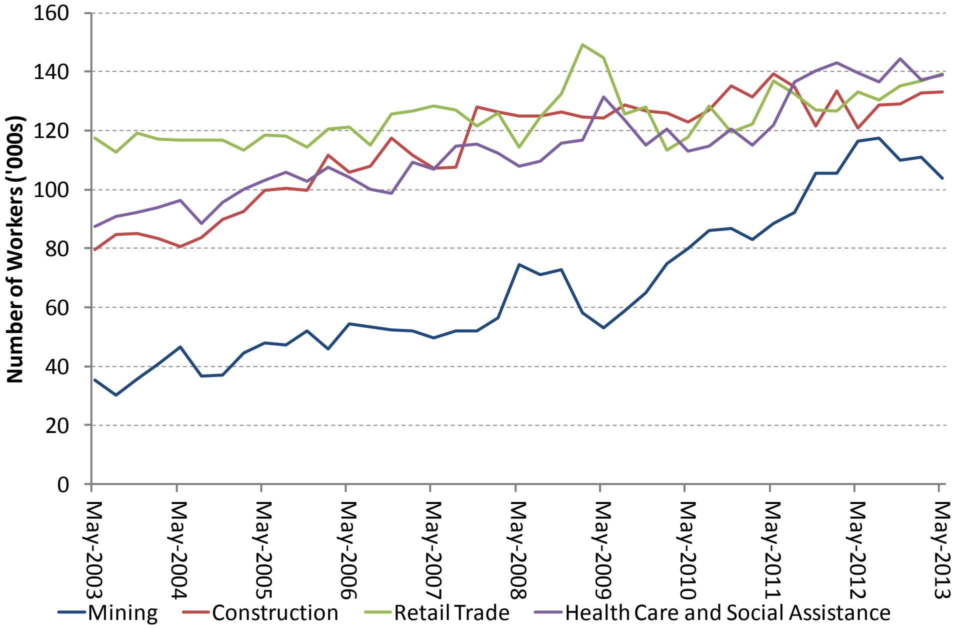

Figure 4 : Employment by Industry, Western Australia, 2003-2013[11]

With the first of the Baby Boomer generation retiring in 2012, and an existing older population profile, the Wheatbelt South sub-region is expected to experience a surge in demand for health-related services.

2.3 Rural Living

The world's population continues to increase rapidly and Western Australia is an attractive destination for new residents. Western Australia has had the highest population growth rate of all major states since 2006, averaging 2.8% per annum[12]. This growth has been from a combination of strong fertility rates and inward migration from interstate and overseas, such as UK, New Zealand, South Africa and South East Asia. Policy

[9] Department of Agriculture (2013) Snapshot of Western Australia's Grain Industry accessed at https://www.agric.wa.gov.au/barley/snapshot-western-australias-grain-exports on 2 August 2014.
[10] ABS (2012), Census of Population and Housing, Australian Bureau of Statistics, Canberra
[11] ABS (2013), Labour Force, Australia, Detailed, Quarterly, Cat No 6291.0.55.003, Australian Bureau of Statistics, Canberra
[12] ABS (2013), Estimated Residential Population, Cat No 3218.0, Australian Bureau of Statistics, Canberra

makers need to cater for this expanding population while preserving the State's unique local environments and valued quality of life.

Regional Western Australia has been experiencing population growth over the last decade to accommodate the State's increasing population. The growth of regional cities and towns over the past decade has led to the growth in amenities and services as well as opportunities for a range of lifestyles and economic investment. This process has gradually raised awareness among urban residents in metropolitan areas of the benefits of living, working and studying in regional cities and towns.

WA's rural areas contain important ecosystems that are vital to the functioning of the State. They provide some of our most basic needs such as fresh air, clean water and fertile soils to produce food, fibre, timber and minerals. Over the last decade, population in regional Western Australia has been tracking the growth of the state's population, with the annual average growth of regional Western Australia (1.8%) increasing at a slightly slower rate than the state average (2.8%). This is illustrated in the following figure.

Figure 5 : Annual Population Growth Rates of WA and Regional WA, 2002-2012[13]

This trend shows that rural and regional communities continue to be attractive places for people to live and work. The size and extent of the Wheatbelt South sub-region means that it is comprised of peri-urban (Williams, Brookton, Wandering), regional centre (Narrogin) as well as rural town and community living options, which makes the sub-region unique in the broader Wheatbelt. Promoting the sub-region's affordable housing and cost of living, relaxed rural lifestyle and access to diverse employment opportunities is key to accelerating population growth in the medium term.

[13] ABS (2012), Regional Population Growth, Australian Bureau of Statistics, Cat No 3218.0, Canberra.

2.4 Conclusions

The Wheatbelt South sub-region and its economic growth and development are inexorably linked to global trends. Increased demand for food products due to rising population and income levels in developing countries will underpin the future of agriculture in the region. The ageing of the population globally and its impacts on service demand will invariably influence the development of the Wheatbelt South sub-region, which currently has an older population profile than state and national averages. Finally, the Wheatbelt South sub-regional economy provides attractive opportunities for rural residential developments to cater for the increasing population of the state by generating quality employment options and providing a high and affordable standard of living for current and future residents alike.

3.0 Profile of the Wheatbelt South Economy

3.1 Population and Socio-Demographics

The Wheatbelt South sub-region was home to 18,242 people in 2011. This population is primarily concentrated in the major townships of Narrogin, Wagin, Lake Grace, Pingelly and Corrigin, which collectively account for almost one in every two Wheatbelt South residents.

The sub-region has experienced a very minor population decrease over the past decade, averaging -0.4% per annum compared to 2.8% increase for Western Australia as a whole. The WA Tomorrow Population Estimates from the Western Australian Planning Commission project that this trend will continue to 2021[14]. However, the accuracy of this trend is questionable as a robust economic environment, the sub-regions competitive advantage in agriculture and food supply chain and the development of several major initiatives and projects have the potential to support accelerated population growth up to 22,500 by 2031. This is illustrated in the following figure.

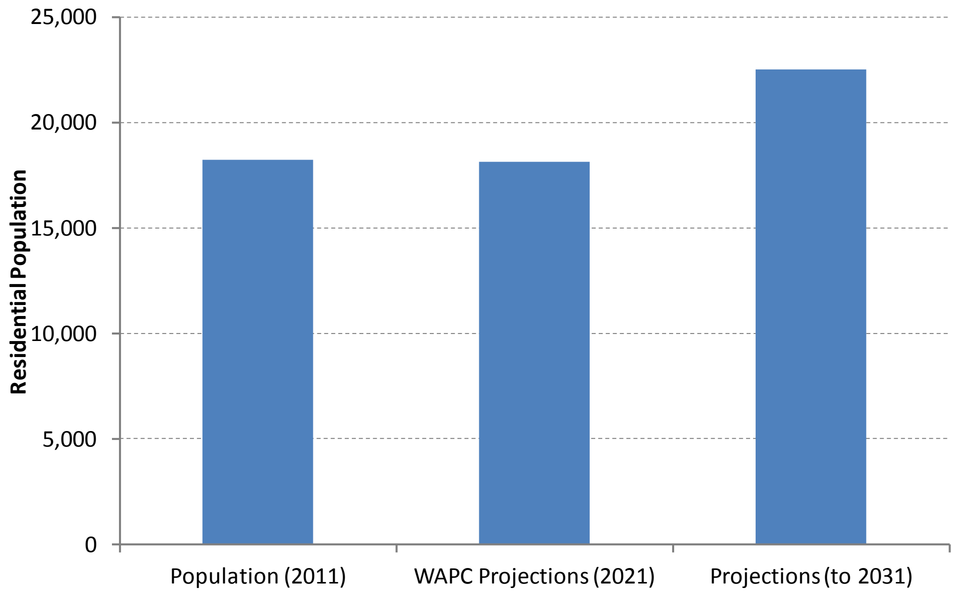

Figure 6 : Current and Future Residential Population

The population of the Wheatbelt South sub-region is also expected to age rapidly over the next decade. This reflects the fact that the sub-region and associated population centres already possess a comparatively older population profile. According to the results of the 2011 Census of Population and Housing, the residential populations of most LGAs in the Wheatbelt South sub-region (16%) have higher proportions of people aged 65+ than the State Average (12.3%). Towns such as Brookton (23.2%) and Corrigin (21.4%) have the highest share of their current populations aged 65 and over[15].

[14] WAPC (2012), WA Tomorrow Population Estimates, Western Australian Planning Commission, Perth.
[15] ABS (2012), Census of Population and Housing, 2011, Australian Bureau of Statistics, Canberra

3.2 Labour Force and Skills

A significant driver of current and future residential population growth in the Wheatbelt South will be the increasingly constrained nature of local labour markets. As at the 2011 Census, the Wheatbelt South unemployment rate was 4.1%, below the comparative state average of 4.7%[16]. This is illustrated in the following figure.

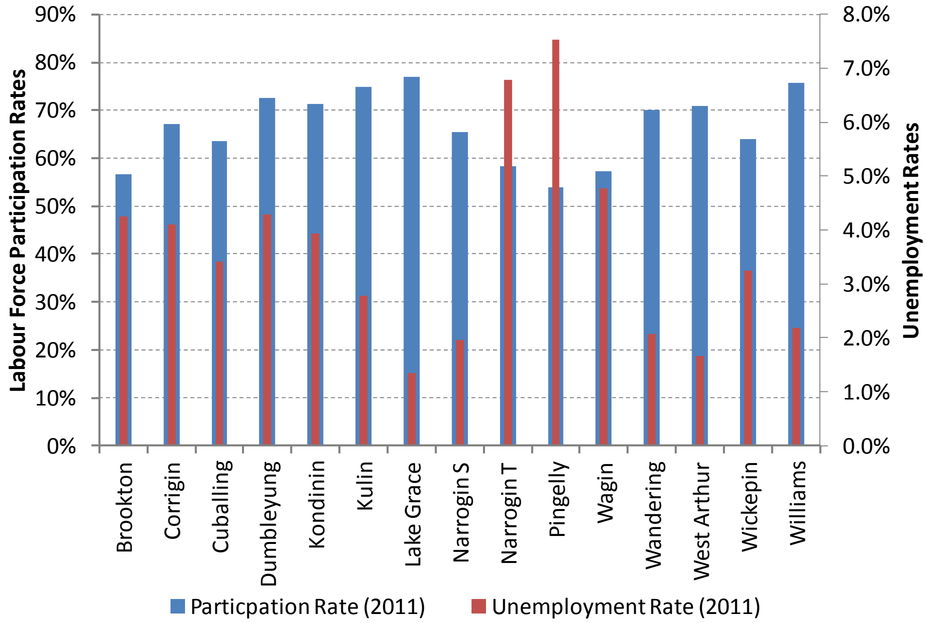

Figure 7 : Unemployment and Participation Rate, Wheatbelt South Sub-Region LGAs, 2011

The Town of Narrogin had above average unemployment in 2011, reflecting the town's role as the sub-region's major service centre, including social and welfare services. Pingelly was also very high, exceeding 7.0%. Despite this, the majority of LGAs in the Wheatbelt South sub-region had unemployment rates significantly below the State average. This confirms that the Wheatbelt South is regarded as a low unemployment sub-region in the Wheatbelt.

This low unemployment rate has supported a labour force participation rate (64.5%) that is similar to the State average (64%). Labour force participation rate is the share of the population aged 15 and over actively participating in the workforce (either employed or unemployed). With a low unemployment rate and solid participation rate, any major employment growth in the Wheatbelt South sub-region in the future will need to be accommodated by migration into the region. Migration is occurring across the sub-region including the increasing number of retirees moving into Dumbleyung and Kukerin due to housing affordability and quiet lifestyle, increased number of mining families moving to Wandering and increased number of tree changers moving into Brookton.

[16] ABS (2012), Census of Population and Housing, 2011, Australian Bureau of Statistics, Canberra

3.3 Employment, Industry and Investment

The Wheatbelt South Sub-Region had a Gross Regional Product[17] in 2012/13 of approximately $980m[18]. The major drivers of this economic activity are agriculture, mining, construction, transport and community services (e.g. Health, education and public administration). This is illustrated in the figure below.

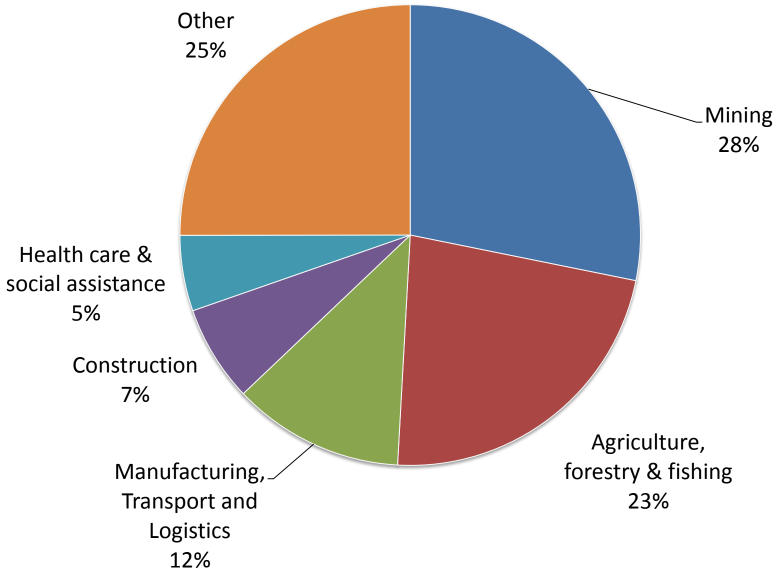

Figure 8 : Share of Industry Value Add, Wheatbelt South Sub-Region, 2010/11 to 2012/13[19]

This economic activity has underpinned local employment and business activity. In 2011, there were 7,784 jobs in the Wheatbelt South sub-region, representing an employment self-sufficiency rate (ESS - ratio of local jobs to local workers) of 90.1%[20]. This is a very high self-sufficiency rate, indicating that the Wheatbelt South economy is relatively self-sufficient and self-contained. Employment in the Wheatbelt South is geographically distributed throughout the sub-region, with the exception of the Town of Narrogin, which accounts for over one in four jobs in 2011 (25.4%). This concentration of employment mirrors the distribution of population in the sub-region.

The predominance of mining in the sub-regional economy reflects nickel mining activity in the Shire of Kondinin. However, the flow on effects of mining to local economies is often not as significant or diverse as in other industries. This is particularly the case for mines that operate their workforces on a FIFO/DIDO basis, meaning the employment benefits are not captured by the local or even regional economy.

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[17] Gross Regional Product is the value of the economic activity produced in the region, discounting for inputs produced in other regions. It aligns with measures such as Gross State Product and Gross Domestic Product for States and Territories.
[18] RPS (2014), RPS Economics Gross Regional Product Model, RPS, Gold Coast
[19] Industry Value Added, rather than Total Output, is utilised as a measure of local economic activity as it removes the value of inputs to production and therefore prevents double counting.
[20] ABS (2007), Census of Population and Housing 2006, Australian Bureau of Statistics, Canberra

The number of business registrations has remained stable between 2009 and 2012. Despite being in a period of global economic downturn, most businesses in the Wheatbelt South remained resilient and continued to operate as usual. This is illustrated in the following figure.

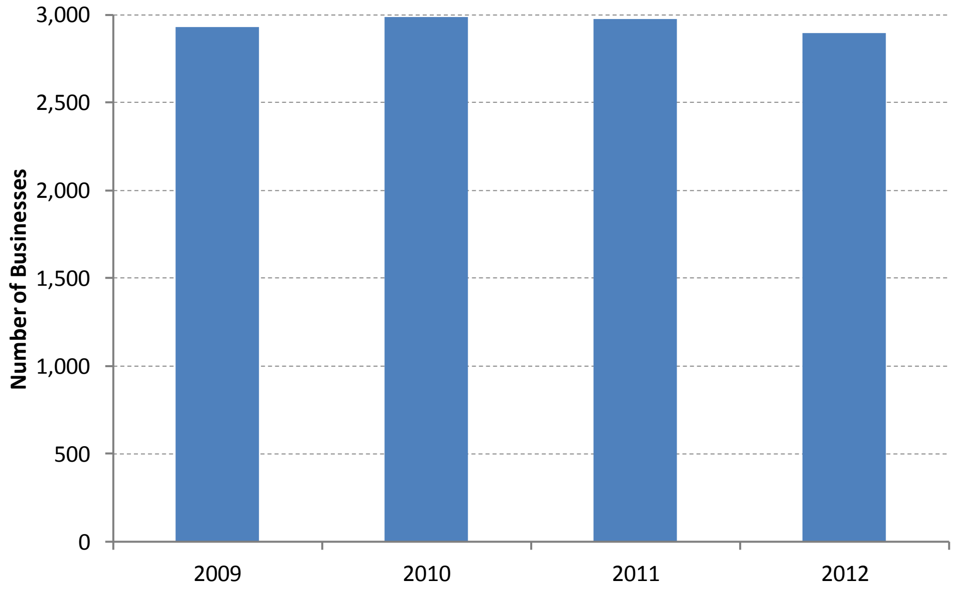

Figure 9 : Share of Locally Registered Businesses, Wheatbelt South Sub-Region LGAs, 2009-12

A review of small business numbers in the Wheatbelt South reveals a strong small business community. In 2012, there were 2,890 small businesses registered in the sub-region, at a rate of 157.3 businesses per 1,000 residents. This rate compares favourably with the Wheatbelt average and Great Southern levels (133.7 and 149.5 respectively) – regions which have by far the highest rate of small business creation in regional WA. Narrogin (T) had the largest number of small businesses in 2012 with 440, but had the smallest rate of small businesses per 1,000 residents (at 98.9). This reflects Narrogin's role as the major population centre of the Wheatbelt South sub-region. In contrast, Dumbleyung and Kondinin had the highest rates of small business ownership (227.3 and 227.1 respectively) in 2012. This is outlined in the table below.

Table 1 Small Business Population and Rate, Wheatbelt South LGA[21]

LGA	Small Business Population	Small Businesses per 1,000 Residents
Brookton	150	153.4
Corrigin	170	156.4
Cuballing	140	157.1
Dumbleyung	140	227.3
Kondinin	240	227.1
Kulin	190	224.6

[21] ABS (2012), Census of Population and Housing, 2011, Australian Bureau of Statistics, Canberra and AIHW (2012), Hospital Statistics 2010/11, Australian Institute of Health and Welfare, Canberra

LGA	Small Business Population	Small Businesses per 1,000 Residents
Lake Grace	310	222.7
Narrogin (S)	110	121.4
Narrogin (T)	440	98.9
Pingelly	190	160.3
Wagin	290	151.6
Wandering	70	156.6
West Arthur	140	155.6
Wickepin	170	223.7
Williams	140	148.5
Wheatbelt South	**2,890**	**157.3**

3.4 Housing and Affordability

The Wheatbelt South sub-region housing market is comprised of almost 8,900 dwellings, of which approximately 76% are occupied[22]. This indicates that there is currently capacity in the existing housing market to absorb increased residential population in the short-term. The current housing stock is predominantly detached housing, which accounted for 98.5% in 2011. Given the size of the population and the changing demographic profile of the sub-region, greater levels of housing diversity will likely be required in the short-to-medium term.

Over the past five years, the Wheatbelt South sub-region and the broader Western Australian housing market have experienced volatile conditions, with prices rising and falling during the period. This reflects the impact that the GFC and subsequent depressed level of consumer confidence has had on housing market activities and therefore prices. Despite this, the Wheatbelt South market experienced price growth over the period, with median house prices increasing from $140,000 in 2006 to $175,000 in 2012[23]. This represents growth of 23% over the period, ahead of the State average growth of 18%. This is illustrated in the following figure.

[22] ABS (2012), Census of Population and Housing 2011, Australian Bureau of Statistics, Canberra
[23] RPData (2013), Online Data Subscription, RPData, Brisbane

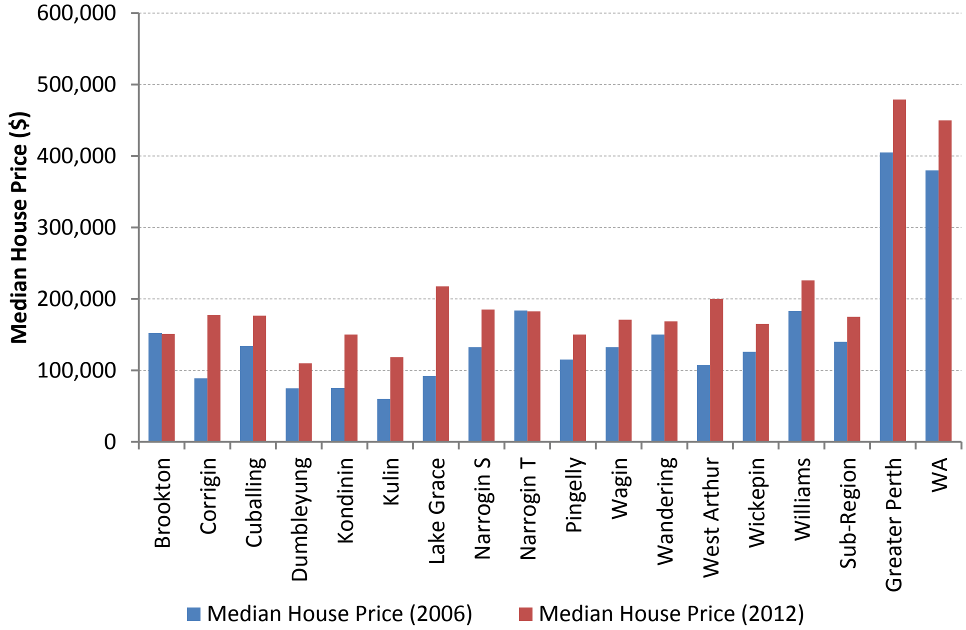

Figure 10 : Median House Prices, Wheatbelt South Sub-Region, 2006 and 2012

Excluding Narrogin (T) and Brookton, which had stable prices, all LGAs over this period experienced positive price growth. However, the level of growth varies dramatically. Prices more than doubled in Corrigin, Kondinin, Lake Grace and West Arthur, with more moderate growth in Shires such as Pingelly, Wandering and Wagin.

Price growth is generally regarded as positive as it contributes to the wealth and affluence of a region. However, for the Wheatbelt South sub-region, maintaining affordable housing options is critical for the employment and lifestyle based migration required to increase local population.

A simple and effective measure of whole-of-market affordability is the Median Multiple – the ratio of median house prices to median household income[24]. In other words, the Median Multiple illustrates the number of years of household income required to equal current prices. This approach is effective in that it allows for differences in local income levels within a region (like the Wheatbelt South) to be considered, ensuring that variations in purchasing power and relative affordability are determined.

[24] Demographia (2012), International Affordable Housing Report 2012, Demgoraphia, USA. Data for Wheatbelt South includes house sales only. Does not include the sale of farm and agricultural properties that also include a dwelling.

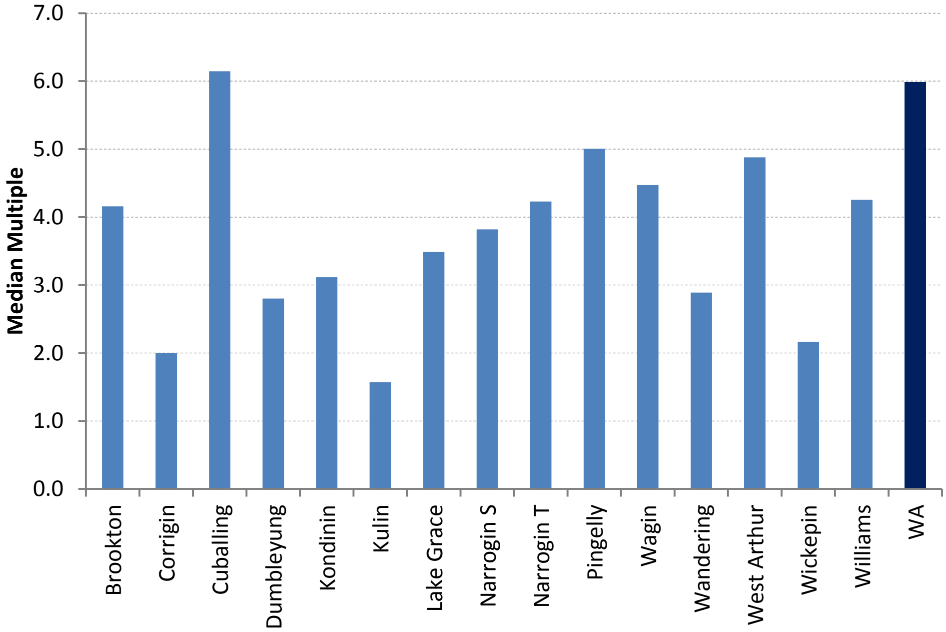

Figure 11 : Median Multiples, Wheatbelt South Sub-Region, 2011

RPS calculated the Median Multiple for each LGA in the Wheatbelt South sub-region and found that, all towns, except for Cuballing have Median Multiples less than the WA average of 6.0. Pingelly and West Arthur, have ratios approach 5.0 which is very unaffordable by international standards, while towns such as Kulin and Wickepin had very low ratios.

The variation in the ratios reflects the fact each town and LGA in the Wheatbelt South sub-region has different house price drivers and different household incomes. For example, the Shire of Narrogin, which recorded one of the higher median house prices in 2011, also had one of the highest household incomes, resulting in a moderate ratio. In contrast, the small size of markets in Kulin, Cuballing, Wandering and Wickepin mean house prices can be very volatile due to a small number of sales. This can affect the ratio from year to year.

Note that the current state average is regarded as seriously unaffordable by international standards, with the Reserve Bank of Australia considering a ratio of 4.0 to 4.5 affordable in Australia.

3.5 Community Services and Facilities

The growth in the residential population in the Wheatbelt South has and will continue to underpin demand for community services and facilities in the sub-region. These include, but are not limited to:

- Child Care Services (Education and Care);
- Primary, Secondary and Tertiary Education;
- Community Resource Centres (CRC) and Libraries;
- Aged Care and Retirement Villages; and
- Hospitals and Health Services.

The current offering and drivers of these community services and facilities are examined below.

3.5.1 Child Care

The provision of childcare and flexibility in delivery to suit rural areas is a critical component of service delivery for the Wheatbelt South. It is essential to allow greater parent participation in the workforce as well as offer early learning opportunities for children, boosting human capital. A more engaged workforce leads to an overall boost in economic output; reduces long term unemployment and dependence on welfare as well as promotes social engagement and self-esteem.

Fertility rate data is an effective leading indicator of the level of demand for child care services. In 2010, all towns in the Wheatbelt South sub-region had fertility rates above replacement levels (2.1 children) and were mostly above the average for Greater Perth (1.8[25]). Interestingly, the fertility rates of the various towns varied quite significantly, with West Arthur (4.2) among the highest and Narrogin (S) (2.2) among the lowest for the sub-region. This is illustrated in the following figure.

This high fertility rate, coupled with low unemployment and strong labour force participation, will generate demand for child care services. There are currently 21 Child Care centres in the Wheatbelt South sub-region.

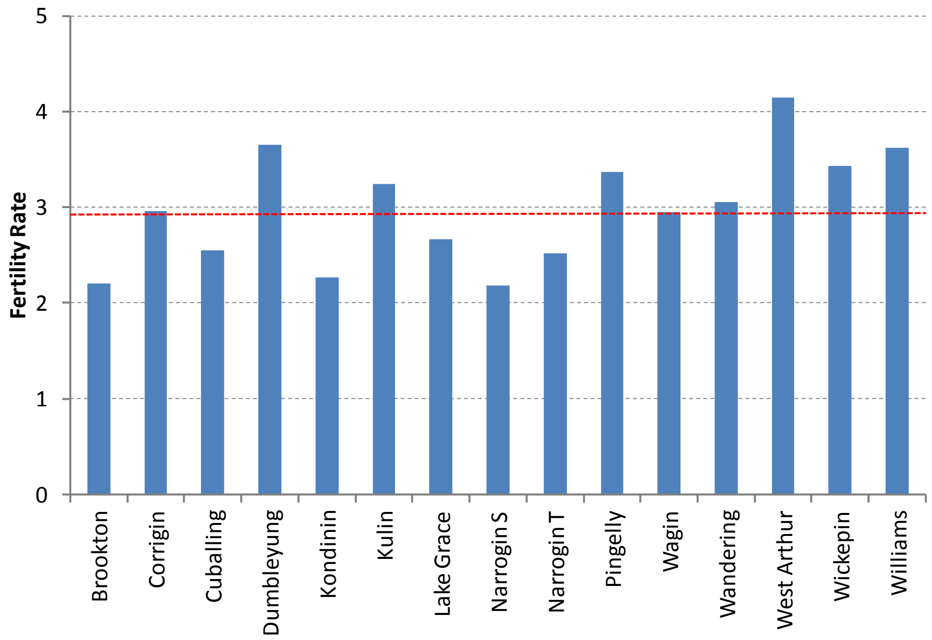

Figure 12 : Fertility Rate, Wheatbelt South Sub-Region and Greater Perth, 2011

3.5.2 Primary, Secondary and Tertiary Education

Despite the ageing of the population in the Wheatbelt South, many towns in the sub-region also have above average shares of residents aged 0-14. This reflects the long-term impact on the Wheatbelt South demographic profile of structurally high fertility rates and young families.

A review of the results of the recent Census reveals that 80% of towns in the sub-region have 0-14 shares above the average for Greater Perth (19.4%). This further underpins demand for child care services in the

[25] ABS (2011), Births Australia, Cat No 3301.0, Australian Bureau of Statistics, Canberra

sub-region, with the need for increased capacity and flexible delivery models to allow women to fully participate in the labour force and economy.

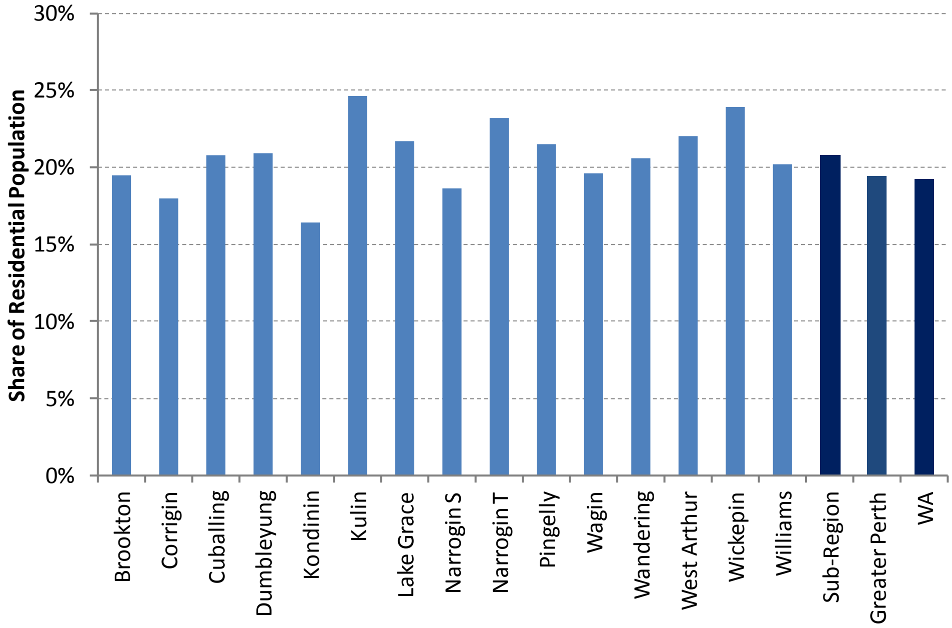

Figure 13 : Share of Residential Population Aged 0-14, Wheatbelt South Sub-Region, 2011

There is currently 15 public and 1 private primary schools' in the Wheatbelt South sub-region. Primary school distribution is evenly dispersed, with most towns having a primary school. There is also considerable variation in school sizes (8 students at Tincurrin Primary School to 339 students at Narrogin Primary School[26]).

Secondary schooling is more concentrated with district high schools located in 5 of the 15 LGAs, a senior high school in the Town of Narrogin as well as the Western Australian College of Agriculture Narrogin located in the Shire of Narrogin. A residential college is located in Narrogin which provides a boarding option for isolated secondary students attending Narrogin Senior High School and CY O'Connor Narrogin. The Western Australian School of Agriculture Narrogin is also a notable secondary schooling option which focuses on agriculture, equine and trades. It is important to acknowledge that a large number of students, particularly from farming families, attend high school at boarding schools out of the region. For the students of the Wheatbelt South this includes Perth and the regional centres of Albany, Bunbury and Esperance. As the non farming population grows in the Wheatbelt South, quality upper secondary and vocational options will be even more critical to the attraction and retention of working age families necessary to support local economic development. This could be achieved through improvement in the use of technology, offering greater course diversity to students or reinforcing pathways between secondary education and training. An example would be the relocation and consolidation of the C.Y O'Connor Institute Campus with the Narrogin Senior High School as part of an integrated Narrogin education precinct.

The labour force in the Wheatbelt South sub-region is characterised by an expected concentration of applied tertiary education qualifications (e.g. formal training and TAFE). This is reflected both in the local

[26] Western Australian Department of Education (2014) Schools Online accessed at http:// www.det.wa.edu.au/schoolsonline/home.do on 4 July 2014

employment mix and local tertiary education provision. The CY O'Connor Institute is the primary tertiary education and training facility in the Wheatbelt South and the Wheatbelt region with locations in Northam, Merredin, Moora, Narrogin and Muresk[27]. A wide range of practical courses is offered with a strong focus on administration, tourism, agricultural, health, retail and manufacturing related qualifications. There are also university supported facilities in the Wheatbelt South including the Rural Clinical School of WA in Narrogin and the UWA Pingelly Future Farm. There are also opportunities to strategically diversify offerings into mining-related occupations. This would support increased cross-industry mobility of the Wheatbelt South labour force, in response to macro-economic opportunities and decreased unemployment levels. This includes increased exposure of the sub-region to local and regional mining investment and production, such as the Kondinin- Forrestania Nickel Mine, Wandering- Boddington Gold and Bauxite mines and Wickepin - WA Kaolin deposit.

3.5.3 Libraries and Community Resource Centres

In 2011, in metropolitan Perth, there was one library for every 23,794 residents equating to a total supply of 77 libraries. The provision of libraries and associated facilities in the Wheatbelt South is more considerable with one library for every 912 residents[28]. There are a number of potential explanations for this apparent over-provision:

- The decentralised and distributed population of the Wheatbelt South has required a more dispersed library network than in metropolitan Perth;
- The number of libraries does not comment on the size and service capabilities of those libraries. Metropolitan libraries tend to be larger and therefore have the capacity to service larger population catchments; and
- Libraries are most often provided by local governments (Library Board of Western Australia Act 1951[29]), although not every LGA in Wheatbelt South is home to a library, such as Cuballing and Narrogin (S).

Community Resource Centres (CRCs) are heavily relied on in the Wheatbelt South for visitor servicing, public internet access, some government services such as Centrelink as well as library services. Ongoing utilisation of library and CRC facilities will enable communities to anchor improvements in local technology and communication networks and ensure continued provision of support for local community groups and associations and small businesses.

Growth in the Wheatbelt South's population and expansion of telecommunications servicing and infrastructure over the next decade will necessitate changes to public services. This will include the increased utilisation of library and CRC facilities to secure improvements in local technology and communication networks and provision of support for local community groups and associations and small businesses. The NBN will be accessed by fibre optic connections, fixed wireless towers and satellite. This will enable the Wheatbelt South to broaden opportunities, as connection to Perth and the world will become more seamless.

[27] C.Y. O'Connor Institute accessed via http:// www.cyoc.wa.edu.au on 20 September 2013
[28] SLWA (2012), List of Libraries in Western Australia, State Library WA, Perth
[29] State Law Publisher (2014) Library of Western Australia Act 1951 access at http://www.slp.wa.gov.au/pco/prod/FileStore.nsf/Documents/MRDocument:25612P/$FILE/Library%20Board%20of%20Western%20Australia%20Act%201951%20-%20[04-f0-00].pdf?OpenElement on 4 July 2014

3.5.4 Aged Care, Hospitals and Health Services

The older age profile of the Wheatbelt South will underpin continued demand for home and community care services and age-friendly housing offerings. In 2013 Verso Consulting Pty Ltd undertook an Aged Care Planning project for the Wheatbelt Development Commission to gain a greater understanding of the issues Wheatbelt communities are experiencing and to tailor a plan to address the future delivery of age support and care. Utilising a similar approach to the Sub-regional economic strategy research, desktop analysis and community consultations formed part of this research. The Wheatbelt South consultations focused on four Local Government groupings (4WDL, Dryandra, Roe ROC and SEAVROC).

Brookton (Kalkarni with 28 high care and 15 low care beds), Narrogin (Narrogin Nursing Home with 50 high care beds and Karinya Hostel with 35 low care beds) and Wagin (Waratah Lodge with 18 low care beds)[30] play a significant role accommodating the majority of residential aged care beds in the Wheatbelt South, where MPS facilities at Corrigin, Dumbleyung, Kondinin and Lake Grace accommodate a relatively small number of residential beds.

In preparation for their ageing population the 4WDL group (Shires of Dumbleyung, Lake Grace, Wagin, West Arthur, Williams and Woodanilling) undertook a project to develop an aged friendly plan for their area. Housing was identified by the Group as a major issue and have been successful in gaining funding toward the construction of 31 well-aged accommodation units (combination of 2x1 and 1x1 units) across their area.

The figure below highlights that Narrogin (T) currently plays a greater role in aged care facility distribution than its local 65+ population would indicate, while Wagin which is home to 12.7% of people aged 65+ currently has local aged care bed capacity for only 8.9%. This is illustrated in the following figure.

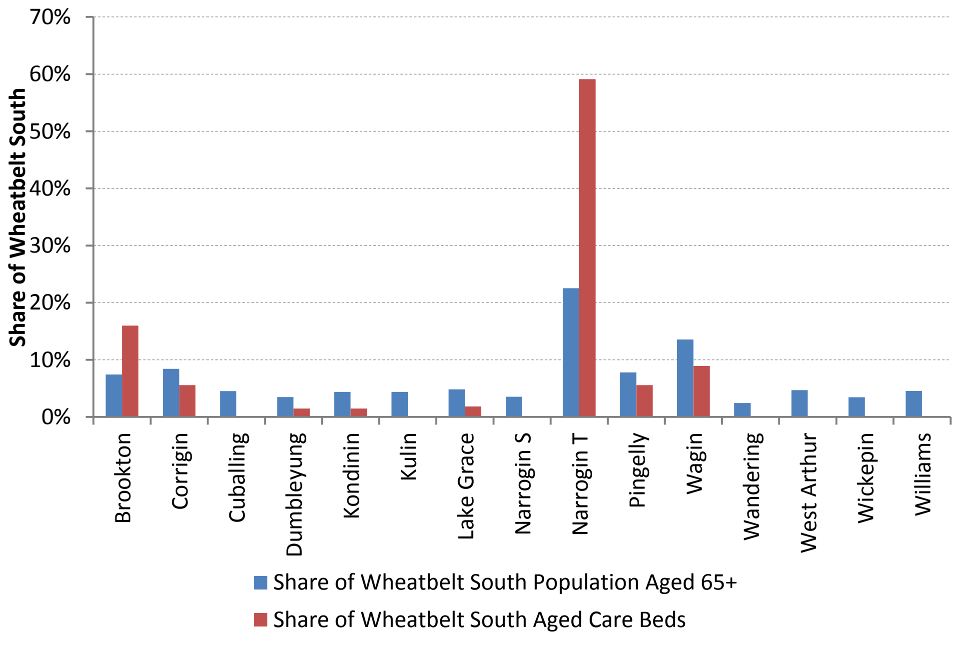

Figure 14 : 65+ Pop and Aged Care Beds, LGA Share of Wheatbelt South, 2011/12

[30] Verso Consulting, Narrogin Dryandra Needs Study (Draft Final) July 2013, Table 23 pg. 19

Figure 14 could be observed that there is a misalignment between the distribution of aged care facilities in the Wheatbelt South and the concentration of people aged 65+ in the sub-region. A possible explanation for this is the propensity for aged care capacity to be delivered close to hospital and health and ancillary service provision. In 2012, there were 100 public hospital beds in the Wheatbelt South[31], spread across Corrigin, Dumbleyung, Kondinin, Lake Grace, Narrogin (T), Pingelly and Wagin. All hospital facilities in the Wheatbelt South are small, with Narrogin (T) home to the largest facility with 44 beds.

The concentration of health and medical services in the Town of Narrogin likely explains the current concentration of aged care services in the town. Surrounding communities are moving towards primary health servicing to support older populations and the opportunity to age in place. The Pingelly Primary Health Demonstration site is a pilot for this service delivery model. Additionally, the concentration of health services, as well as high quality and diverse community and recreation facilities currently in the sub-region, has the potential to support significant growth in retirement and lifestyle-based accommodation options. Affordability, rural lifestyle and community culture of Wheatbelt towns are potentially highly attractive to older residents seeking a “tree change”. However, the lack of critical mass of population in any one LGA means attracting and supporting older residents would require the implementation of new service delivery models, focused on network and outreach-based health service delivery. This represents an opportunity for the whole of the sub-region, rather than for individual LGAs independently.

Courtesy of S Warren. Photo by Redfoto

[31] AIHW (2012), Australian Hospital Report, 2010/11, Australian Institute of Health and Welfare, Canberra

4.0 Key Economic Opportunities

RPS has identified a series of key economic themes for the Strategy, which will define the future economic growth and dynamism of the Wheatbelt South sub-region. These themes represent areas where the Wheatbelt South has a distinct competitive advantage or where socio-demographic, investment or infrastructure-based drivers underpin current and future demand.

The key themes identified for the Wheatbelt South Sub-Regional Economic Strategy include:

- Agriculture, Livestock & Food Supply Chains;
- Health & Education;
- Lifestyle, Amenity and Retirement; and
- Tourism.

These themes and associated actions and locations are explored in the sections below.

4.1 Agriculture, Livestock & Food Supply Chains

4.1.1 Rationale

Wheatbelt South, as part of the Wheatbelt region, is one of the major agriculture producing areas in the country. Broad acre agriculture and livestock product are likely to continue to underpin agricultural activity in the Wheatbelt South along with associated storage and processing activity. There are also emerging horticultural opportunities in the sub-region, owing to comparatively stable rainfall and future climatic conditions.

4.1.2 Drivers and Trends

The global market is projected to experience an increased demand for food, particularly from the developing countries where growing populations, higher incomes and urbanisation are driving greater per capita food consumption[32]. Per capita consumption is projected to expand most rapidly in Eastern Europe and Central Asia, followed by Latin America and other Asian countries.

At the same time, global food production is projected to grow at only 1.5% per annum on average over the coming decade. A combination of limited expansion of agricultural land, rising production costs, growing resource constraints and increasing environmental pressures are the main factors behind the trend. This rate of growth is insufficient to meet the 60% increase in food production required to meet rising global demand for food over the next 40 years (by 2050[33]). Bulk food commodity producers like Australia are therefore uniquely positioned (relative to other net food exporters) to service these markets, from both geographical proximity and quality/reputation perspectives.

The demand for protein is projected to be particularly high and this will, in turn, require further significant increases in cereal production, to support intensive livestock production. The impact of increased protein

[32] OECD-FAO (2013), OECD-FAO Agricultural Outlook 2013-2022, Organisation for Economic Co-operation and Development, Paris and Food and Agriculture Organisation, Rome
[33] FAO (2009), FAO How to Feed the World in 2050, FAO High-Level Expert Forum, 12-13 October, Rome

demand will be felt across the agricultural sector, which will extend to farm inputs, production, post-harvest, logistics, supply chains and distribution channels. Livestock, including the raising of beef cattle, sheep (lamb and mutton) and goats, is well suited to Australia due to the large expanses of grazing land. Overstocking, poor land management and short-term market volatility in the past have undermined the sustainability of this industry and reduced its contribution to the overall agricultural mix.

Increased seasonal volatility as a result of climate change is expected to undermine production certainty in the Australian agricultural sector. These findings highlight where management may be adjusted by different planting times, new fertiliser regimes, farming systems or alternative crops[34]. Therefore, enhanced farm management techniques (such as Yield Prophet WA, Innovation Forums and farm resilience practices) will allow farmers to adjust operational and input expenses to seasonal changes in predicted yields[35].

4.1.3 Sub-Regional Characteristics

The Wheatbelt South has vast agricultural landscapes and a temperate climate with hot, dry summers and predominantly winter rainfall. The annual average rainfall in Wheatbelt South is around 400mm with higher average rainfall occurring in the western parts of the sub-region[36].

Broadacre grains (wheat, barley, oats and canola) represent the major source of agricultural production in the Wheatbelt South. Since 1999, the Wheatbelt South sub-region has averaged an annual production of coarse grains of almost 1.1 million tonnes[37]. However this production has been highly volatile with production varying from as high as over 1.8 million tonnes in 2003/04 to a low 550,000 tonnes in 2010/11. This is illustrated figure below.


Courtesy of P Gooding

[34] DEC (2103), Climate Change Case Studies: Agriculture, Department of Environment and Conservation, Perth
[35] DAFWA(2012), A Year in Grains 2011, Department of Agriculture, Perth
[36] BOM (2013), Climate Data, Bureau of Meteorology, Canberra.
[37] CBH (2013) Unpublished Production Data, CBH, Perth

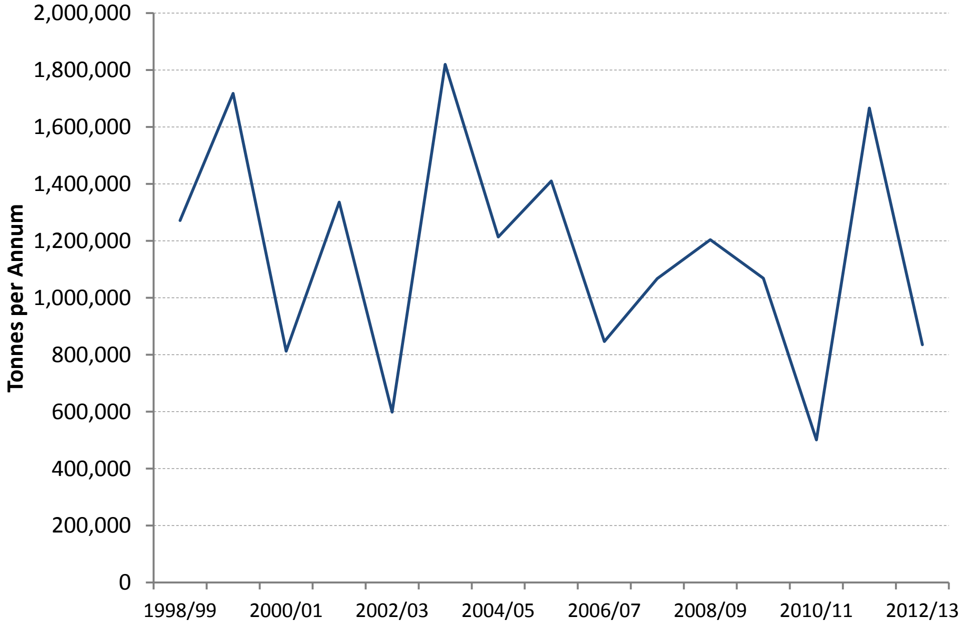

Figure 15 : Annual Coarse Grain Production, Wheatbelt South

Cereal production is primarily concentrated in the Shire of Lake Grace, accounting for a quarter of the sub-region's tonnage delivered (25.8%) in 2012/13. This is followed by one quarter in Kulin (14.9%), Kondinin (10.7%) and Dumbleyung (10.1%). All of these LGAs are in the east of the sub-region and also account for large shares of total hectares sown in 2012/13. This is illustrated in the figure below.

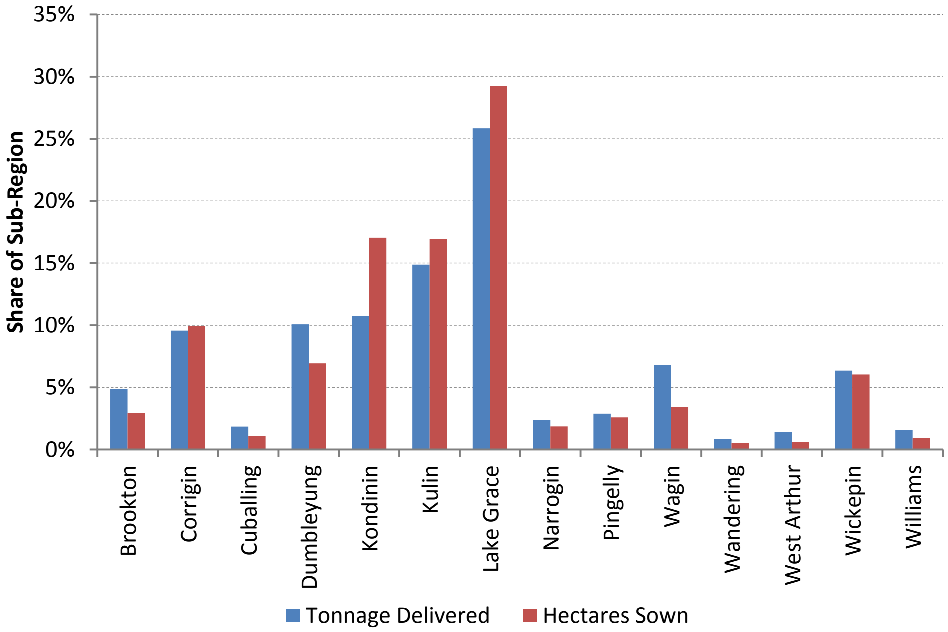

Figure 16 : Coarse Grain Production and Hectares Sown, LGA Share of Wheatbelt South, 2012/13[38]

[38] CBH (2013) Unpublished Production Data, CBH, Perth

Despite this broad alignment, yields vary significantly across the sub-region, with lower production per hectare in eastern Shires due to more marginal soil types and less consistent rainfall. This reflects the fact that much of the eastern part of the Wheatbelt South shares similarities with the Central East sub-region in terms of dry land coarse grains farming.

International company, Bunge Grain have invested in a bulk grain export facilty at the Bunbury Port. Bunge will provide an alternative option to bulk acess export markets for grain growers in the Wheatbelt South. Bunge is permited to export up to 500,000 tonnes of grain in the first two years of operation and storage of up to 50,000 tonnes at Bunge's Port facility at Bunbury. Bunge begins exporting in the 2014/15 grain season. Grain being transported by truck to Bunbury is predicted to increase heavy vehicle traffic movements along the Collie – Lake King Highway by 600-800 movements per year. Lime deposits at Redgate (Margaret River) and Prestons provide grain growers an opportunity to deliver contracted grain to Bunge and back fill with lime as part of agricultural production.

There are several grower groups in the Wheatbelt South involved in research and development activities including on farm trails, farm workshops that work towards future sustainability and profitability in agriculture on a local, state and national level. These groups include the Corrigin Growers Group, Facey Group (Wickepin), and the Kondinin Group. The Kondinin Group's head office is based in Perth.

Livestock continues to be a significant contributor to the sub-region's food production capacity. In 2010/11 there were over 50,000 head of cattle in the sub-region, almost exclusively comprised of meat cattle breeds[39]. There are also almost 2.8 million sheep in the sub-region, (excluding lambs) or 28% of the State's flock in 2010/11. The largest shares are located in the Shires of West Arthur, Williams and Lake Grace. Interestingly, while the first two of these Shires have very minor shares of the sub-region's coarse grain production, Lake Grace is also the largest producer of wheat (with respect to size and tonnage delivered). The processing of meat for the domestic and export market is well established with Hillside abattoir in Narrogin processing up to 1,300 animals per day (not full capacity)[40].

Niche meat processing facilities are also established at Corrigin (Windmill meats), Hyden (BJ and JA Haslam) and Narrogin Agricultural College[41]. There are also opportunities for the Wheatbelt South to benefit from processing of both cattle and sheep for the export market in the South West (V&V Walsh, Bunbury) and Great Southern (WAMMCO, Katanning).

This livestock sector is supported by local feed production, with over 50,000 hectares of cereal grains cut for livestock feed, producing 140,000 tonnes of hay. Horticulture is a small but emerging sector of food production in Wheatbelt South, and is currently concentrated on fruit orchards (olives and grapes) in Lake Grace (2,735 trees in 2010/11), West Arthur (3,182 trees) and Williams (4,512 trees). The vast majority of this horticulture is in olives, with small Pistachio nut production (1,095 trees in Williams LGA) accounting for almost 30% of the State's production.

[39] ABS (2013) Value of Agricultural Commodities, 2010/11 Cat No 7503.0, Australian Bureau of Statistics, Canberra
[40] Hillside (2014) Hillside Abattoirs access at http://www.hillsideabattoirs.com.au/ on 30 June 2014
[41] WAMIA (2014) WA Meat Processors by Species access at http://www.wamia.wa.gov.au/node/124,on 8 July 2014

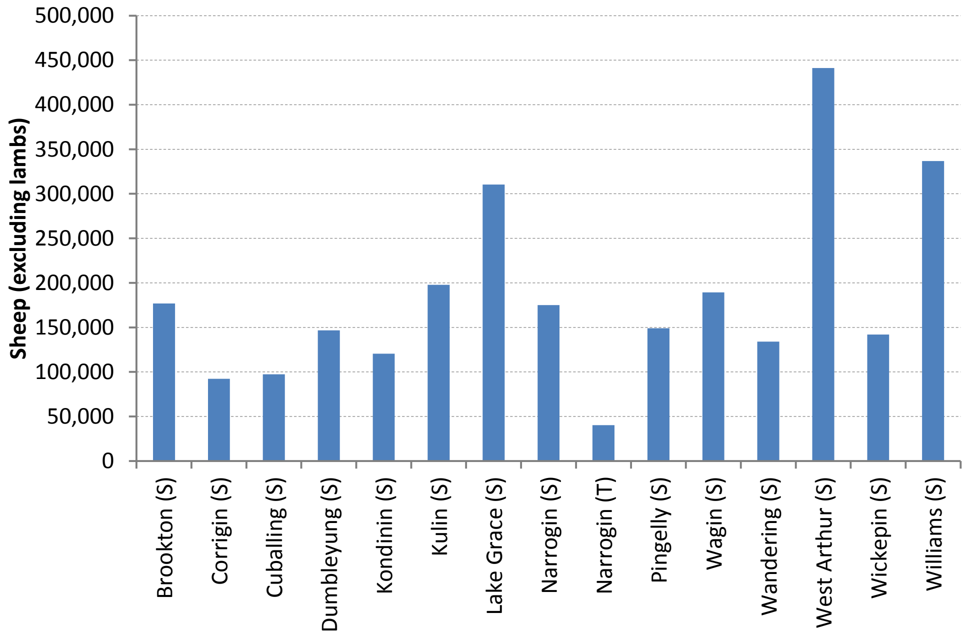

Figure 17 : Number of Sheep (excluding Lambs), Wheatbelt South LGAs, 2010/11[42]

4.2 Health & Education

4.2.1 Rationale

Regional and rural communities generally do not possess a critical mass of population services, like ancillary and tertiary health care and secondary and applied tertiary education. Where they do exist, such a critical mass of quality services presents a considerable opportunity to attract and retain new residents to a town and broader sub-region. With an ageing population, demand for a diverse range of community services is expected, including aged care, hospital and community care. This is expected to generate new employment opportunities. However, greater education and training capacity is required in regional communities to address local skills shortages and leverage the key competitive advantages of the sub-regional economy. This includes greater integration of secondary and tertiary education and training with local business and industry.

4.2.2 Drivers and Trends

Over the next few decades, it is expected that the ageing of Australia's population will see the share of residents aged 65+ increase from around 13% in 2010 to 20% in 2040[43]. This will present Australia with several economic opportunities in the health care and social services to cater for an ageing population. Health is the equal largest employing sector in the WA economy, generating tertiary qualified and knowledge intensive employment opportunities in primary, general and acute health care and social service delivery. It will also present challenges in terms of health and care-based service provision, with demand for hospital and aged care beds expected to accelerate rapidly.

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[42] CBH (2013) Unpublished Production Data, CBH, Perth
[43] Treasury (2010), Intergenerational Report 2010, Commonwealth Government, Canberra

Education demand is expected to continue to grow rapidly in Australia, despite the ageing of the population. Strong economic growth in the medium to long-term, particularly in regional Australia will intensify demand for skilled workers. Unemployment in the Wheatbelt South sub-region is generally low, especially in more rural and agriculture-based communities. Growing local economies will require not only increased population and labour force growth, but also greater levels of skills development. This will drive demand for expanded local and regional tertiary education facilities, effective transition of students from secondary to tertiary education and effect integration with growing industry skills needs. At the same time, *education and training options* in regional WA was identified in the Living in the Regions 2013 survey as having the lowest level of satisfaction among regional residents of the State[44]. Addressing this inadequacy in education and training offering will require more than simply new schools and TAFEs. It will require different levels of education and training to streamline student transitions, the adoptions of new telecommunication technologies to improve access to rural and remote students and effective integration with industry to ensure the relevance and applicability of skills.

4.2.3 Sub-Regional Characteristics

The Wheatbelt South currently has an older population, with 16.0% of the residential population aged 65+. This is considerably above the State average of 12.3% and high compared to other sub-regions. However, not all towns have uniformly aged populations with Shires such as Brookton (23.2%) having the highest in the sub-region, and the Shire of Narrogin (10.5%) having the lowest[45].

Currently, hospital and aged care bed capacity is concentrated in the town of Narrogin, though other Shires within the sub-region are also home to some local level health and aged care facilities. The distribution of hospital and aged care facilities is highly aligned, reflecting the interrelationship between the different levels of health care provision in the sub-region. Shires, such as Wandering, which border Perth also access facilities available outside of the sub-region, including specialist services delivered in Armadale.

The sub-region already has a Health and Emergency Services Precinct located in Narrogin to fulfil the primary role in health care provision in the Wheatbelt South. However, it will be crucial to expand these facilities available in and around Narrogin Regional Hospital to cater for increasing demand associated with an ageing population. The provision of such a centrally located primary health care delivery model also has the potential to support outreach and telehealth service delivery throughout the sub-region, with Narrogin playing a specialist and administrative role for health and aged care services. As an example of outreach support and telehealth service delivery, part of the Royalties for Regions Southern Inland Health Initiative, investment has been made into Emergency Telehealth Services (ETS) across Narrogin, Corrigin, Dumbleyung, Kondinin, Lake Grace, Pingelly and Wagin Hospitals. The service utilises secure videoconferencing technology to link regional emergency patients to specialist emergency physicians based in Perth[46]. Across the 34 ETS sites in Western Australia over 6,700 consultations have occurred since its inception in August 2012[47].

In terms of education, the sub-region currently has a below average share of its population participating in tertiary education. In 2011, 2.5% of Wheatbelt South residents were participating in TAFE or University

[44] DRD (2014) Living in the Region 2013 – State Report, Western Australian Government, Perth

[45] ABS (2011), Census of Population and Housing, 2011, Australian Bureau of Statistics, Canberra

[46] Department of Health (2014) Southing Inland Health Initiative – Narrogin, access at http://www.health.wa.gov.au/southerninland/docs/Narrogin.pdf on 8 July 2014

[47] Southern Inland Health Initiative, 'ETS pioneer to lead major expansion', enewsletter, 2014, received: 5 June 2014

education and training, compared to 3.3% for the Regional Western Australia[48]. The participation rate varies considerably across the sub-region, from less than 1% of residents in Brookton to 3.5% (above the Regional WA average) in the Narrogin township. This is illustrated in the figure below.

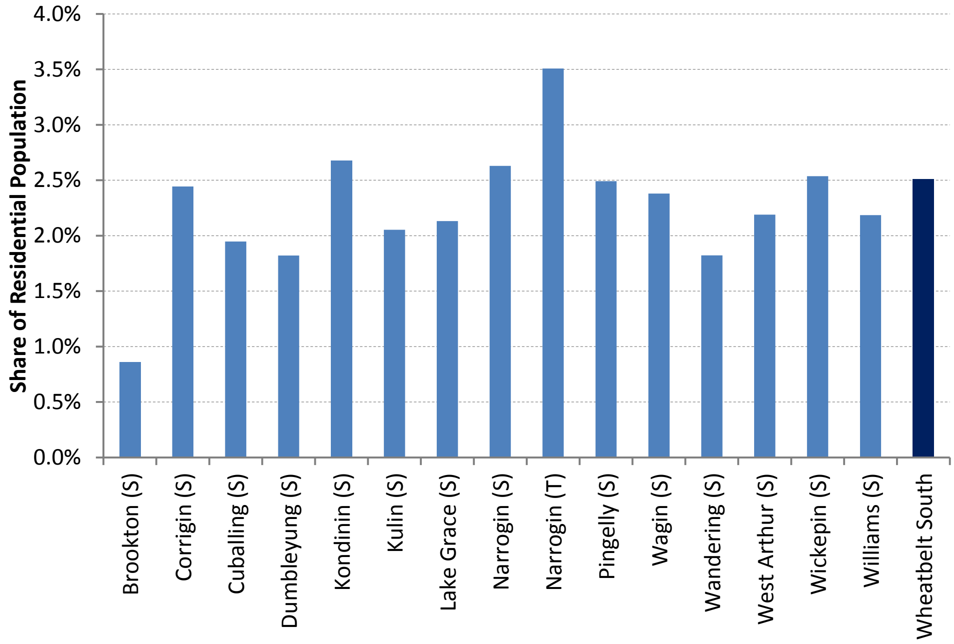

Figure 18 : Tertiary Education Participation Rates, Wheatbelt South LGAs, 2011

This variation is expected due to the concentration of tertiary education facilities in Narrogin. Such a distribution is important, as a central tertiary education precinct is required to service the entire sub-region, due to the size of the residential population. However, as outlined in section 3.5.2, there is an opportunity to leverage this concentration in tertiary education offering to improve the integration with secondary schooling in the sub-region, facilitating the transition of students into local TAFE and university education offering. This will assist to help retain young adults in the Sub-Region, addressing this current demographic loss which impacts local labour force availability and population age profile.

There is considerable university involvement in the Wheatbelt South through the Rural Clinical School in Narrogin and the Pingelly Future Farm. The Narrogin Rural Clinical School is one of fourteen schools across the State which is an education partnership between the medical schools at UWA and Notre Dame. The major aim of the Rural Clinical School is to attract more Doctors to rural, regional and remote practice. Participating medical students spend a year in Narrogin as part of their academic and clinical study. The UWA Future Farm 2050, opened in 2009, is a multidisciplinary project based on a 1600-hectare farm near Pingelly, Western Australia. The mission of the farm is to develop a profitable mixed-enterprise operation at the cutting edge of practical technology for cropping, animal, environmental footprint, and ecosystem and biodiversity management[49].

Education is a major employer unto itself and there are opportunities for Narrogin to play the role of a genuine regional education centre in the south west of the State. Toowoomba in Queensland and Ballarat in

[48] ABS (2011), Census of Population and Housing, 2011, Australian Bureau of Statistics, Canberra
[49] UWA (2014) Future Farm 2050, accessed at http://www.ioa.uwa.edu.au/future-farm-2050 on 30 June 14

Victoria are effective examples of major regional centres that have established reputations as quality secondary and tertiary education providers. This regional education model would require increased investment in student accommodation, to allow students from smaller communities a place to reside for education, but remain in the broader region. This model would also increase the quality of secondary and tertiary education on offer in the sub-region, and provide leverage for wider demand to provide improved quality and diversity of education and training across the Wheatbelt South.

4.3 Lifestyle, Amenity and Retirement

4.3.1 Rationale

Regional cities and rural communities play a key role in driving growth and prosperity in Western Australia. As well as being home to West Australians who choose to live outside Perth, the regions make a significant contribution to our State's economy and play a critical role in the Western Australian Government's vision to achieve balanced growth across the State. Rapid technological change and emerging markets in the global economic environment offer Western Australia's regions significant opportunities to capitalise on their competitive strengths. Such developments will promote economic development, create job opportunities and improve environmental land use. This will benefit rural communities and enhance the standards of living in rural areas.

The need to increase residential population of the Wheatbelt South and provide increased workforce capacity for major industries requires the sub-region's attractive lifestyle to be promoted and leveraged. An opportunity exists to position the Wheatbelt South sub-region as a residential location of choice for a diverse range of households – from young families to retiree households. Effective provision of quality community facilities (such as health and education examined in section 4.2), affordable retirement and lifestyle-based accommodation as well as diverse retail offering are essential to attracting and retaining this new population.

4.3.1 Drivers and Trends

Throughout the developed world, population growth has become spatially concentrated in the urban regions surrounding major urban centres. It is expected that by 2050, world population will increase to almost 9.3 billion. This will create new national and global economic and social forces which will reshape national geographies in general and the characteristics of cities in particular. The result will be a range of diverse social and spatial outcomes, including greater differentiation across, within and between cities.

Along with increases in global population levels, Australia's population is also expected to increase. In December 2012, Australia's population was 22.9 million, which has significantly increased by 3.3 million, or 16.8% over the last decade[50]. Part of this growth in population was through natural increases, which rose by 35.3% during this period. However, the majority of growth was from net overseas migration, which increased by 113.5%, accounting for almost 60% of total increase in population. Further, based on 2050 projections, endogenous demand for new workers in Australia is likely to guarantee increases in the level of net overseas migration to be more than 100,000 per annum[51].

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[50] ABS (2012), Australian Demographic Statistics Cat No 3101.0, Australian Bureau of Statistics, Canberra
[51] CEDA (2012), A Greater Australia: Population, Policies and Governance, Committee for Economic Development Australia, Melbourne.

It is expected that this growth will result in the cost of living and quality of life in Australia's major cities to come under pressure. Unaffordable housing, traffic congestions and travel times and increased crime are already factors that significantly influence the decisions by households as to where to live. These factors are expected to worsen in the medium term, which will further enhance the relative attractiveness of regional and rural areas. In Western Australia, these trends have already started to emerge. Over the decade to 2012, growth in regional areas (20.2%) has broadly kept paced with that of the major cities (27.8%) in Western Australia.

The results of the Living in the Regions 2013 survey revealed a diverse range of characteristics of regional WA communities that rate better than metropolitan Perth. These include:

- Community connectedness;
- Happiness;
- Health and general wellbeing;
- Lifestyle;
- Safety; and
- Sense of community[52].

The Wheatbelt Region generally recorded the highest scores in the State against safety, sense of community and connectedness. This translates to the highest level of volunteerism, sporting and community participation.

However, just as there are reasons why people are attracted to regional WA, so too are there reasons why people leave. Better access to shopping was identified in the Living in the Regions 2013 survey as the number one reason why survey respondents might leave regional WA. This highlights the importance that quality local retail can have in attracting and retaining residential populations, by minimising travel time and costs for local residents and providing a destination for experiential expenditure, including cafes and restaurants.

Since the GFC, overall household expenditure levels have rebounded. However a combination of changing expenditure patterns and increased competition from online retail has continued to impact shop-based retail performance. Over the past decade, non-discretionary retail (e.g. food) share of household expenditure declined marginally as household incomes and purchasing power grew at a faster rate than core retail demand. The standout growth in share of household expenditure has been in recreation and culture and hotels, cafes and restaurants. Both of these categories have increased in their shares consistently over the past decade, as the maturing of the Western Australian consumer market has accelerated demand for more experiential services. This is illustrated in the following figure.

[52] DRD (2014) Living in the Region 2013 – State Report, Western Australian Government, Perth

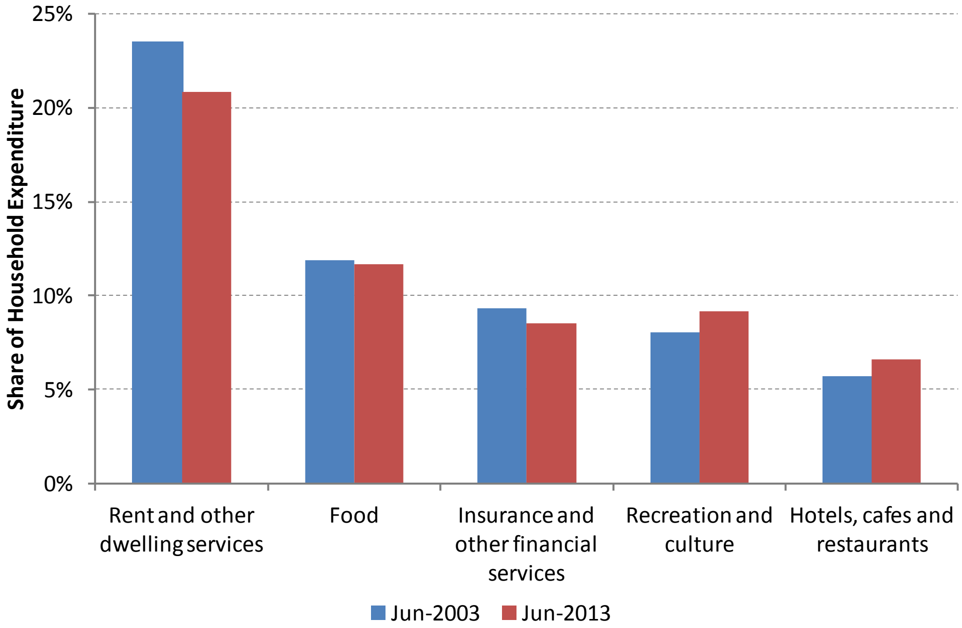

Figure 19 : Category Share of Total Household Expenditure, WA, June 2003 and June 2013[53]

Further, with many economies in Europe and North America experiencing significant declines in growth, Australia has become of more interest to many global retailers. In particular, Western Australia has had one of the highest retail trade growth rates (4.3%), which is much higher than the national average (2.8%).

In all locations, retail viability and sustainability can be enhanced through improvements to local public realm amenity. Improvements in pedestrian amenity can help retain greater levels of local retail expenditure and leverage increased visitor expenditure by improving the quality of "main street" and other retail environments. It can also enhance the work environment for service workers, improving the attractiveness of the location for businesses in the professional services sector. Local amenity improvements can include land and street scaping as well as consolidation of land parcels and uses in town centres.

In addition, housing diversity is an important contributor to local lifestyle. Regional communities traditionally have low housing diversity levels, with a concentration of separate detached housing. This is normally due to the availability of lower cost, serviced residential land. This is reflected in the most recent Regional Price Index report produced by the Department of Regional Development, which showed that housing costs in the Wheatbelt are on average 96.3% that of metropolitan Perth, with Narrogin at 94.4%[54]. However, with improved construction methods, medium density development is becoming more viable in regional communities as the benefits of lower land costs dissipate due to higher infrastructure servicing costs. This creates the opportunity for greater housing diversity to be provided in the sub-region, catering to the needs of an increasingly segmented market.

The ability of towns to attract and retain younger age groups, students, retirees and key workers is increasingly dependent on the diversity of housing offered in the local market. Providing greater levels of

[53] ABS (2013), Australian National Accounts: National Income, Expenditure and Product Cat No 5206.0 Australian Bureau of Statistics, Canberra
[54] DRD (2013) Regional Price Index 2013, Western Australian Government, Perth

exposure to different housing product can also assist in increasing local community acceptance of higher density living, providing genuine choice to existing and new residents.

4.3.2 Sub-Regional Characteristics

The Wheatbelt South sub-region briefly adjoins the south-east of Perth with the Shire of Wandering being less than a two hour drive from Perth City where much of the sub-region is less than two hours' drive from the metropolitan centre of Armadale. The sub-region provides a diverse range of economic opportunities that promotes business growth while providing current and future residents the advantages of rural living, such as a safe environment, access to quality health and education services, and a strong sense of community.

In the 2012-13 period nearly all Wheatbelt South Local Government's experienced an increase in building approval rates, except for Kondinin, where there are already a number of vacant houses. The Shires of Cuballing (15%) and Wagin (15%) had the highest residential building approvals, followed by the Shires of Pingelly (10%) and Williams (8%), which account for almost half of all building approvals in the Wheatbelt South sub-region. This is illustrated in the following figure.

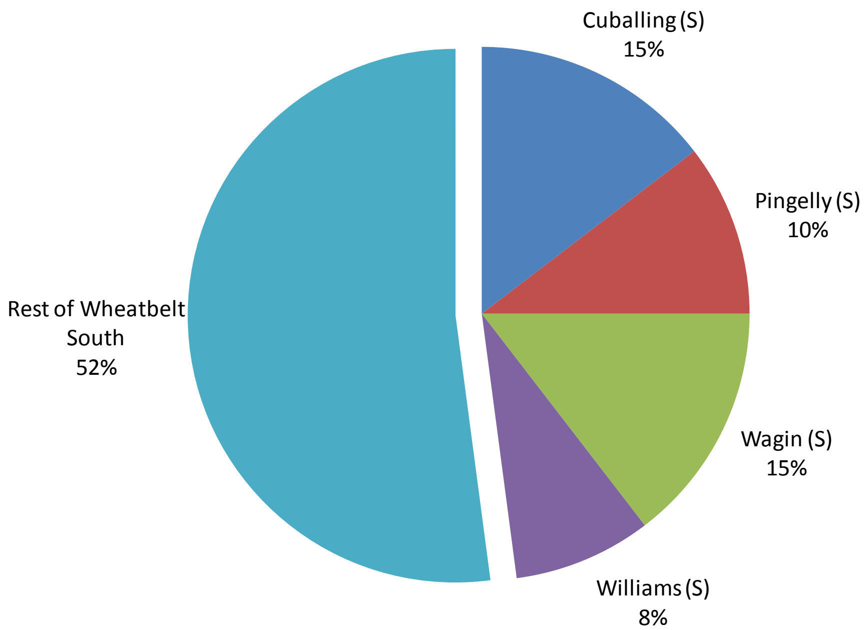

Figure 20 : Residential Building Approvals, 2012-13, Wheatbelt South Sub-Region[55]

A key driver for higher building approvals is the increased demand for rural residential development, particularly in agriculture and lifestyle locations. The Shires of Brookton, Wandering and Williams are all peri-urban locations adjacent to the Greater Perth and Peel regions. This proximity to Perth presents considerable opportunity in the medium term for these Shires to provide affordable, lifestyle oriented residential accommodation options for current Perth residents seeking change (due to lifestyle or age-related reasons). As Perth's south eastern suburbs Armadale, Kelmscott and Gosnells gain a greater retail and

[55] ABS (2013), Building Approvals Cat No 8731.0, Australian Bureau of Statistics, Canberra.

medical specialist offering, the communities in the Wheatbelt South within a 2 hour drive of these developing suburbs will increasingly be considered as desirable lifestyle locations.

Another factor is the increasing need for better quality housing to cater for FIFO and DIDO mining workers. The residential locations of households can be influenced by the policy of businesses, such as the Newmont Gold Mine at Boddington having initiatives in place to encourage workers to live within 50km of the mine site. The Shires of Wandering and Williams are within this distance, providing potential opportunity to act as residential locations of choice for mining workers and their families. Continuing improvements in access (via Tonkin Highway) to Perth domestic airport also support those choosing to fly-in fly-out to other mining areas.

Cuballing's residential growth reflects the Shire's potential as a highly desired satellite community of Narrogin. Such proximity provides residents with access to the high quality sport and recreation facilities in Narrogin as well as local employment opportunities. The Shire also benefits from being home to the Dryandra Regional Equestrian Park, supporting equine based industry and employment activity.

Towns in the Wheatbelt South sub-region have experienced below average growth in household incomes according to the most recent Census. Between 2006 and 2011, incomes grew at an annual average rate of 3.1%, which is below the state average of 5.8%. However, income growth varied significantly throughout the sub-region, from -1.4% in Kulin to 9.4% per annum in Wandering[56]. As a result of this growth, household income levels in the Wheatbelt South ($49,358) in 2011 which remained below the State average ($73,580). This is illustrated in the following figure.

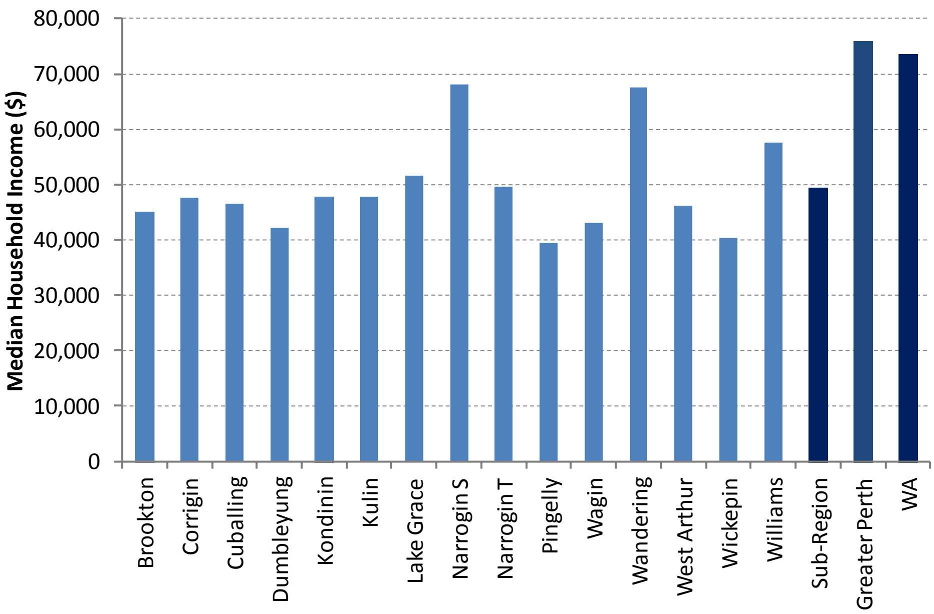

Figure 21 : Median Household Incomes, Wheatbelt South Sub-Region and WA, 2011

Lower incomes however do not necessarily translate to lower retail expenditure levels if local costs of living are below average. This appears to be the case for the Wheatbelt South. In 2011, all towns in the sub-region had house prices below the median for Perth, which were more affordable relative to local income levels. This lower housing cost level potentially means proportionally greater levels of disposable income for

[56] ABS (2012), Census of Population and Housing 2011, Australian Bureau of Statistics, Canberra

Wheatbelt South households, increasing demand for retail goods and services. The results of the Regional Price Index for 2013 however, reveal that the costs of other common items of expenditure are above the metropolitan Perth average. These include clothing, health care and transport. Food and household equipment/furnishings are below the metropolitan average.

Narrogin is home to the largest concentration of retail businesses in the sub-region. In 2012, the Narrogin Statistical Area[57] was home to 56 locally registered retail businesses[58] or some 30.7% of total retail businesses in the Wheatbelt South sub-region. Note this does not include higher order, State and national retail chains, which are also more prevalent and common in Narrogin than the remainder of the sub-region.

This concentration of higher order retail in Narrogin will mean other communities will likely continue to accommodate mostly convenience, niche and local servicing retail offerings. The mix and scale of such offerings will also be dependent on the local market critical mass, with larger Shires like Wagin, Lake Grace, Pingelly and Corrigin able to sustain larger retail offerings than smaller communities like Wandering, Dumbleyung, Wickepin and Kulin. Local exposure to tourism activity and expenditure will also play an important role in driving the scale and diversity of local retail offering. This presents Shires such as Kondinin and Williams with a significant opportunity to leverage tourism expenditure to enhance the quality of retail for local residents in the medium term. The Wheatbelt Business Network is seen as an important networking and support organisation for small business, particularly to the shires in the north eastern part of the Wheatbelt South. The Wheatbelt Business network will continue to expand its services regionally for small businesses across the Wheatbelt.

4.4 Tourism

4.4.1 Rationale

The rural lifestyle and amenity of the natural and built environments of the Wheatbelt South provides enormous potential for the sub-region's tourism sector. The expenditure associated with visiting tourists provides economic benefits to local communities by leveraging on existing infrastructure and amenity and subsidising a higher quality of retail, accommodation and public infrastructure, which local residential expenditure alone would not be able to support.

4.4.2 Drivers and Trends

The tourism investment pipeline (new short-stay accommodation, attractions and facilities proposed by the private sector) is estimated at $44.1 billion in Australia in 2012, an increase of 22%[59] in pipeline investment over the year. This level of investment clearly indicates the enormous potential of the tourism sector and highlights both the importance and attractiveness of investing in key tourism-related activities. Further, with the likely moderating of mining and energy investment from record levels it could also mean that the tourism industry will likely have greater access to capital and labour.

The Wheatbelt South sub-region between 2008 and 2012 attracted an average 307,800 tourists/short-term visitors per year[60], representing an average 17 visitors per resident. This is well above the State average of

[57] Includes Narrogin Town LGA and parts of Narrogin Shire LGA, including the communities of Narrogin Valley, Hillside, Dumberning and Minigin.
[58] ABS (2013), Count of Businesses, 2012, Australian Bureau of Statistics, Canberra
[59]TRA (2013), Tourism Investment Monitor 2013, Tourism Research Australia, Canberra
[60]TRA (2013), Online Data Sets NVS and IVS, Tourism Research Australia, Canberra

8 visitors per resident, highlighting the strong performance of the sub-region in spite of the small population. Approximately 59% of visitors to the Wheatbelt South were day trip visitors, with the domestic overnight visitors accounting for 38%. This reflects the fact that tourism in the Wheatbelt South is characterised predominantly by day trip visitors. This is illustrated in the following figure.

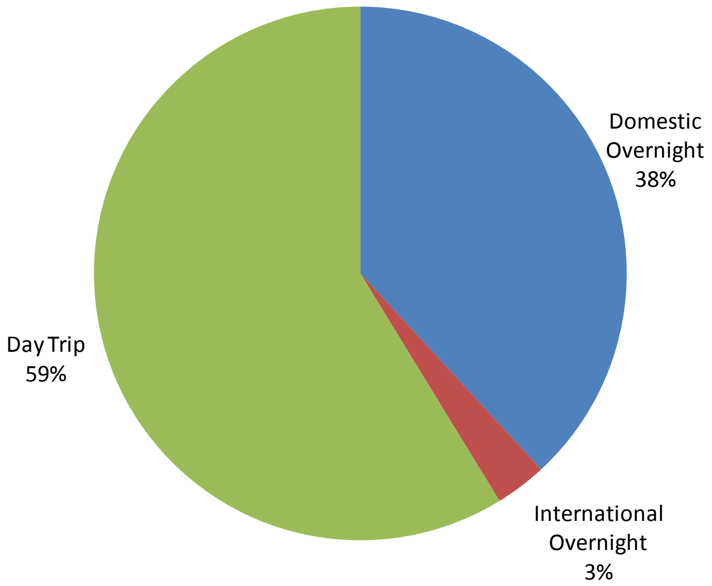

Figure 22 : Breakdown of Visitors to Wheatbelt South Sub-Region, by Type, 2008-12

The proximity of the Wheatbelt South to metropolitan Perth, its primary domestic market, means the predominance of day trip visitation is likely to continue in the future. However, maximising the sub-region's exposure to overnight and multi-day visitation is critical to increasing the economic value of tourism in the local market.

The older populations, referred to as "Grey Nomads" represent a growing demand for tourism related activities and the Wheatbelt South, with its safe, rural lifestyle, provides popular retreats for this market segment. Also, there will be increase in demand from international tourists, as visitation numbers are expected to increase with the burgeoning economies of developing nations over the next few decades, particularly from Asia. The higher average expenditure profile of international tourists means that only a small increase in visitation levels from the current base will provide a significant increase in local tourism value add to the economy. However, this segment of the market requires quality (4 and 5 star) accommodation and structured packages for experiential tourism activities. Improved multi-lingual skills among workers and culturally-sensitive practices will also enhance tourist experiences, leading to increased international visitation.

4.4.3 Sub-Regional Characteristics

The Wheatbelt South sub-region already possesses a diverse offering of tourism attractions and activities, including but not limited to:

- Dryandra Woodlands;
- Boyagin Rock Walk and Natural Reserve;
- Agricultural Expos (Wagin Woolorama, Williams and Newdegate annual events);
- Wave Rock;
- Lake systems (Lake Yealering, Lake Towerninnig (Darkan), Dumbleyung Lake, Lake Grace).

- Hillman Farm Skydiving;
- Mount Cooke and Bibbulmun Track;
- Holland's Track Outback 4WD Drive;
- Kukerin Creekbed Races;
- Corrigin Rock Trail;
- Brookton Old Time Motor Show;
- Albert Facey Homestead ;
- Great Western Woodlands;
- Camp Kulin;

Wave Rock is a major tourism icon for WA and by far the most popular tourist attraction in the Wheatbelt South sub-region. A natural rock formation in the shape of an ocean wave approximately 14m tall and over 100m in length is located near the town of Hyden in the Shire of Kondinin. Believed to have formed over 2700 million years ago, Wave Rock is part of the northern face of Hyden Rock. The shape of the wave is formed by gradual erosion of the softer rock beneath the upper edge, over many centuries[61]. The Wave Rock is the largest of a number of similar, albeit smaller examples of this geological phenomenon in the sub-region. Wave Rock attracts over 140,000 visitors per year who are supported by a diverse range of local accommodation options and services. In addition to Wave Rock visitors also enjoy other attractions of the broader Hyden Wildlife Park, including Aboriginal tours and heritage attractions, wildflowers and Australian fauna.

Great Western Woodlands contains the largest and healthiest temperate woodlands remaining on earth. The region covers approximate 16 million hectares from the southern edge of the Wheatbelt to the pastoral lands of the goldfields in the north and east the Nullarbor Plain[62] . Opportunities exist to develop tourism infrastructure in the Great Western Woodlands to support an already growing tourism activity particularly four wheel driving. Management of visitors is essential to maintain the sustainability of this unique and internationally significant habitat.

The Dryandra Woodlands, is another unique and popular natural attraction in the Wheatbelt South. Located between the towns of Cuballing, Narrogin, Wandering and Williams, the Dryandra Woodlands covers approximately 28,000 hectares and features the largest remnant of original vegetation in the western Wheatbelt[63]. The Dryandra Woodland can accommodate a variety of visitors (Lions Village or camping) and offers a number of attractions including the Barna Mia Animal Sanctuary, self-drive audio tours, walk trails and Congolin Dam. Being within a two hour drive from Perth, close proximity to Narrogin and accessible by all vehicle types, Dryandra Woodlands can cater for both the day trip and short stay visitor.

The varied agricultural production of the region provides tourism attractions, particularly relating to wine, such as in Wandering and Narrogin (S), through to wildflowers in Wickepin and Pingelly, and walk trails in West Arthur. The sub-region also hosts a range of shows and festivals which are held throughout the year

[61] HDTC (2014), Wave Rock Information accessed at http://waverock.com.au/rock.htm on 28 April 2014
[62] A. Watson, Judd, J Watson, Lam, Mackenzie 'The Extraordinary Nature of the Great Western Woodlands' pg vi 2008
[63] http://parks.dpaw.wa.gov.au/park/dryandra-woodland, accessed: 9 July 2014

celebrating the history and heritage of the Wheatbelt South. Events such as the Wagin Woolorama and Newdegate Field Days are critically important to the sub-regional tourism market, because they not only attract visitors to the sub-region but also help to promote and brand the Wheatbelt South as an attractive, dynamic and high amenity region for visitors, new residents and investment.

However, there are limited tourism accommodation establishments, restaurants, pubs and cafes in the sub-region, particularly outside Hyden and Narrogin. Accommodation mix and quality is also limited, with convenience-level accommodation (e.g. motels, caravan parks) the most common. With two motels Narrogin tends to attract overnight stays by visiting workers and professionals servicing the Wheatbelt South.

The proximity of the Wheatbelt South sub-region to metropolitan Perth generally, incentivises high levels of daytrip travel which reduces overall demand for overnight visitation. Nonetheless, it is highly likely that a lack of diversity of accommodation in the Wheatbelt South is constraining the capture and/or conversion of travellers into overnight visitors, with associated increases in local expenditure and economic impacts.

Recently though, West Arthur (Darkan) is planning for a new caravan park with chalets and Brookton is redeveloping the caravan park with chalets and camping accommodation options, to better capitalise from more tourism expenditure (including visiting workers and professionals) within their localities.

In terms of visitor servicing and information the CRC network plays an important role in the promotion of tourism attractions and events as well as being the access point to technology and services. Marketing of the Wheatbelt South tourism sector requires a coordinated approach that links together the destinations, accommodation, eateries and events.

Wagin Woolorama

5.0 Opportunity Network Analysis

5.1 Outline

The Wheatbelt South sub-regional economy possesses a range of competitive advantages and opportunities, as identified in section 4.0. However, these advantages and opportunities manifest themselves differently across the Local Government Areas of the sub-region, with each major town possessing a unique set of demographics, business and infrastructure characteristics and therefore playing a different role in the sub-regional economy.

RPS has reviewed and analysed the characteristics of each LGA to develop a Network Matrix. This Network Matrix illustrates the spatial distribution of the Key Economic Opportunities identified in section 4.0 of the Strategy across the major Towns/LGAs of the sub-region.

Each town can have three possible relationships with the whole-of-sub-region opportunities:

- The town already has an above average competitive advantage in the relevant industry/sector and/or has existing activity leveraging this opportunity (represented as a solid circle in the matrix);
- The town has the ***potential*** to have an above average competitive advantage in the relevant industry/sector (due to either changing or emerging drivers) over the next decade (represented as a dotted circle in the matrix); or
- The town does not have an above average competitive advantage in the relevant sector.

5.2 Network Matrix

The Network Matrix results are illustrated in the diagram below.

As expected, Narrogin and the surrounding area (i.e. Narrogin Shire and Town) have competitive advantages in all economic opportunities identified, reflecting its central service centre role in the broader Wheatbelt South sub-regional economy. However, other Shires– namely Brookton, Corrigin, Kulin, Pingelly and Wagin also exhibit a strong diversity of current or potential future economic drivers, leveraging similar whole-of-sub-region drivers to that of Narrogin.

In contrast, the Shires of Cuballing, West Arthur and Wickepin have more specialised competitive advantages, with broadacre agriculture, livestock and food supply chain expected to continue to underpin local economic activity. The Shires of Kondinin (including the township of Hyden), Lake Grace, Wandering and Williams (and to a lesser degree Dumbleyung) are expected to have more unique combinations of economic drivers, with broadacre agriculture supplemented either by health and education sectors or tourism related investment and activity.

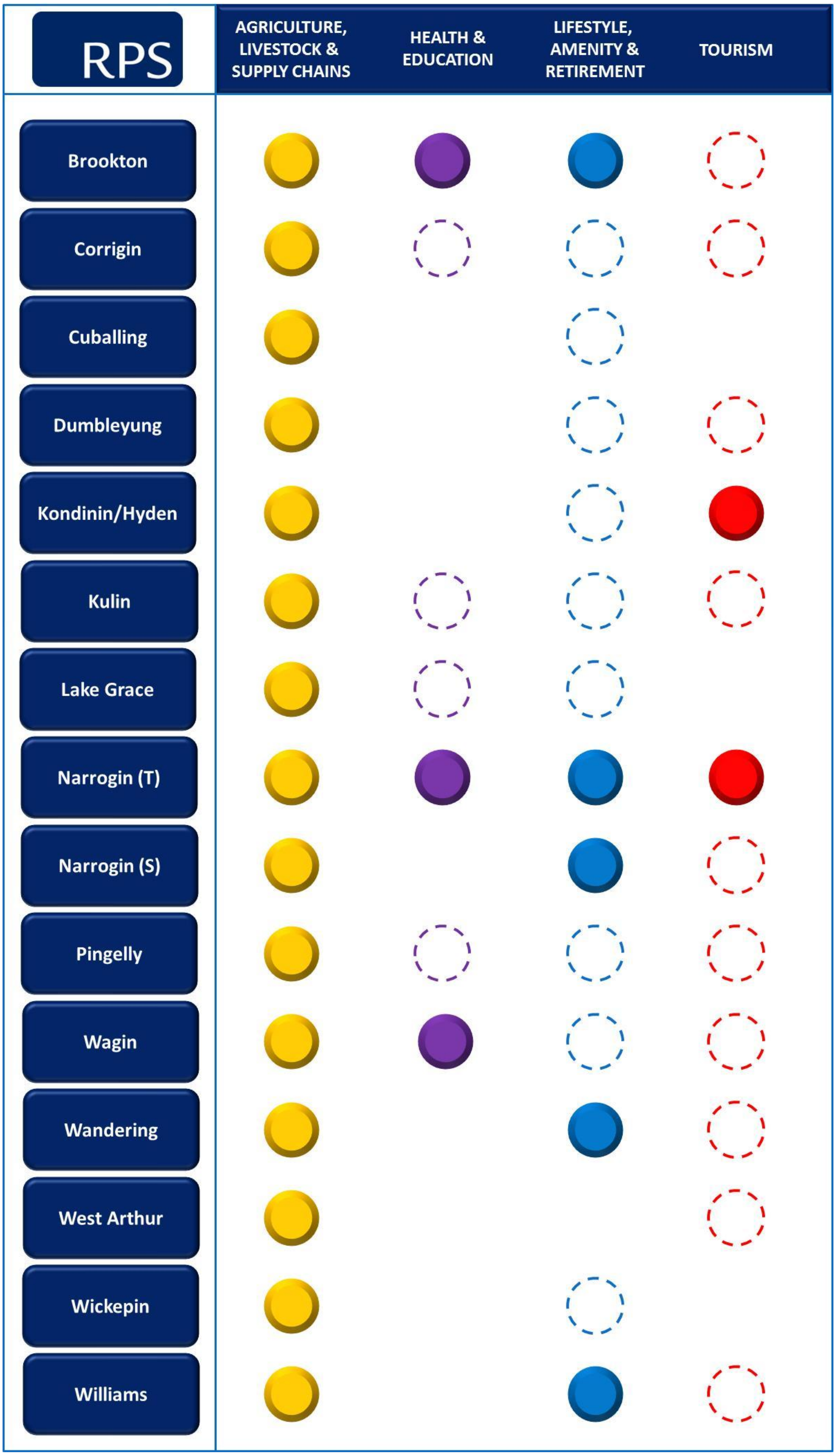

Figure 23 : Opportunity Network Matrix, Wheatbelt South Sub-Region

5.3 Spatial Analysis

The results of the Network Matrix have also been analysed for the spatial distribution of economic opportunities across the Wheatbelt South sub-region. This approach allows the relative distribution and concentration of economic opportunities to be identified.

5.3.1 Agriculture, Livestock & Food Supply Chains

As expected, agriculture, livestock and food supply chains represents the most distributed economic opportunity in the Wheatbelt South and is likely to remain the foundation industry of the sub-region in the medium and long-term.

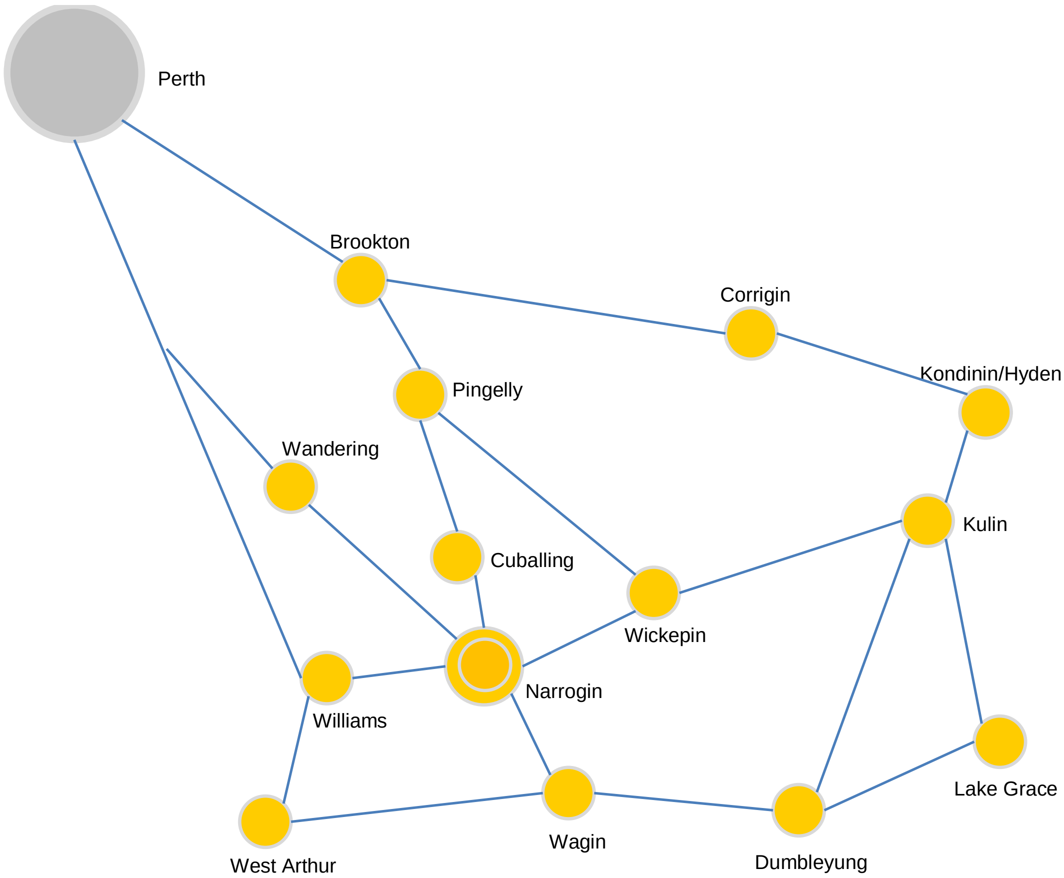

Figure 24 : Spatial Distribution, Agriculture, Wheatbelt South Sub-Region

5.3.2 Health & Education

The distribution of economic opportunities in health and education are primarily determined by a combination of current and short-term population increases, changing demographics, and the distribution of existing health and education facilities. There are opportunities to expand and improve the existing health and aged care networks to provide better facilities to all age cohorts, but particularly older residents. This will include specialised health services such as dementia care, residential care, home care, respite centre care and disability care. Education offering is expected to remain relatively concentrated, with focus on improving student transition from secondary to tertiary education and employment opportunities.

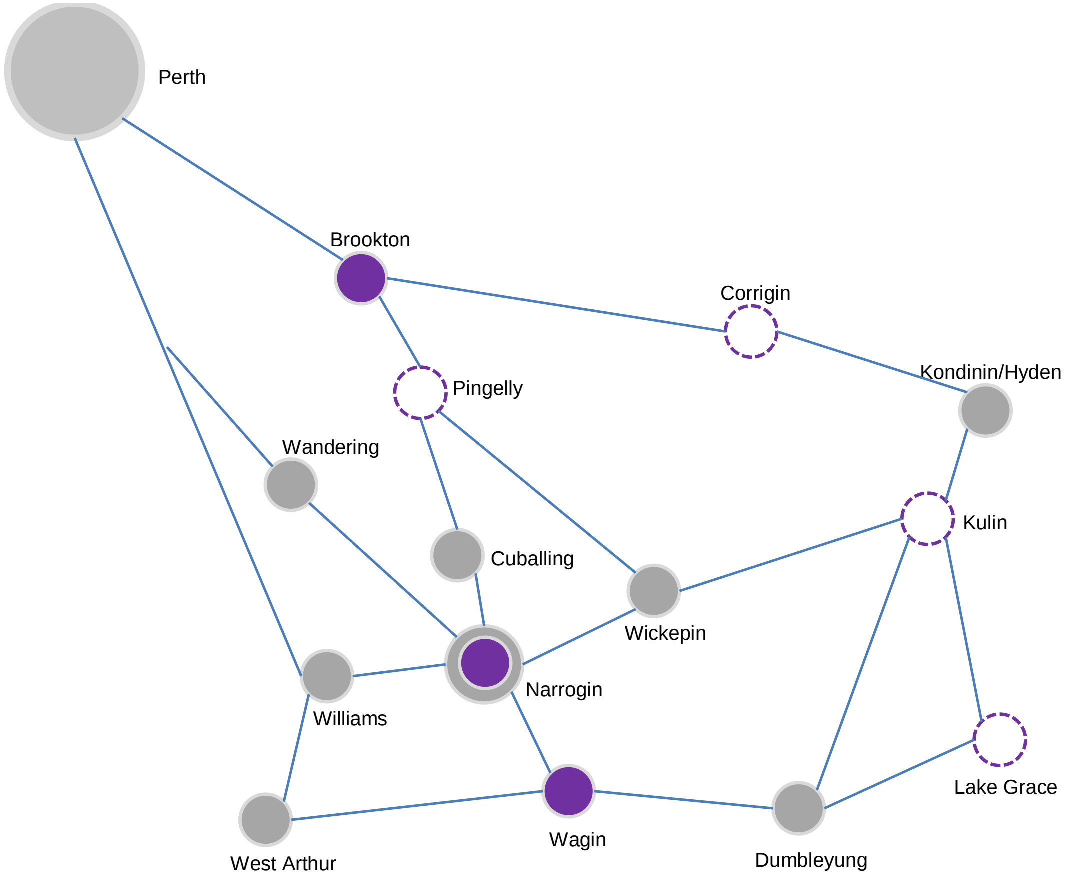

Figure 25 : Spatial Distribution, Health and Education, Wheatbelt South Sub-Region

5.3.3 Lifestyle, Amenity & Retirement

The sub-region is well positioned to capture a growing share of Perth's residents, including new migrants to reside in the Wheatbelt South. The sub-region provides affordable housing options across a diverse range of towns and is the only sub-region of the Wheatbelt to offer prospective residents peri-urban, regional centre and rural lifestyle options. Opportunities in the short-to-medium terms are likely to be concentrated on the peri-urban Shires of Brookton, Wandering and Williams as well as Narrogin.

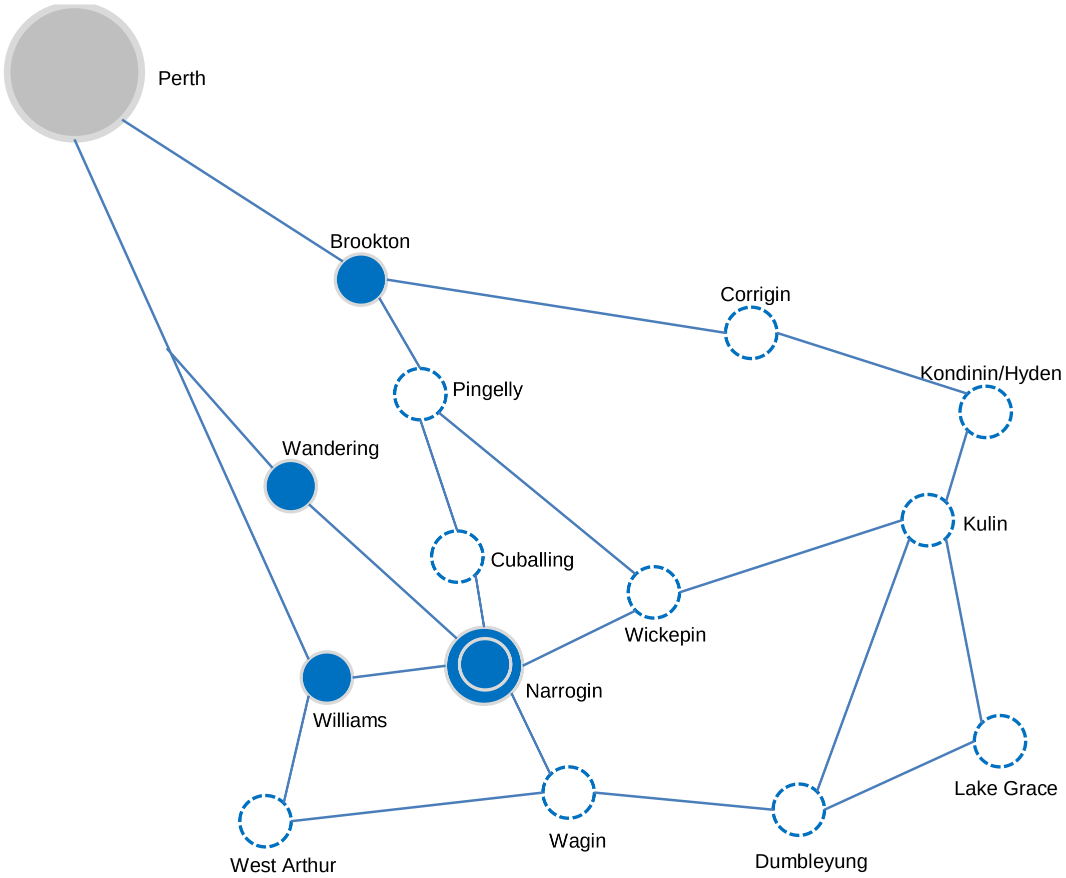

Figure 26 : Spatial Distribution, Rural Living, Wheatbelt South Sub-Region

5.3.4 Tourism

The whole Wheatbelt South possesses a diverse range of tourism offerings that collectively provide considerable choice for local visitors and should therefore be managed and promoted in a single cohesive fashion. While it is expected that the daytrip market will continue to dominate local tourism activity, the sub-region possesses a strong current and potential exposure to "Grey Nomad" based domestic tourism. This will underpin opportunities, particularly in Brookton, Kulin, Narrogin and Williams. Kondinin/Hyden will continue to be the major attractor for international visitation and transitioning this market into overnight, from day trip, represents the most significant opportunity. While not all Wheatbelt South towns have been cited as having a comparative advantage in Tourism, there is potential for all of them to increase income from the large day travellers and visiting workers.

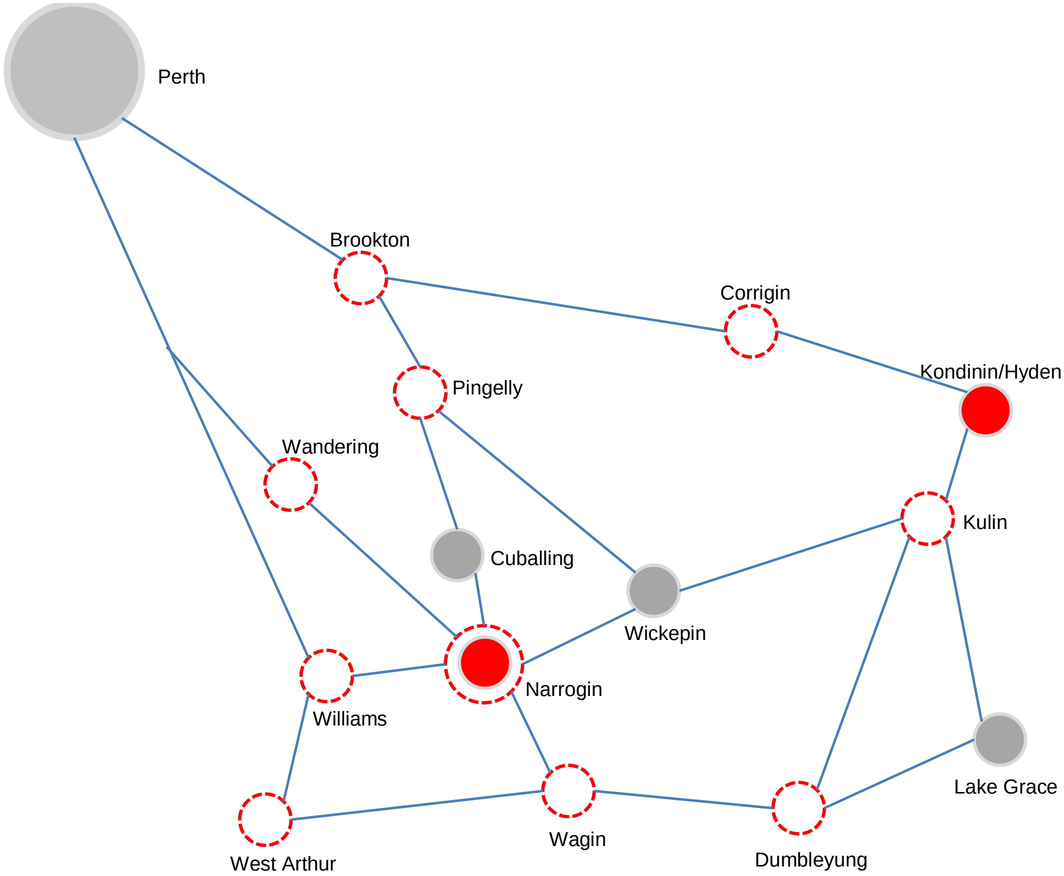

Figure 27 : Spatial Distribution, Tourism, Wheatbelt Sub-Region

6.0 Economic Development Actions

RPS, in collaboration with the WDC, has compiled a list of actions and initiatives required to facilitate, support and underpin the realisation of key economic opportunities for the Wheatbelt South sub-region identified in section 4.0 of this Strategy. These Actions have been identified through consultation with Local Government, and refined within the Spatial Distribution Framework outlined in section 5.3.

The Actions identified represent a short-list of initiatives for which business cases could be prepared for funding applications. This includes both State and Federal Government funding opportunities as well as potential private sector investment.

Further details on the individual Actions are contained in the Local Government Area Profiles, included in Appendix A of this Strategy.

Note that the identified Actions have been categorised under individual Economic Opportunities. However, it is acknowledged that some Actions will have enabling and supporting effects for a range of opportunities and for the Wheatbelt South economy generally.

Table 2 Economic Development Actions

Local Government Area	Agriculture, Livestock & Food Supply Chains	Health & Education	Lifestyle, Amenity and Retirement	Tourism	Other
Brookton	▪ Continue to support the project endeavors of the UWA Future farm in research and development into broadacre farming systems ▪ Expansion of Light Industrial site to develop Intermodel Transport hub.	▪ Develop a Regional Early Childhood Education and Care Centre collocated with the school	▪ Investigate sewage system upgrades to support intensification of residential development	▪ Investigate expansion of tourism attractions to include native walk trails and indigenous offerings to reflect natural assets and cultural ties ▪ Investigate the redevelopment and relocation of the caravan park	▪ Advocate for telecommunications upgrades to improve mobile coverage and address numerous 'black spots' across the Shire
Corrigin	▪ Progress the 'Recreation Grounds and Event Centre' project, involving the development of grounds, clubrooms and a modernised venue for the Corrigin Agricultural Society (scheduled completion June 2015) ▪ Investigate the rationalisation of zoned land, including amendments to town planning scheme to support establishment of light industrial businesses		▪ Investigate planning mechanisms to diversify housing stock	▪ Walden Park speedway redevelopment project ▪ Caravan park redevelopment project	
Cuballing	▪ Investigate the purchase of land to cater for expansion opportunities of equine activities ▪ Redevelopment of the equine cross country course ▪ Continue to form links with entrepreneurial businesses that support the equine industry and the Dryandra Regional Equestrian Centre development		▪ Review redevelopment of Town Planning Scheme, particular focus on introducing zoning for accommodating animals (i.e. horses) on rural residential blocks	▪ Investigate extension of water pipeline to support rural residential block sales, particularly east of the Great Southern railway line ▪ Investigate the feasibility to establish a caravan park in Cuballing that can also cater for the Equine sector	
Dumbleyung			▪ Continue to support the 4WDL aged care housing initiative, with the construction of two independent living units from 2014 to 2015	▪ Investigate tourism enhancement projects, including the Bluebird Interpretative Centre to complement the vessel replica development ▪ Reinvigorate and diversify tourism accommodation, focusing on 'high end' options	
Kondinin	▪ Develop marketing campaign for the Light Industrial and residential blocks at Hyden		▪ Further investment into Independent Living Units at Kondinin and Hyden ▪ Investigation into the increase of housing diversity to capture 'young singles' market ▪ Continue to support Landcorp in subdivision opportunities	▪ Redevelopment of Kondinin caravan park, including upgrades to chalets and amenities ▪ Sealing of Hyden-Norseman road to support tourism traffic ▪ Investigation into the development of Great Western Woodlands tourism interpretive centre ▪ Continue to support The Hyden Tourism Development Company in opportunities to enhance the Wave Rock 'experience'	▪ Completion and maintenance of the Kondinin Pool redevelopment ▪ Hyden Pavilion complex redevelopment
Kulin			▪ Ongoing redevelopment of the	▪ Shire office relocation project,	▪ Encourage the formation of a local business network to support Camp

Local Government Area	Agriculture, Livestock & Food Supply Chains	Health & Education	Lifestyle, Amenity and Retirement	Tourism	Other
			Town Centre, focusing on aesthetic improvements, including signage, landscaping and highlighting the heritage form ▪ Develop marketing campaign for rural-residential development	including development of new visitor centre ▪ Support Special Projects Officer role to manage events and regional initiatives (ie. Pathways to Wave Rock)	Kulin
Lake Grace	▪ Investigate development of additional grain processing and storage facility ▪ Investigate upgrade potential of Collie-Lake King Highway	▪ Monitor Lake Grace Hospital capital upgrades	▪ Continue to support the project endeavors of 4WDL Well Aged Housing Project	▪ Implement Master Plan of Shire of Lake Grace Walk Trails ▪ Increase marketing and promotion of tourism opportunities across the Lake Grace Shire ▪ Implement a signage plan to support tourism ventures	▪ Encourage mineral resource exploration through Magma Metals and Magnetic Resources Pty Ltd ▪ Investagate upgrades to telecommunication infrastructure to adress 'blackspots'
Narrogin (Town)	▪ Investigate the expansion and development of industrial and residential land	▪ Investigate the formation of an education precinct, including primary schools, senior high school and links with CY O'Connor TAFE ▪ Investigate development of dementia friendly facilities at Karinya ▪ Monitor capital upgrades to Narrogin Regional Hospital ▪ Support upgrates to the residential college	▪ Continue with plans to develop Independed Livinig Units at the old drive in cinema site to support aged care ▪ Investigate CBD revitalisation projects such as façade upgrades, building rationalisation, landscaping and development of pedestrian friendly spaces	▪ Investigate the extension of the caravan park to accommodate additional RV vehicles and chalet type accommodation ▪ Advocate to complete Narrogin Link Road ▪ Support the Narrogin airport redevelopment	▪ Advocate for telecommunications upgrades to improve mobile coverage and enable residents and business owners to flexibly telework and access markets nationally and internationally ▪ Investigate the refurbishment and re use of the Narrogin Railway Station
Narrogin (Shire)	▪ Investigation into the the feasibility of Yilliminning Agri-Precinct with DAFWA ▪ Support the completion of Wanerie Road and the Narrogin Link Road ▪ Investigate the expansion of light industrial land with the Town of Narrogin		▪ Potential to implement a joint Town Planning Scheme with the Town of Narrogin to allow for an additional 3-4 rural lifestyle developments	▪ Investigate the expansion of overnight stay accommodation, including ecotourism ▪ Airport redevelopment project, in partnership with the Town of Narrogin	▪ Investigate development of a waste transfer station, land fill or recycling facility to complement a proposed Regional Waste Depot facility
Pingelly	▪ Support partnerships to make light industrial land available for development ▪ Continue to support 'Future Farms' projects, including advocacy to local producers, educational institutions and community groups	▪ Primary Health Care Demonstration Site development ▪ Investigate 'Cluster Housing' project to complement development of the Primary Health Care Demonstration Site and demand for aged care housing	▪ Continue main street redevelopments, focusing on the retrofit of underutilized and vacant buildings for retail and office occupancy	▪ Investigate expansion of tourism to include a serviced caravan park, native walk trails and indigenous offerings to complement natural assets and culture bases	▪ Advocate for Great Southern Highway realignment
Wagin	▪ Investigate investment opportunities to implement the Intergraded Food and Fibre Hub project ▪ Support the utilisation of rail and CBH/WATCO partnership	▪ Continue to engage with the WA Department of Health regarding health services and future provisions for the community	▪ Aerodrome project development, including provision for residential, commercial and recreational land use ▪ Support the modification of the Shire's Planning Policy to enable renewal of heritage buildings for retail and commercial occupancy ▪ Continue to support the aged friendly initiaitve ▪ Site identification to continue development of aged care units, including attraction initiatives for	▪ Investigate potential tourism projects, notably caravan park redevelopment	

Local Government Area	Agriculture, Livestock & Food Supply Chains	Health & Education	Lifestyle, Amenity and Retirement	Tourism	Other
			'Lifestyle Village' development ▪ Investigate the development of a 'family friendly' park		
Wandering	▪ Promote and facilitate the release of new industrial and commercial land		▪ Bowling green upgrade project	▪ Investigate tourism enhancement projects, including development of short/long term accommodation and marketing of events	▪ Investigate the feasibility of a regional waste facility ▪ Investigate investment toward commercial precinct development (similar design to Williams Woolshed or Hyden Bush Village Shopping Centre)
West Arthur	▪ Completion of Landcorp Light Industrial Feasibility Study ▪ Investigate realignment of Collie-Lake King Highway as part of Main Roads Grain Freight Improvement Program ▪ Monitor and investigate the impacts of Albany Highway and Collie Lake King Highway realignment on small buinesses and heritage buildings	▪ Expansion of the Health and Resource Centre project, a $1.2 million funded project	▪ Continue to support the Well Aged 4WDL Housing initiative and age friendly communities	▪ Investigate tourism enhancement projects, including signage to improve walk trails and caravan park redevelopment	▪ Support for the implementation of the Living Lakes Project
Wickepin	▪ Continue to promote the new sale yard facility for sub regional use, including sale events		▪ Investigation into the expansion of residential zoned land, including lifestyle lots ▪ Investigate the development of an additional 4-6 Well-Aged housing (Independent Living Units)	▪ Implement Wickepin walk trails Master Plan	▪ Support Kaolin mine in exploration opportunities and expansion plans
Williams	▪ Coordinate a marketing strategy to promote the avilability of residential and light industrial land		▪ Support the modification of The Shire of Williams' Planning Policy to enable renewal of heritage buildings for retail and commercial occupancy ▪ Investigate the redevelopment and facility upgrades at the recreation centre	▪ Investigate redevelopment of Lions Park to further capture drive through visitors	▪ Continue to build strong network and working relationships with Boddington Mine companies (Newmont and Worsely Alumina) to ensure support in achieving community focused projects

Appendix A – Local Government Profiles

Shire of Brookton

Context

The Shire of Brookton covers an area of approximately 1,626 square km and has a population of 956 people (5.2% of the Wheatbelt South population). The Shire contains the townsites of Aldersyde, Jelcobine and Kweda. The administrative centre of the Shire is the town of Brookton, which is located approximately 140 kilometres southeast of Perth. Brookton is located on the cross-roads of the Brookton Highway and the Great Southern Highway.

Characteristics

The Shire of Brookton LGA has the following characteristics:

- An estimated residential population of 956 persons in 2011, 8.4% lower than the estimated 1,044 residents in 2001. The WA Planning Commission forecasts this trend to continue over the next decade, declining a further 18% to 786 people in 2021.
- A significant proportion of the population (23.2%) is aged over 65 years, greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). However 19.5% of Brookton's population is aged 14 years or younger, which is not dissimilar to that of the WA average (19.7%). Brookton had a fertility rate of 2.20 children in 2011, above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Brookton ($37,095) are greater than the sub-regional average ($36,231), but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Brookton's primary economic contributor, accounting for some 128,313 ha of land. This accounts for 4% of the total area of agricultural land holdings in the subregion.
- Brookton's economy is underlined by an employment self sufficiency rate of 105% (in 2011). This, coupled with an unemployment rate of 4.3% indicates that Brookton is a place of employment for people residing in neighbouring communities.
- The shire has a District High School in Brookton with 119 primary aged students and 12 high school students.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping remains the dominant agricultural activity within the Shire. Supportive businesses in grain storage and hay processing are also strong with CBH, Balco Hay and SP Hay all operating locally. Each of these businesses could potentially expand to take advantage of land serviced by direct road (Great Southern and Brookton Highways) and rail (Kwinana-Jarrahdale) networks to the metropolitan markets. Interest in boutique practices, notably olive, bee and yabby harvesting continues to grow. This is reflected in the release of small scale hobby farm subdivisions and investigation into water withdraws from the Shire's aquifer system. The redevelopment of the heavy-haulage route to allow heavy vehicles from the North, East and South to deliver to the CBH facility strengthens the concept to develop a light industrial site on the Southern edge of the Shire adjacent to the railway line.

Health and Education

The Shire is competitively positioned to support both local and sub regional ageing residents with high and low care facilities available. High care facilities are rare in the Wheatbelt South and Kalkarni Residence maintains a 'dementia friendly' residence. There is a desire between the Shires of Beverley, Brookton and Pingelly to work collaboratively to address and consolidate age care services. The Year 7 Policy could potentially increase enrolments at the District High School, with an influx of students from smaller communities. Secondary boarding in Perth and Narrogin remains a strong trend, with a daily bus service commuting to Narrogin for day students.

Lifestyle, Amenity and Retirement

The Shire occupies a diverse rural landscape with a variety of rural-residential, hobby farming and boutique industries. The Shire's ongoing planning activity, particularly the subdivision and strategic release of small scale 2-3ha blocks has encouraged this. There is opportunity to expand retailing, business and community services to complement the intensification of land uses.

Tourism

Tourism is a minor contributor to the Shires economy with key attractions including Nine Acre Rock, Boyagin Rock, 'Jack Hansen Ruins', Pioneer Park, Yenyenning Lakes and the heritage museum. Brookton is also situated enroute to internationally renown Wave Rock. The Old Time Motor Show is held bi-annually and attracts approximately 4,500 visitors. There is opportunity to complement these attractions and events with signage elements to direct and create an informative visitor experience. Redevelopment of the caravan park, notably rest areas, waste facilities and convenience retail could further encourage tourists, including international visitors and 'grey nomads' to stay rather than pass through the town.

Actions

A series of actions require implementation for the Shire of Brookton LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Investigate expansion of tourism attractions to include native walk trails and indigenous offerings to reflect natural assets and cultural ties
- Investigate the redevelopment and relocation of the caravan park
- Develop a regional Early Childhood Education and Care Centre coloated with the school
- Continue to support the project endeavors of the UWA Future farm in research and development into broadacre farming systems
- Investigate sewage system upgrades to support intensification of residential development
- Advocate for telecommunications upgrades to improve mobile coverage and address numerous 'black spots' across the Shire
- Expansion of Light Industrial site to develop Intermodel Transport hub.

Shire of Corrigin

Context

The Shire of Corrigin covers an area of approximately 3,095 square km and has a population of 1,088 people (6% of the Wheatbelt South population). The Shire contains the townsites of Bilbarin, Bullaring, Bulyee and Corrigin. The administrative centre of the Shire is the town of Corrigin, which is located approximately 235 kilometres east-southeast of Perth. Corrigin is located along the Brookton Highway.

Characteristics

The Shire of Corrigin LGA has the following characteristics:

- An estimated residential population of 1,008 persons in 2011,16.1% lower than the estimated 1,297 residents in 2001. The WA Planning Commission forecasts this trend to continue, albeit slower over the next decade, increasing a further 9% to 1,188 people in 2021.
- A significant proportion of the population (21.4%) is aged over 65 years, greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). However 18% of Corrigin's population is aged 14 years or younger, which is not dissimilar to that of the WA average (19.7%). Corrigin had a fertility rate of 2.96 children in 2011, above replacement levels (2.1) and close to the sub-regional average (2.99).
- Median personal income levels for Corrigin ($37,088) are greater than the sub-regional average ($36,231), but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Corrigin's primary economic contributor, accounting for some 242,123 ha of land. This accounts for 7% of the total area of agricultural land holdings in the subregion.
- Corrigin's economy is underlined by an employment self sufficiency rate of 90% (in 2011), with an unemployment rate of 4.1%. This is characteristic of an agricultural-based economy where many businesses are home based.
- Corrigin has a District High School in Corrigin with 118 primary aged students and 28 high school students. The Corrigin District High School is an Independent Public School. Corrigin also has a Long Day Care Center (Giggle Pots) licenced to care for up to 19 children per day.
- Corrigin has a hospital, general practice surgery, dental surgery and pharmacy.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Grain production remains the dominant agricultural activity within the Shire. This focus is reflected in the CBH regional office, which is located in the town centre. There is opportunity to refocus the use of the local abattoir for boutique meat processing, as past operations have been constrained with issues in labour force retention. The Shire continues to investigate amendments to their Town Planning Scheme to support the growth and occupancy of light industrial businesses. This includes development of another flour mill to add value to local and sub regional grain production activities.

Health and Education

With under a two hour drive to the regional centres of Merredin and Narrogin, residents will continue to access advanced aged care, health and secondary education when required. The medical centre has been upgraded to include dental, pharmaceutical, general practice and allied health services. The new hydrotherapy pool has added to this list of health amenities and greatly supports community wellbeing, particularly older residents. The Year 7 Policy will potentially increase enrolments at the District High School, with an influx of students from smaller neighbouring communities. Secondary boarding in Perth and Narrogin remains a strong trend.

Lifestyle, Amenity and Retirement

Corrigin occupies sufficient land to increase its residential population. The release of 33 fully serviced blocks as part of Granite Rise Estate permits this, incorporating a variety of block sizes (both rural residential and 'town size'). Ongoing review and amendements to the Town Planning Scheme could further support development of in demand of 'lock and leave' two bedroom -two bathroom homes. Local community facilities are of a high standard and cater to the needs of both young and old residents. The Recreation Centre has experienced significant refurbishment, with the heated hydrotherapy pool upgrade completed in 2012. Retail remains concentrated to the historic main street, including two grocery stores, a hardware store and cafes. A privately owned market garden has established and created a niche for locally grown, seasonally produced fruit, vegetables and preserves. Its presence could be complemented by additional niche businesses such as olive trees for increased oil production.

Tourism

The convenience of access to Brookton Highway positions Corrigin to advance its 'pass through' destination status. The highway is heavily relied upon by visitors travelling to Wave Rock, which welomes over 130,000 visitors per annum. Corrigin has hosted nationally recognised events such as the "Dog in a Ute" competition, leading to the array of dog and ute scupltures throughout the town and Shire. The Walden Park speedway is being redeveloped and is set to reopen in 2014. The track will provide a renewed opportunity to host regional racing events, thus increasing visitors to Corrigin. Plans to extend the caravan park will compliment event attraction whilst boosting overall accommodation options and general ameneity of Corrigin.

Actions

A series of actions require implementation for the Shire of Corrigin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Progress the 'Recreation Grounds and Event Centre' project, involving the development of grounds, clubrooms and a modernised venue for the Corrigin Agricultural Society (scheduled completion June 2015)
- Investigate the rationalisation of zoned land, including amendments to town planning scheme to support establishment of light industrial businesses
- Walden Park speedway redevelopment project
- Caravan park redevelopment project
- Investigate planning mechanisms to diversify housing stock

Shire of Cuballing

Context

The Shire of Cuballing covers an area of approximately 1,250 square km and has a population of 884 people (4.8% of the Wheatbelt South population). The Shire contains the townsites of Cuballing, Popanyinning and Yornaning. The administrative centre of the Shire is the town of Cuballing, which is located approximately 192 kilometres southeast of Perth. Cuballing is located along the Great Southern Highway.

Characteristics

The Shire of Cuballing LGA has the following characteristics:

- An estimated residential population of 884 persons in 2011, 22.4% higher than the estimated 722 residents in 2001. The WA Planning Commission forecasts this trend to slow over the next decade, growing a further 2% to 904 people in 2021.
- A significant proportion of the population (16.1%) is aged over 65 years, greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The proportion of the population aged 14 years or younger (20.5%) is not dissimilar to that of the WA average (19.7%). Cuballing had a fertility rate of 2.55 children in 2011, above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Cuballing ($37,780) are greater than the sub-regional average ($36,231), but significantly below the Perth ($53,864) and WA ($53,227) averages
- Agriculture is Cuballing's primary economic contributor, accounting for some 87,541ha of land. This accounts for just 3% of the total area of agricultural land holdings in the sub-region. A large proportion of the Cuballing shire is comprised of the Dryandra state forest.
- Cuballing's economy is underlined by an employment self sufficiency rate of 51% (in 2011). This coupled with an unemployment rate of 3.4%, indicates that there are more employed residents in the shire than the number of jobs indicating a drive-in/drive-out interconnectedness with surrounding communities such as Narrogin.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Agriculture remains the dominant activity and economic driver within the Shire. Rural support services such as welding, silos and shelter manufacturing/sales are key employment providers for residents. The equine industry has expanded significantly, with the newly completed Dryandra Equestrian Centre leased to Narrogin based equine groups. This development presents endless opportunity for the Shire to attract niche suppliers of equestrian products, in addition to hosting events and activities. This would complement the Shires intestive animal husbandry and support service focus.

Lifestyle, Amenity and Retirement

With an approximate 15km driving distance to the Town of Narrogin, a multipurpose shop (servicing fuel, postal and convenience goods) and Tavern is considered sufficient for resident's general needs. Identity and affiliation with equine activities has prospered with the Dryandra Equestrian Centre development and complementary expansion of cross country grounds. Dryandra Woodlands is a valued natural resource and enhaces the local amenity of the Shire. Collectively, these characteristics will remain attractive to horse owners, young families, singles, retirees and Narrogin based workers, and may further encourage the release of rural residential blocks for development.

Cuballing and Popanyinning's proximity to larger communities (Narrogin and Pingelly respectively) will ensure residents have access to infrastructure and services particularly education and health. A school bus service transports primary and secondary students to Narrogin twice daily and provides an opportunity for further investigation of public transport services. Growth and investment to Narrogin and Pingelly will benefit current and future residents within the Shire of Cuballing significantly.

Actions

A series of actions require implementation for the Shire of Cuballing LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Investigate extension of water pipeline to support rural residential block sales, particularly east of the Great Southern railway line
- Investigate the purchase of land to cater for expansion opportunities of equine activities
- Redevelopment of the equine cross country course
- Continue to form links with entrepreneurial businesses that support the equine industry and the Dryandra Regional Equestrian Centre development
- Investigate the feasibility to establish a caravan park in Cuballing that can also cater for the Equine sector
- Review redevelopment of Town Planning Scheme, particular focus on introducing zoning for accommodating animals (i.e. horses) on rural residential blocks

Shire of Dumbleyung

Context

The Shire of Dumbleyung covers an area of approximately 2,553 square km and has a population of 622 people (3.4% of the Wheatbelt South population). The Shire contains the communities of Dumbleyung, Kukerin, Moulyinning, Nippering and Tarin Rock. The administrative centre of the Shire is the town of Dumbleyung, which is located approximately 267 km south east of Perth. Dumbleyung is located along the Collie-Lake King Highway, the major freight route to Esperence.

Characteristics

The Shire of Dumbleyung LGA has the following characteristics:

- An estimated residential population of 622 persons in 2011, 17.1% lower than the estimated 750 residents in 2001. The WA Planning Commission forecasts this trend to continue over the next decade, declining a further 21% to 492 people in 2021.
- A significant proportion of the population (16.9%) is aged over 65 years, greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The proportion of the population aged 14 years or younger in Dumbleyung is 20.3%, which is not dissimilar to that of the WA average (19.7%). Dumbleyung had a fertility rate of 3.65 children in 2011, well above replacement levels (2.1) and above the sub-regional average (2.99).
- Median personal income levels for Dumbleyung ($32,347) are below the sub-regional average ($36,231), and significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Dumbleyung's primary economic contributor, accounting for some 237,108 ha of land. This accounts for 7% of the total area of agricultural land holdings in the sub-region.
- Dumbleyung's economy is underlined by an employment self sufficiency rate of 86% (in 2011). This coupled with an unemployment rate of 4.3%, indicates that there is a high number of home businesses in the shire, however there is still a drive-in/drive-out interconnectedness with surrounding communities, such as Lake Grace, Narrogin and Katanning.
- The Shire of Dumbleyung has two Primary Schools: Dumbleyung Primary with 29 students and Kukerin Primary with 47 students.
- Dumbleyung also has a Hospital and health centre at Kukerin

<u>Economic opportunities</u>

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Grain and livestock production remain the dominant agricultural activity and economic driver within the Shire. There is opportunity to expand boutique aquaculture, grain and poultry industries with Cambinatta Yabbies (producer of crustaceans), Emu Essence (Kukerin producer of oils and skincare products) Eden Valley (Biodynamic farming) and Australian Superfoods Group (quinoa crop trials) demonstrating local entrepreneurship, and industry value add with strong connections to national and international markets where products are exported to. Dumbleyung falls within Bunge Australia's grain catchment area providing an alternate export market for grain growers. Investment to increase on-farm storage is foreseen.

Lifestyle, Amenity and Retirement

Dumbleyung is considered an attractive and affordable community, home to 'tree changers', relocating retirees and families. Reasonable proximity to the regional centres of Katanning and Narrogin does not restrict a drive in drive out lifestyle. The subdivision of land, notably around local lakes and nature reserves continues to attract property developers and investors, resulting in a diverse residential landscape. Convenience based goods and services will remain the dominant retail market trade to supply Kukerin and Dumbleyung residents.

Tourism

Lake Dumbleyung remains a key attraction for the Shire. Spread across 5,200 hectares, the lake is recognised as the largest inland water body in the South West. The landscape is recreationally used for various activities including water skiing, canoeing, sailing and walk trails. The history of Donald Campbell and his Bluebird' boat (used to break the world water speed record in 1964) is renowned, and there is opportunity to landmark his achievement through interpretive tourism projects, with a replica vessel currently under construction. This development may further interlink with annual calendar events such as the Cambinatta Yabbie Extravaganza, Bluebird festival and Kukerin Creek Bed Races, each of which attract visitors beyond grey nomads. Visitor accommodations will be boosted with Cambinatta Yabbie farm developing chalets and spaces to host private events, particularly weddings and corporate functions.

Actions

A series of actions require implementation for the Shire of Dumbleyung LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and Government.

- Investigate tourism enhancement projects, including the Bluebird Interpretative Centre to complement the vessel replica development
- Reinvigorate and diversify tourism accommodation, focusing on 'high end' options
- Continue to support the 4WDL aged care housing initiative, with the construction of two independent living units from 2014 to 2015

Shire of Kondinin

Context

The Shire of Kondinin covers an area of approximately 7,376 square km and has a population of 1,067 people (5.8% of the Wheatbelt South population). The Shire incorporates the communities of Hyden, Karlgarin and Kondinin. The administrative centre of the Shire is the town of Kondinin, which is located approximately 280 kilometres at the junction of the Williams-Kondinin Road and Brookton Highway. The Shire belongs to the Roe ROC Group, which shares a Waste Management Scheme with neighbouring Shires of Corrigin, Kulin and Narambeen.

Characteristics

The Shire of Kondinin LGA has the following characteristics:

- An estimated residential population of 1,067 persons in 2011, 3.7% higher than the estimated 1,029 residents in 2001. The WA Planning Commission forecasts this trend to reverse over the next decade, declining 12% to 937 people in 2021.
- A smaller proportion of the population (11.1%) is aged over 65 years, less than the Perth Metropolitan Region (12.5%) and WA average (12.3%). However 18.4% of Kondinin's population is aged 14 years or younger, which is not dissimilar to that of the WA average (19.7%). Kondinin had a fertility rate of 2.27 children in 2011, above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Kondinin ($32,370) are less than the sub-regional average ($36,231) and significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Kondinin's primary economic contributor, accounting for some 413,600 ha of land. This accounts for 12% of the total area of agricultural land holdings in the subregion.
- Kondinin's economy is underlined by an employment self sufficiency rate of 129% (in 2011). This, coupled with a low unemployment rate of 3.9% indicates that Kondinin is an employment hub for people residing within and external to the shire. It is also characteristic of an economy dominated by agriculture, where the majority of businesses are home based.
- The Shire of Kondinin has two primary schools; Hyden Primary with 87 students and Kondinin Primary with 36 students.
- Hyden is approximately 60km (40 minutes) east of Kondinin, located along the Brookton Highway. Wave Rock attracts approximately 140,000 visitors to Hyden annually.

<u>Economic opportunities</u>

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Grain production remains the strongest agricultural activity within the Shire. The convenient access to Brookton Highway supports freight transportation to the Kwinana and Fremantle ports, while the rail network at Hyden transports grain to Albany port. Technological advancements and no till seeding practices have lessened the reliance on livestock production for weed management. To diversify grain production, there is opportunity to expand industrial activity, making use of the power substation based at Kondinin. Potential businesses may complement both agricultural and mining operations. To realise this, investigation will be required into land tenure and assembly. Landcorp has undertaken significant industrial development in Hyden, which may encourage further investment.

Lifestyle, Amenity and Retirement

The extensive list of community facilities, including bowls clubs, tennis clubs, town halls, community resource centres, sports ovals and pool redevelopment at Kondinin provides an attractive opportunity for residential developers as lower financial and infrastructural inputs are required to meet lifestyle amenity needs. This coupled with the Kondinin hospital with an established 24 hour emergency and minor surgical service and aged care accommodation (Yeerakine Lodge, with Whispering Lodge and West Court Homes) enhances the Shire's appeal to accommodate all sectors of the community, particularly retirees. The Kondinin hospital catchment extends to include the Kulin and Hyden communities. West Court Homes in Kondinin is undergoing expansion with the construction of six independent living units. Opportunity exits for an additional six units to be developed in the future. Hyden has a small nursing post supported by Silver Chain, Emergency patients can be airlifted to Perth through the Royal Flying Doctor Service. The Wave Rock Airport Terminal at Hyden includes a patient transfer station accommodating up to five ambulances, patient stability area and pilot waiting area. There is a small primary school in both Kondinin and Hyden, with the majority of secondary schooling accessed via Perth.

Tourism

The list of attractions and events reflects the Shires natural, historic and cultural character. Popular destinations and events include the wildlife zoo, lace museum, Karlgarin Gilgie Races, Wave Rock weekender music festival and numerous country market days. Wave Rock remains the key attraction for the Shire, with visitor numbers (including a large portion of internationals) exceeding 140,000 annually. There is opportunity to upgrade tourism amenities, particularly information bays, signage, parking expansion, pavilion, toilets and barbeque picnic areas. Sealing the Hyden-Norseman road will further support traffic en route to Wave Rock. The Great Western Woodlands continues to grow as a natural attraction, particularly during the wildflower season. Roe Tourism Group is currently promoting the area through their "Pathways to Wave Rock" project. This includes video and audio self drive tours targeting the Asian market.

Mining

Although mining has not been identified as a key economic contributor to the Wheatbelt South sub-region, Kondinin has an evident strength in this area with the presence of the Western Areas LTD operated Forrestania Nickel Mine which is located in the far east of the Shire. The mine has a large fly in fly out camp, accommodating up to 450 workers. This establishment will remain feasible in producing high grade nickel for the next two decades. There is ongoing investigation and interest to develop a new deposit site within the area, which may open up opportunities for additional investment to support the mining sector. Mining has proven economic benefits for the Shire of Kondinin as the number of people employed in the industry and the establishment of mining support services has the opportunity to increase.

Actions

A series of actions require implementation for the Shire of Kondinin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Completion and maintenance of the Kondinin Pool redevelopment
- Redevelopment of Kondinin caravan park, including upgrades to chalets and amenities
- Hyden Pavilion complex redevelopment
- Sealing of Hyden-Norseman road to support tourism traffic
- Realignment of Karlgarin Hills Road and Brookton Highway (near the Kondinin Golf Course)

- Develop marketing campaign for the Light Industrial and residential blocks at Hyden
- Further investment into Independent Living Units at Kondinin and Hyden
- Continue to support The Hyden Tourism Development Company in opportunities to enhance the Wave Rock ‘experience’
- Investigation into the increase of housing diversity to capture ‘young singles’ market
- Investigation into the development of Great Western Woodlands tourism interpretive centre
- Continue to support Landcorp in subdivision opportunities

Shire of Kulin

Context

The Shire of Kulin covers an area of approximately 4,700 square km and has a population of 854 people (4.7% of the Wheatbelt South population). The Shire contains the localities of Dudinin, Holt Rock, Jitarning, Kulin and Pingaring. The administrative centre of the Shire is the town of Kulin, which is located approximately 280kms south east of Perth. Kulin is located along the Williams-Kondinin road.

Characteristics

The Shire of Kulin LGA has the following characteristics:

- An estimated residential population of 854 persons in 2011, 4.7% lower than the estimated 906 residents in 2001. The WA Planning Commission forecasts this trend to continue over the next decade, declining a further 9% to 774 people in 2021.
- A significant proportion of the population (24.5%) is aged 14 years or younger which is greater than that of the WA average (19.7%). However the over 65 years aged demographic (12.8%) is similar to the Perth Metropolitan Region (12.5%) and WA average (12.3%). Kulin had a fertility rate of 3.24 children in 2011, well above replacement levels (2.1) and above the sub-regional average (2.99).
- Median personal income levels for Kulin ($32,339) are less than the sub-regional average ($36,231) and significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Kulin’s primary economic contributor, accounting for some 386,209 ha of land. This accounts for 11% of the total area of agricultural land holdings in the subregion.
- Kulin’s economy is underlined by an employment self sufficiency rate of 85% (in 2011). This, coupled with a very low unemployment rate of 2.8% indicates that while the majority of employment in based within the shire, there is a small proportion travelling to neighbouring communities for employment.
- The Shire of Kulin has a District High School in Kulin with 88 primary students and 16 secondary students. The District High School is an Independent Public School.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production remain dominant agricultural activities within the Shire. With a confined industrial base, there is opportunity to expand machinery dealerships and farming support services. Two machinery dealerships currently operate, with the most recent commencing business in 2013. A three year grazing trial was initiated in 2012 by the Facey Group, with endeavors to refine, manage and improve productivity of dual purpose crops. Their local presence continues to benefit the farming community, sharing specific details to sustainable crop grazing techniques.

Health and Education

The Shire maintains a small medical centre with essential services and a general practitioner visiting twice weekly. Health nurses provide additional outpatient and HACC package evaluation, making recommendations to the Kondinin Kulin Aged Care Inc, which provides four low care beds at Yerrakine Lodge. The Shire continues to plan for additional health infrastructure, particularly for aging residents.

Camp Kulin, founded by the Global Good Foundation is a new initiative for the Shire, with the first program held in 2012. The organisation instills education, social and leadership skills to marginalized and abused children, including ethnic groups. Volunteer run, activities operate over a 4-5 day period with high levels of engagement between community facilities, in particular the aquatic (water park) and indoor recreation centre. There is opportunity to extend the camp's schedule to involve local children 8-15 years of age via hosting holiday camps and corporate structures through relationship development days. The Year 7 Policy will potentially increase enrolments at the District High School, with an influx of students from smaller neighbouring communities. Secondary boarding in Perth and Narrogin remains a strong trend.

Lifestyle, Amenity and Retirement

Completion of the main street revitalisation project has increased the vibrancy of the town centre. Projects have involved the retrofit and refurbishment of heritage buildings in addition to aesthetic enhancements such as landscaping. The Old Railway Station Art Gallery provides an example of this, with development fostered through the Central East Tourism Project. Implementing plans for a heavy vehicle bypass will further enhance this redevelopment phase, creating a pedestrian friendly precinct and potential for alfresco dininig. The release of rural lands for residential development will continue to prosper under a working relationship with private developers, such as T and R Homes (house and land packages). Additional land has been designated behind the primary school for residential development and will be released gradually through a guided 10 year development plan.

Tourism

Tourism activity remains dependent on highway traffic, with stop over attractions requiring development. Secondary tourists, such as business travelers, coach tour groups and event goers will remain seasonal and concentrated in holiday periods or events such as the Kulin Bush Races and Returned Vets weekends. The site of the Kulin Bush Races could attract more events requiring space and capacity for noise (ie. Blazinging Swan event). There is opportunity to enhance existing attractions and redevelop spaces along the Tin Horse Highway Tourist Drive and Johnson Street. This may involve space creation for performances and events, to redirect awareness to the town centre. Camp Kulin will continue to grow as a regional attraction for leadership and youth activities, attracting visitors for overnight stays, corporate functions and event hosting.

Actions

A series of actions require implementation for the Shire of Kulin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and Government.

- Encourage the formation of a local business network to support Camp Kulin
- Ongoing redevelopment of the Town Centre, focusing on aesthetic improvements, including signage, landscaping and highlighting the heritage form
- Shire office relocation project, including development of new visitor centre
- Develop marketing campaign for rural-residential development
- Support Special Projects Officer role to manage events and regional initiatives (ie. Pathways to Wave Rock)

Shire of Lake Grace

Context

The Shire of Lake Grace covers an area of approximately 10,379 square km and has a population of 1,404 people (7.7% of the Wheatbelt South population). The workforce of the Shire is highly seasonal, with the presence of 457 Visa holders distorting the population profile. The Shire contains the communities of Lake Grace, Lake King, Newdegate, Pingaring and Varley. The administrative centre of the Shire is the town of Lake Grace, which is located 347 kilometres south east of Perth. Lake Grace is located along the Collie-Lake King Highway.

Characteristics

The Lake Grace LGA has the following characteristics:

- An estimated residential population of 1,404 persons in 2011, 12.7% lower than the estimated 1,609 residents in 2001. The WA Planning Commission forecasts this trend to continue, declining a further 14% to 1,204 people in 2021.
- A significant proportion of the population (21.7%) is aged 14 years or younger which is greater than that of the WA average (19.7%). However the over 65 years aged demographic (10.8%) is smaller than the Perth Metropolitan Region (12.5%) and WA average (12.3%). Lake Grace had a fertility rate of 2.67 children in 2011, above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Lake Grace ($32,373) are less than the sub-regional average ($36,231) and significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agriculture is Lake Grace's primary economic contributor, accounting for some 800,613 ha of land. This accounts for 23% of the total area of agricultural land holdings in the subregion.
- Lake Grace's economy is underlined by an employment self sufficiency rate of 95% (in 2011). This, coupled with a very low unemployment rate of 1.3% indicates that typical of an agricultural community, the majority of employment is home-based agricultural businesses.
- The shire of Lake Grace has a District High School in Lake Grace with 95 primary students and 19 secondary student. Lake Grace District High School is an Independent Public School. There are two additional primary schools in the Shire of Lake Grace: Lake King Primary with 41 students and Newdegate Primary with 55 students.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and grain processing remain the dominant agricultural activities within the Shire. WA Grains Group demonstrates a strong business presence and continues to facilitate international market expansion, particularly with Asia. This activity and interest may further support development of a processing plant, of which will add value to raw products. The local presence of WA Grains Groupmay encourage the development of a flour mill at an underused CBH storage site. Investment from Chinese Company Heilingjing Feng Agricultural (HFA) into grain production (within the Shire of Lake Grace) and long term lease at Albany Port and Bunge Australia into grain marketing and logistics at Bunbury will support the need for road and rail networks upgrades, particularly Chester Pass Road and Collie-Lake King Highway to ensure additional product can be efficiently transported to metropolitan ports (Perth, Bunbury and Albany). Mineral resources and viticulture may impact on the local economy with ongoing investments into gold deposits and diversification of local vineyards (Walkers Hill).

Health and Education

The Lake Grace Hospital maintains a basic level of services and care with recent upgrades including a permanent doctor, pharmacist and 5 permanent, 5 acute beds. Additional services are accessed via the Newdegate Medical Centre. The Shire's involvement with the Wheatbelt Integrated Aged Solutions and Care Project and 4WDL Well Aged Housing Project will continue to reveal investments in independent living units for ageing residents. The Year 7 Policy will potentially increase enrolments at the District High School, with an influx of students from smaller neighbouring communities. Secondary boarding in Perth and Narrogin remains a strong trend, though future secondary boarding trends are predicted to strengthen toward Albany as a more affordable option compared to Perth.

Lifestyle, Amenity and Retirement

The Shire of Lake Grace residents enjoy a wide variety of facilities and services that make the Shire an attractive place to live. Servicing a number of communities, the town of Lake Grace has an IGA store open 7 days a week, cafe, Artspace, Visitors Centre, Men's shed, service station, various sporting facilities, banking services and community resource centre. The Shire has also invested in a number of Well Aged Housing units across the communities of Lake Grace and Newdegate, enhancing options for current and future residents to remain living within the Shire. The Shire of Lake Grace and community have invested significantly into visitor servicing (upgrade to visitors centres and opening of cafe) has complemented Lake Grace and Newdegate's amenity and lifestyle options. Events such as the Newdegate Field Day, development of attractions along the Holland's Track, Great Western Woodlands and Lake King Tractor Museum will continue to showcase lifestyle opportunities across the Shire and enhance visitor experiences in the long term.

Actions

A series of actions require implementation for the Shire of Lake Grace LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and Government.

- Investigate development of additional grain processing and storage facility
- Investigate upgrade potential of Collie-Lake King Highway
- Continue to support the project endeavors of 4WDL Well Aged Housing Project
- Encourage mineral resource exploration through Magma Metals and Magnetic Resources Pty Ltd
- Investagate upgrades to telecommunication infrastructure to adress 'blackspots'
- Monitor Lake Grace Hospital capital upgrades
- Implement Master Plan of Shire of Lake Grace Walk Trails
- Increase marketing and promotion of tourism opportunities across the Lake Grace Shire
- Implement a signage plan to support tourism ventures

Town of Narrogin

Context

The Town of Narrogin covers an area of approximately 13.1square km and has a population of 4,357 people (23.9% of the Wheatbelt South population). The Town is located 190 kilometres south east of Perth and is the regional centre for the Wheatbelt South Sub-region. Narrogin is located at the cross roads of the Williams-Kondinin Road and Great Southern Highway.

Characteristics

The Narrogin Town LGA has the following characteristics:

- An estimated residential population of 4,357 persons in 2011, 8.3% lower than the estimated 4,750 residents in 2001. The WA Planning Commission forecasts this trend to reverse over the next decade, increasing a further 11% to 4,857 people in 2021.
- A significant proportion of the population (23.3%) is aged 14 years or younger, greater than that of the WA average (19.7%). The proportion of persons over 65 years (15.4%) is also greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Narrogin Town has a fertility rate of 2.52 children (in 2011), above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Narrogin Town ($41,950) are above the sub-regional average ($36,231) and the highest in the Wheatbelt South Sub-region. However, they are significantly below the Perth ($53,864) and WA ($53,227) averages.
- The Town of Narrogin's economy is underlined by an employment self sufficiency rate of 113% (in 2011) as well as a high unemployment rate of 6.8%. Narrogin is a recognised Sub-regional centre and has a significantly high proportion of state owned housing accommodating a high ratio of low socio-economic demographic, who may not have the skills necessary to find employment. As a regional centre, Narrogin provides attractive opportunities for professionals which accounts for the wide catchment commuting from surrounding communities.
- The Town of Narrogin has two public primary schools (with 276 and 339 students respectively), a private Catholic Primary School with 190 students and a Senior High School with 614 students (73 year 12's). The East Narrogin Primary School and the Narrogin Primary School are Independent Public Schools. The town also has a CY O'Connor TAFE campus. There is Long Day Care licensed for up to 47 placements.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Narrogin is home to numerous small to medium sized businesses that service the agriculture, livestock and food supply chain sectors. Machinery dealerships, transport and logistics, agricultural banking services, agricultural consultants, vetinary services, agronomy and merchandice agencies all provide support to a wide client base beyond the Wheatbelt South sub-region. Enhanced telecommunication services will also improve services to the sub-region. As broadacre agricultural practices continue to modernise and rationalise and with an increase in smaller land holdings to the north and west of Narrogin, agricultural, livestock and food supply chain services will continue to be sought after. Expansion of the light industrial area and completion of the Narrogin Link Road and Wanerie Road will provide opportunities for further business development.

Health and Education

The Town will continue to experience a growth and demand for health and educational services, with catchment extending to include Narrogin Shire and surrounding local governments within the the sub-region. The Narrogin Hospital is heavily relied upon throughout the sub region, providing essential emergency and prenatal services and some surgical procedures. The facility requires ongoing upgrades to ensure operations are up to a high standard. Aged care remains a growing industry with numerous planning and development opportunities identified to meet demand. This includes the old drive-in cinema site, which has been re zoned to accommodate 80 independent aged friendly living units. Two residential aged care providers currently operate in the Town, Karinya (a 35 bed ageing-in-place facility) and Narrogin Nursing Home (a 50 bed higher care facility).

There are three primary schools in the town, including one private primary school, a senior high school, CY O'Connor TAFE and Rural Clinical School. Educational facilities will continue to expand to meet demand for all education tiers (primary, secondary and tertiary). Narrogin Senior High School's newly developed performing arts/music and administration centre and designated trade course (which runs in conjunction with CY O'Connor) is a welcomed addition, boosting educational resources and skill sets.

Lifestyle, Amenity and Retirement

The Town is the principal retail centre for the sub-region, attracting people seeking access to premier facilities, services and employment opportunities. Commercial and retail services extend to financial and legal institutions, food outlets, homewares, Target Country, trade and hardware stores. Small to medium sized niche businesses such as cafes, restaurants and boutiques will continue to play a significant role in enhancing the character and vibrancy of the town centre. The affordability of housing coupled with planned upgrades to telecommunications and travel proximity to Albany, Bunbury and Perth may further support this intensification.

Tourism

The Dryandra Visitors Center is centrally located in the Town, with operational services representing and marketing sub regional events, attractions and services. There is an identified need to expand visitor accommodation beyond the current motel and hotel. Both venues are relied upon by workers, with capacity issues often experienced. Investments into Bed and breakfasts or boutique hotels may accommodate the visitor influx corresponding to annual sub regional events (ie. Dryandra Art,Food and Wine Trail and Spring Festival).

Actions

A series of actions require implementation for the Town of Narrogin to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Continue with plans to develop Independed Livinig Units at the old drive in cinema site to support aged care
- Advocate for telecommunications upgrades to improve mobile coverage and enable residents and business owners to flexibly telework and access markets nationally and internationally
- Investigate CBD revitalisation projects such as façade upgrades, building rationalisation, landscaping and development of pedestrian friendly spaces
- Investigate the formation of an education precinct, including primary schools, senior high school and links with CY O'Connor TAFE

- Investigate the refurbishment and re use of the Narrogin Railway Station
- Investigate the extension of the caravan park to accommodate additional RV vehicles and chalet type accommodation
- Advocate to complete Narrogin Link Road
- Investigate development of dementia friendly facilities at Karinya
- Monitor capital upgrades to Narrogin Regional Hospital
- Investigate the expansion and development of industrial and residential land
- Support upgrates to the residential college
- Support the Narrogin airport redevelopment

Shire of Narrogin

Context

The Shire of Narrogin covers an area of approximately 1,618.8 km square and has a population of 897 people (4.9% of the Wheatbelt South population). The Shire contains the localities of Boundain, Dumberning, Highbury, Hillside, Minigin, Narrogin Valley, Nomans Lake and Yilliminning. The Shire of Narrogin's administrative boundary surrounds the Town of Narrogin and it is the last donut council in Western Australia. The administration for the shire takes place within the town of Narrogin which is located 190 kilometres south east of Perth.

Characteristics

The Narrogin Shire LGA has the following characteristics:

- An estimated residential population of 897 persons in 2011, 16.5% higher than the estimated 770 residents in 2001. The WA Planning Commission forecasts this trend to increase over the next decade, increasing a further 22% to 1,097 people in 2021.
- The proportion of the population aged 14 years or younger (19.5%) is similar to that of the WA average (19.7%). The proportion of persons over 65 years (10.5%) is less than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Narrogin Shire has a fertility rate of 2.18 children (in 2011), above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Shire of Narrogin ($40,236) are above the sub-regional average ($36,231) but below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of Narrogin's primary economic contributor, accounting for some 141,043 ha of land. This accounts for 4% of the total area of agricultural land holdings in the subregion.
- The Shire of Narrogin's economy is underlined by an employment self sufficiency rate of 58% (in 2011). This, coupled with a very low unemployment rate of 2% demonstrates a drive in drive out connectivity with neighbouring communities, particularly the Town of Narrogin.
- The Shire of Narrogin has an Agricultural college with 121 students
- There has been discussion between the shire and Town of Narrogin to work towards amalgamations which may mean better use of resources.
- Sport and Recreational facilties include the Narrogin Golf Course and airstrip for Gliding and Flying Club.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production remain dominant agricultural activities within the Shire. Cattle feed lots, hay processing and meat processing (abbatoir) are also key activities. Crop outputs are transported directly to bulk storage within the sub-region then to market/ports via established road and/or rail network. There is opportunity to investigate bauxite mining and agricultural processing sites by undertaking a land feasibility study. Additional light industrial land is likely to become available through the development of Wanerie road, and may attract investment from transport and logistics cpmpanies. The Agricultural College is located in the Shire and maintains a strong focus on traditional farming, trade practices and equine management.

Lifestyle, Amenity and Retirement

Lifestyle attraction is enhanced with established transport links to the metropolitan region, coupled with affordable housing and business premises. There is opportunity to intensify boutique industry, notably horticulture and equestrian. This attraction corresponds to the availability of rural residential lots, proximity to the Town of Narrogin and establishment of community facilities (including the neighbouring Dryandra Equestrian Centre).

Increased membership and frequency of aircraft movements at the Narrogin Gliding Club and Narrogin Flying Club has prompted an expansion proposal of the aerodrome complex. This development may support the releaseof rural residential lifestyle blocks in the town of Highbury, which is located 16km south of Narrogin. Highbury is recognised for its community Federation Sundial and Pioneer walk trail.

Tourism

Increasing memberships at Narrogin Gliding Club and Narrogin Flying Club reflects a growing popularity and interest in aviation. Complementary redevelopment of the aerodrome complex may open up opportunities for tourism, including scenic tours and recreational gliding operations. The establishment of farm stays and ecotourism may also complement the industry, dually addressing accommodation shortages in the Town of Narrogin.

Actions

A series of actions require implementation for the Shire of Narrogin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Investigation into the the feasibility of Yilliminning Agri-Precinct with DAFWA
- Investigate the expansion of overnight stay accommodation, including ecotourism
- Airport redevelopment project, in partnership with the Town of Narrogin
- Support the completion of Wanerie Road and the Narrogin Link Road
- Investigate development of a waste transfer station, land fill or recycling facility to complement a proposed Regional Waste Depot facility
- Investigate the expansion of light industrial land with the Town of Narrogin
- Potential to implement a joint Town Planning Scheme with the Town of Narrogin to allow for an additional 3-4 rural lifestyle developments

Shire of Pingelly

Context

The Shire of Pingelly covers an area of approximately 1,295 km square and has a population of 1,192 people (4.9% of the Wheatbelt South population). The Shire contains the localities of Dattening, Moorumbine and Pingelly. The administration for the shire takes place within the town of Pingelly, which is located 160 kilometres southeast of Perth. Pingelly is located along the Great Southern Highway.

Characteristics

The Pingelly LGA has the following characteristics:

- An estimated residential population of 1,192 persons in 2011, 1.6% lower than the estimated 1,211 residents in 2001. The WA Planning Commission forecasts the population to remain stable over the next decade to 2021.
- A significant proportion of the population is aged over 65 years (20%), significantly greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The proportion of the population aged 14 years or younger (21.6%) is also greater than that of the WA average (19.7%). The Pingelly Shire has a fertility rate of 3.37 children (in 2011), well above replacement levels (2.1) and above the sub-regional average (2.99).
- Median personal income levels for Shire of Pingelly ($37,112) are above the sub-regional average ($36,231) but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of Pingelly's primary economic contributor, accounting for some 121,942 ha of land. This accounts for 4% of the total area of agricultural land holdings in the subregion.
- The Shire of Pingelly's economy is underlined by an employment self sufficiency rate of 76% (in 2011). This, coupled with an unemployment rate of 7.5% demonstrates there is a high drive in drive out connectivity with neighbouring communities such as Narrogin and Brookton. The greater than average unemployment rate can be correlated with the higher proportion of indigenous persons in the shire that are less likely to have the opportunity to travel for employment.
- The shire has a primary school in Pingelly with 161 students. A school bus travels to Narrogin Senior High School enabling a day student option for secondary students.
- Ridgeway Farm is owned by the University of WA (UWA Future Farm).

Economic opportunities

The following economic opportunities have been identified.

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production remain the dominant agricultural activities in the Shire. With no land currently available for light industrial activity, the Shire is currently investigating development opportunities with Landcorp. Addressing this shortage may welcome expansion of trade based businesses, such as auto servicing and electrical (including those which are home based). The University of Western Australia Future Farms is an innovative operation in the Shire, encouraging the retention and adaptation of agriculture to uncertain environmental and economic climates. Key projects extend to conservation cropping, alternative energy generation and ethical animal production. The farms operation continues to bridge gaps and build relationships between government and community to build a 'global network' of research farms.

Health and Education

The Shire is a designated location for the development of a Primary Health Care Demonstration Site. This SIHI and WACHS initiative supports home care service delivery and training to reduce premature hospitalisation and community instability. This development has the potential to attract extensive investment across the aged care sector, including complementary aged friendly housing construction. The UWA Future Farm has provided further opportunities to work with the Pingelly community and strengthen UWA's relationship and commitment to Pingelly by exploring tertiary study options through the CRC network.

Lifestyle, Amenity and Retirement

Ongoing revitalisation of the retail core (landscaping, artistic enhancements and reuse of heritage buildings) continues to attract new businesses, trade and tourist stop over's. Several residential subdivisions are in planning process, including a group housing configuration on Stone Street. This development has been uniquely designed to attract the younger, mobile workforce (including fly in fly out residents). Six independent living units are currently in the process of development and will dually relieve the aged care waiting list at Somerset House. There is opportunity to further invest in the health and aged care workforce to reflect development progression of the Primary Health Care Demonstration Site.

Realignment of the Great Southern Highway to redirect heavy traffic from thr CBD/main street to parrallel with the railway line would enable revitalisation of the CBD (pedestrian friendly, enhance walkways, parks and gardens connects and shop front refurbishment).

Tourism

The Shires relationship with the Dryandra Country Visitors Center remains fundamental to marketing tourism attractions. This extends to Boyagin Rock and Tutanning Reserve, which are spiritually significant to the local Aboriginal population. There is opportunity to capitalise on emerging 'grey nomads' and caravanning trends through the provision of complementary amenities such as a serviced caravan park and native walk trails. An established Tourism Group to focus on the development of local products and support to enhance and invest in accommodation/service sector will help to revitalise the local economy and community amenity. Local product development may also provide an opportunity to engage and employ the local Aboriginal population.

Actions

A series of actions require implementation for the Shire of Pingelly LGA to effectively leverage the economic opportunities identified above, and to be strategically positioned to capture support from community, investors and government.

- Support partnerships to make light industrial land available for development
- Primary Health Care Demonstration Site development
- Investigate 'Cluster Housing' project to complement development of the Primary Health Care Demonstration Site and demand for aged care housing
- Investigate expansion of tourism to include a serviced caravan park, native walk trails and indigenous offerings to complement natural assets and culture bases
- Continue to support 'Future Farms' projects, including advocacy to local producers, educational institutions and community groups
- Continue main street redevelopments, focusing on the retrofit of underutilized and vacant buildings for retail and office occupancy

- Advocate for Great Southern Highway realignment

Shire of Wagin

Context

The Shire of Wagin covers an area of approximately 1,948 km square and has a population of 1,884 people (10.3% of the Wheatbelt South population). The Shire contains the localities of Piesseville and Wagin. The administration for the shire takes place within the town of Wagin, which is located approximately 230 kilometres southeast of Perth. Wagin is located on the cross-roads of the Collie-Lake King and Great Southern Highways and main freight route to Esperance.

Characteristics

The Wagin LGA has the following characteristics:

- An estimated residential population of 1,884 persons in 2011, 0.7% higher than the estimated 1,871 residents in 2001. The WA Planning Commission forecasts the population trend to reverse over the next decade, declining 5% to 1,784 by 2021.
- The proportion of the population aged 14 years or younger (20.7%) is greater than that of the WA average (19.7%). However the proportion of persons aged over 65 years (19.7%) is significantly greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Shire of Wagin has a fertility rate of 2.95 children (in 2011), above replacement levels (2.1) but below the sub-regional average (2.99).
- Median personal income levels for Shire of Wagin ($37,790) are above the sub-regional average ($36,231) but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of Wagin's primary economic contributor, accounting for some 186,519 ha of land. This accounts for 5% of the total area of agricultural land holdings in the subregion.
- The Shire of Wagin's economy is underlined by an employment self sufficiency rate of 77% (in 2011). This, coupled with an unemployment rate of 4.8% demonstrates there is a high drive in drive out connectivity with neighbouring communities such as Narrogin and Katanning despite this being a larger than average Wheatbelt south town. The greater than average unemployment rate can be correlated with the higher proportion of indigenous persons in the shire that are less likely to have the opportunity to travel for employment.
- The Shire of Wagin has a District High School with 241 primary students and 41 secondary students.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production will remain foundation industries within the Shire, with complementary agribusinesses supporting producers. The processing of grain for animal and human consumption adds significant economic value, with produce exported internationally. Morton Seeds and Grain is a key employer in this sector and has partnered with the Shire of Wagin to investigate development of an 'Integrated Food and Fibre Hub'. This proposal may incorporate bio-energy production and desalination technologies to address rising saline water tables and provide for commercial hydrophonics operations. A heavy vehivle haulage link road will need to be investigated with increased traffic movement of grain and general freight through the CBD, better access to light industrial land, established industry (ie. CBH Grain receival site, Morton Seeds) and airport.

Health and Education

With reasonable proximity to Narrogin town, residents are able to access specialised health services not provided by the Wagin hospital. Waratah Lodge and Cottage Homes provides for a variety of aged accommodation needs from residential aged care (18 beds) to independent living units (36 units). There is opportunity to expand the development of independent living units which have been well received by the community. Health care services can also expand to include respite, mental and dementia specific. The redevelopment of the aerodrome precinct will further improve access for the Royal Flying Doctor. The Wagin CRC supports numerous services, including wireless internet, meeting room facilities and education and training courses.

Lifestyle, Amenity and Retirement

The Shire is marketed as an affordable lifestyle, with spacious lot sizes supported by quality recreation, education and healthcare facilities. These characteristics have become increasingly attractive to residents relocating or seeking relief from housing prices in metropolitan centres. The reasonable proximity to Albany, Bunbury, Katanning and Narrogin, may support a drive in drive out workforce. Several sites have been identified for mixed use residential and commercial development within the Shire, including the underutilized air field and aerodrome precinct. Investigation of heavy vehicle traffic flow will need to be considered particularly on pressures through the CBD and ability to revitalise town centre and impact of traffic vibrations on heritage buildings.

Tourism

The Wagin Woolorama is Western Australia’s largest regional agricultural show attracting approximately 20,000 visitors per year to Wagin (and the sub-region). Celebrating the history of agriculture production and in particular the wool industry, iconic displays such as the Wagin Historical Village and the 9m sheep sculpture “Bart the Ram” provide visitors an insight into a Western Australian farming community. With a number of cafes, pubs and accommodation options (motel, caravan park), exhibition space and walk trails, Wagin is well positioned to further develop their tourism sector.

Actions

A series of actions require implementation for the Shire of Wagin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Aerodrome project development, including provision for residential, commercial and recreational land use
- Investigate investment opportunities to implement the Intergraded Food and Fibre Hub project
- Continue to engage with the WA Department of Health regarding health services and future provisions for the community
- Investigate potential tourism projects, notably caravan park redevelopment
- Support the modification of the Shire’s Planning Policy to enable renewal of heritage buildings for retail and commercial occupancy
- Continue to support the aged friendly initiaitve
- Site identification to continue development of aged care units, including attraction initiatives for ‘Lifestyle Village’ development
- Investigate the development of a ‘family friendly’ park
- Support the utilisation of rail and CBH/WATCO partnership

Shire of Wandering

Context

The Shire of Wandering covers an area of approximately 1,901 km square and has a population of 447 people (2.5% of the Wheatbelt South population). The Shire contains the localities of Bannister, Blackboy Springs, Codjatotine, Dwarda, Hastings, North Bannister, Pumphreys Bridge, Wandering and Wandering Downs. The administration for the shire takes place within the town of Wandering which is located approximately 120 kilometres southeast of Perth. Wandering is located on the Wandering – Narrogin road.

Characteristics

The Wandering LGA has the following characteristics:

- An estimated residential population of 447 persons in 2011, 34.6% higher than the estimated 332 residents in 2001. The WA Planning Commission forecasts the population trend to continue over the next decade, albeit slower, increasing a further 18% to 527 by 2021.
- The proportion of the population aged 14 years or younger (21.5%) is greater than the WA average (19.7%). The proportion of persons aged over 65 years (14.8%) is also greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Shire of Wandering has a fertility rate of 3.05 children (in 2011), well above replacement levels (2.1) and above the sub-regional average (2.99).
- Median personal income levels for Shire of Wagin ($37,093) are above the sub-regional average ($36,231) but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of Wandering's primary economic contributor, accounting for some 86,305 ha of land. This accounts for 2% of the total area of agricultural land holdings in the subregion.
- The Shire of Wandering's economy is underlined by an employment self sufficiency rate of 61% (in 2011). This, coupled with an unemployment rate of 2.1% demonstrates a drive in drive out connectivity with surrounding communities, particularly the mines in the Shire of Boddington.
- The Shire of Wandering has one primary school with 45 students.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production remain the dominant agricultural activities within the Shire. Harvested grain is carted directly to metropolitan Perth, with convenient and direct access to Albany Highway. Viticulture in an emerging industry with several wineries, including Wandering Brook Estate, Tanglefoot Vineyards and Wandering Lane all located within the Shire. The potential for branding of boutique products presents a strong opportunity. Light Industrial land is limited in Wandering and requires expansion to complement residential land sales and new business opportunities. Proximity to mines and the South east suburbs of Perth provide reliable market for the trades sector to locate to Wandering. An Economic Development Alliance between the communities of Boddington, Wandering and Williams has been established (Hotham Williams Economic Development Alliance Inc) *to develop and promote regional growth and facilitate economic development of Marradong Country*[64]. With farming, mining and tourism identified as the Marradong Country's key economic drivers, this Alliance provides Wandering a significant opportunity to target growth.

Lifestyle, Amenity and Retirement

The Shire is recognised as a community suitable to residents seeking a rural lifestyle with the convenience of access to regional centres. With a 35 minute drive to Boddington (two mine sites) and 50 minutes to Armadale, there is opportunity to attract a commuting workforce. To support this, the residential fabric will require diversification, particularly smaller unit accommodations for workers, retires and weekenders. Blackboy Springs Estate is a new local subdivision and has initiated the land sale and development process. Although retail services are limited in the town, the feasibility of commercial investment may become increasingly justified with this transition.

Tourism

Tourism is an emerging industry for the Shire. The 1.5 hour commute from Perth CBD has promoted the establishment of day trip activities, notably wineries which provide cellar tastings. Walking and mountain-biking (Bibbulmum Track, Mt Cooke Trail and the Munda Biddi Trail) are popular activities that pass through the Shire attracting over 21,000 visitors to the Munda Biddi Trail[65] (mountain-biking trail) and approximately 165,000 walks made on the Bibbulmum Track[66] per year. The Shires support to the Boddington Super Towns program has fostered a valuable relationship with the Hotham Williams Economic Development Alliance and support to further develop Marradong Country. This Alliance enhances the opportunities for Wandering through Marradong Country's regional branding and specialised support networks to grow local business.

Actions

A series of actions require implementation for the Shire of Wandering LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Investigate tourism enhancement projects, including development of short/long term accommodation and marketing of events
- Promote and facilitate the release of new industrial and commercial land
- Investigate the feasibility of a regional waste facility
- Bowling green upgrade project
- Investigate investment toward commercial precinct development (similar design to Williams Woolshed or Hyden Bush Village Shopping Centre)

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[64] http://marradongcountry.org.au/business/about-sub?aid=1 accessed: 17 July 2014
[65] http://www.mundabiddi.org.au/explore-the-trail/history-of-the-trail.html accessed: 17 July 2014*
[66] http://www.bibbulmuntrack.org.au/media/files/user_survey_results/Bibbulmun_Track_User_Survey_stats_2008.pdf accessed: 17 July 2014. Data sources are drawn from statistics collated for the total length of each trail.

Shire of West Arthur

Context

The Shire of West Arthur covers an area of approximately 2,850 km square and has a population of 892 people (4.9% of the Wheatbelt South population). The Shire contains the localities of Arthur River, Bokal, Bowelling, Darkan, Duranillin, Mokup, Moodiarrup and Trigwell. The administration for the shire takes place within the town of Darkan which is located approximately 200 kilometres South-southeast of Perth, along the Collie-Lake King Highway.

Characteristics

The West Arthur LGA has the following characteristics:

- An estimated residential population of 892 persons in 2011,1.5% lower than the estimated 906 residents in 2001. The WA Planning Commission forecasts the population trend to decline a further 12% to 782 by 2021.
- The proportion of the population aged 14 years or younger (22.1%) is greater than that of the WA average (19.7%). The proportion of persons aged over 65 years (15.9%) is also greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Shire of West Arthur has a fertility rate of 4.15 children (in 2011), well above replacement levels (2.1) and well above the sub-regional average (2.99).
- Median personal income levels for Shire of West Arthur ($37,736) are above the sub-regional average ($36,231) but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of West Arthur's primary economic contributor, accounting for some 244,030 ha of land. This accounts for 7% of the total area of agricultural land holdings in the subregion.
- The Shire of West Arthur's economy is underlined by an employment self sufficiency rate of 85% (in 2011). This coupled with a very low unemployment rate of 1.7% indicates some drive in drive out connectivity with surrounding communities such as Wagin and Collie as well as a significant number of home based agricultural businesses.
- The Shire of West Arthur has one primary school in Darkan with 76 students.
- The West Arthur Health and Resource Centre based in Darkan, accommodates visiting health services (Doctor, Chiropractor, Physiotherapist and Home and Community Care).

<u>Economic opportunities</u>

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cerial cropping and livestock production remain the dominant agricultural activities within the Shire. The Shire has an active Landcare committee that undertakes crop trials to engage young entrepreneurial farmers. Endeavors to capture light industrial and manufacturing businesses from the metropolitan region continues to be supported by the strong presence of Pedrick Engineering. The Shire in partnership with Landcorp are undertaking feasibility studies to extend the provision of serviced light industrial land. Transport and logistics traffic will continue to intensify along the Coalfields Hwy (Collie-Lake King route) with Bunge Australia's grain movements to service their bulk grain export facility at Bunbury Port and development of V and V Walsh's abbatoir (Bunbury) to freight 500,000 lambs and 30,000 cattle internationally. The proposed realignment of sections along the Collie-Lake King Highway (Albany Highway, Bowelling curves and Gibbs Siding) is expected to address some road concerns.

Tourism

Accommodating a range of adventure sports including water sports at Lake Towerinning, walking, cycling and horse-riding trails and skydiving at Hillman Farms, the Shires natural attributes (water ways, clear skys and landscapes) present an opportunity for further investigation and development of eco and nature-based tourism across the Shire. The majority of accommodation listings are based in Darkan although are limited in type and unable to cater for large groups (unless camping). There are a couple of eateries that can accommodate through traffic (service station at Arthur River and pub, cafe and service station at Darkan) of which add to the Shire's amenity and lifestyle characteristics.

Actions

A series of actions require implementation for the Shire of West Arthur LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Investigate tourism enhancement projects, including signage to improve walk trails and caravan park redevelopment
- Support for the implementation of the Living Lakes Project
- Expansion of the Health and Resource Centre project, a $1.2 million funded project
- Continue to support the Well Aged 4WDL Housing initiative and age friendly communities
- Completion of Landcorp Light Industrial Feasibility Study
- Investigate realignment of Collie-Lake King Highway as part of Main Roads Grain Freight Improvement Program
- Monitor and investigate the impacts of Albany Highway and Collie Lake King Highway realignment on small buinesses and heritage buildings

Shire of Wickepin

Context

The Shire of Wickepin covers an area of approximately 2,042 km square and has a population of 892 people (4.9% of the Wheatbelt South population). The Shire contains the localities of Gillimanning, Harrismith, Tincurrin, Toolibin, Wickepinand Yearlering. The administration for the shire takes place within the town of Wickepin which is located approximately 220 kilometres southeast of Perth. Wickepin is located along the Williams-Kondinin Road.

Characteristics

The Wickepin LGA has the following characteristics:

- An estimated residential population of 767 persons in 2011, 3.1% greater than the estimated 744 residents in 2001. The WA Planning Commission forecasts the population trend to reverse over the next decade, declining 7% to 717 by 2021.
- The proportion of the population aged 14 years or younger (22.9%) is greater than that of the WA average (19.7%). The proportion of persons aged over 65 years (16.3%) is also greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Shire of Wickepin has a fertility rate of 3.43 children (in 2011), well above replacement levels (2.1) and well above the sub-regional average (2.99).
- Median personal income levels for Shire of Wickepin ($32,401) are below the sub-regional average ($36,231) and significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of Wickepin’s primary economic contributor, accounting for some 202,259 ha of land. This accounts for 6% of the total area of agricultural land holdings in the subregion.
- The Shire of Wickepin’s economy is underlined by an employment self sufficiency rate of 64% (in 2011). This coupled with a low unemployment rate of 3.2% indicates that there is a high drive in drive out connectivity between neighbouring communities such as Narrogin.
- The Shire of Wickepin has three primary schools in Tincurrin (Kindergarten – Year 4), Yealering and Wickepin with 8, 26 and 58 students respectively.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production for meat and wool remain the dominant agricultural activities within the Shire. The 2013 upgrade of the sheep sale yard facility has attracted sellers from surrounding Shires, including Narrogin. The proximity to Narrogin is an opportunity to capture increased activity, business and employment. This may support the development of agrotourism to showcase local attractions including the Rabbit Proof fence and Facey Homestead. This opportunity is recogised by the The Wickepin Facey Group, who conduct agricultural trials, demonstrations and extention works throughout the region. Their endevours continue to enable farmers to adopt beneficial practices that support local production and economic returns.

Lifestyle, Amenity and Retirement

Wickepin is located 30km north-east of Narrogin and presents an opportunity for the community to be viewed as a satellite town to Narrogin. This proximity provides many advantages to residents in Wickepin including, a 20 minute commute for alternate employment options, specialised retail and secondary education, serviced residential and rural-residential land (with plans to expand availability), basic retail conveniences (deli/gift store, grocery store, post office), sport and recreation facilities (indoor recreation centre, bowling green, tennis court, golf course, swimming pool), primary school, health centre, independent living units and fuel access. The development of a Trails Master Plan (draft) for Wickepin, identifies the value of trail experiences and interpretation on improving townscape amenity, heritage and connection and increases the range of recreation options for current and future residents.

Mining

Although mining has not been identified as a key economic contributor to the Wheatbelt South sub-region, Wickepin has an evident strength in this area with the presence of Kaolin mine site. There are plans to expand the site to supplement international export demand (China, Japan and Korea). Exploration is likely to extend beyond current focus on building materials (clay for bricks and lateritic gravel for road construction) This may include archaean, duricrust, colluviums and alluvial minerals.

Actions

A series of actions require implementation for the Shire of Wickepin LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Continue to promote the new sale yard facility for sub regional use, including sale events
- Support Kaolin mine in exploration opportunities and expansion plans
- Investigation into the expansion of residential zoned land, including lifestyle lots
- Investigate the development of an additional 4-6 Well-Aged housing (Independent Living Units)
- Implement Wickepin walk trails Master Plan

Shire of Williams

Context

The Shire of William's covers an area of approximately 2,306 km square and has a population of 931 people (4.9% of the Wheatbelt South population). The Shire contains the localities of Boraning, Congelin, Culbin, Dardadine, Quindanning (part), Tarwonga and Williams. The administration for the shire takes place within the town of Williams which is located approximately 160 kilometres southeast of Perth along the Albany Highway.

Characteristics

The William's LGA has the following characteristics:

- An estimated residential population of 931 persons in 2011, 2.5% less than the estimated 955 residents in 2001. The WA Planning Commission forecasts the population trend to continue over the next decade, declining a further 2% to 911 by 2021.
- The proportion of the population aged 14 years or younger (20.5%) is greater than that of the WA average (19.7%). The proportion of persons aged over 65 years (14.6%) is also greater than the Perth Metropolitan Region (12.5%) and WA average (12.3%). The Shire of Williams has a fertility rate of 3.62 children (in 2011), well above replacement levels (2.1) and well above the sub-regional average (2.99).
- Median personal income levels for Shire of Williams ($37,758) are above the sub-regional average ($36,231) but significantly below the Perth ($53,864) and WA ($53,227) averages.
- Agricultural industries are the Shire of William's primary economic contributor, accounting for some 188,176 ha of land. This accounts for 5% of the total area of agricultural land holdings in the subregion.
- The Shire of William's economy is underlined by an employment self sufficiency rate of 74% (in 2011). This coupled with an unemployment rate of 4.1% Indicates that there is a drive in drive out connectivity between neighbouring communities such as Narrogin.
- The Shire of William's has one primary school with 122 students.

Economic opportunities

The following economic opportunities have been identified:

Agriculture, Livestock and Food Supply Chain

Broadacre cropping and livestock production remain the dominant agricultural activities within the Shire. This strength can be reflected in farm amalgamations and proximity to Narrakine's CBH processing facility. There is scope to double storage capacity of this facility if improvements and upgrades are made available to road networks. Value could be added to boutique agriculture with specialty organics, olives, vineyards and the processing of malt, chaff and grain pallets produced within the Shire. Industrial business growth will be supported if land subdivision, rezoning and improvements are made to telecommunication systems. The exposure from Albany Highway is also advantageous to this. An Economic Development Alliance between the communities of Boddington, Wandering and Williams has been established (Hotham Williams Economic

Development Alliance Inc) *to develop and promote regional growth and facilitate economic development of Marradong Country*[67]*.* With farming, mining and tourism identified as the Marradong Country's key economic drivers, this Alliance provides Williams a significant opportunity to target growth in Agriculture, Livestock and the Food Supply Chain and Tourism.

Lifestyle, Amenity and Retirement

The Shire is located approximately 51km from the two Boddington mine sites(Newmont Gold Mine and Worlsey Alumina). This location positions the Shire to capitalise on the drive-in drive-out and fly-in fly-out industry, attracting mine workers wanting to live in proximity to their workplace. Williams is 30km west of Narrogin, providing residents an alternate lifestyle and 20 minute commute to the regional centre. Interest has been expressed from private investors to develop lifestyle blocks along both Quindanning and Williams Rivers. This activity and developer interest could promote future business growth and employment prospects.

Tourism

Tourism is an emerging industry within the Shire. Development opportunities are likely to reflect cultural and nature based assets, such as the Woolshed, nature trails (for multi use bushwalking, horse riding and cycling activities) and Lions Park (a picturesque riverside picnic and BBQ space). The exposure from Albany Highway is an advantage for business establishment, including overnight accommodation (such as B&Bs). This would enable visitors to fully experience the town's attractions. The Shires support to the Boddington Super Towns program has fostered a valuable relationship with the Hotham Williams Economic Development Alliance and support to further develop Marradong Country. This Alliance enhances the opportunities for Williams through Marradong Country's regional branding and specialised support networks to grow local business.

Actions

A series of actions require implementation for the Shire of Williams LGA to effectively leverage the economic opportunities identified above and to be favorably positioned to capture support from community, investors and government.

- Support the modification of The Shire of Williams' Planning Policy to enable renewal of heritage buildings for retail and commercial occupancy
- Continue to build strong network and working relationships with Boddington Mine companies (Newmont and Worsely Alumina) to ensure support in achieving community focused projects
- Investigate redevelopment of Lions Park to further capture drive through visitors
- Investigate the redevelopment and facility upgrades at the recreation centre
- Coordinate a marketing strategy to promote the avilability of residential and light industrial land

[67] http://marradongcountry.org.au/business/about-sub?aid=1 accessed: 17 July 2014

Appendix B – Industry Value Add

Table 3 Industry Value Added and Gross Regional Product, Wheatbelt South, 2010/11 to 2012/13

Industry	2010/11	2011/12	2012/13
Agriculture, forestry & fishing	$185,340,170	$275,796,485	$149,259,278
Mining	$218,108,279	$260,897,456	$278,668,783
Manufacturing	$20,339,328	$24,158,152	$23,573,038
Electricity, gas, water & waste services	$18,305,403	$21,901,019	$20,599,810
Construction	$51,593,463	$66,577,072	$63,619,129
Wholesale trade	$29,800,937	$35,788,885	$36,237,736
Retail trade	$30,848,320	$36,372,345	$37,210,417
Accommodation & food services	$8,873,538	$10,951,838	$10,694,694
Transport, postal & warehousing	$46,969,015	$53,701,354	$53,101,553
Information media & telecommunications	$4,277,469	$4,589,052	$4,178,426
Financial & insurance services	$25,661,120	$28,794,945	$28,282,738
Rental, hiring & real estate services	$4,941,803	$6,111,315	$6,444,831
Professional, scientific & technical services	$15,190,516	$17,489,515	$17,829,129
Administrative & support services	$9,229,433	$9,983,336	$10,469,767
Public administration & safety	$37,348,118	$42,318,792	$41,405,332
Education & training	$34,711,836	$39,104,723	$38,489,262
Health care & social assistance	$43,057,558	$49,112,398	$50,610,888
Arts & recreation services	$1,170,929	$1,338,811	$1,306,487
Other services	$13,862,474	$16,869,215	$15,579,372
Industry Value Added	**$799,629,709**	**$1,001,856,711**	**$887,560,670**
Ownership of Dwellings	$53,004,239	$66,409,055	$58,832,829
Gross Value Added	**$852,633,949**	**$1,068,265,765**	**$946,393,499**
Taxes Less Subsidies	$30,186,306	$37,820,447	$33,505,731
Statistical Discrepancy	$257,624	$322,778	$285,954
Gross Regional Product	**$883,077,879**	**$1,106,408,990**	**$980,185,184**

Appendix C – Socio-Economic Indicators Matrix

Attached.

Theme	Indicator	Source	Brookton	Corrigin	Cuballing	Dumbleyung	Kondinin	Kulin	Lake Grace	Narrogin S	Narrogin T	Pingelly	Wagin	Wandering	West Arthur	Wickepin	Williams	Wheatbelt South
Population	Population (2001)	ABS3218.0	1,044	1,297	722	750	1,029	906	1,609	770	4,750	1,211	1,871	332	906	744	955	18,896
	Population (2011)	ABS3218.0	956	1,088	884	622	1,067	854	1,404	897	4,357	1,192	1,884	447	892	767	931	18,242
	Share of Wheatbelt South Population	Calc	5.2%	6.0%	4.8%	3.4%	5.8%	4.7%	7.7%	4.9%	23.9%	6.5%	10.3%	2.5%	4.9%	4.2%	5.1%	100.0%
	Population (2011 Census)	ABS Census 2011	934	1,063	870	605	1,045	826	1,360	875	4,219	1,163	1,847	438	868	750	914	17,777
	Population Growth (No. 2001 to 2011)	Calc	-88	-209	162	-128	38	-52	-205	127	-393	-19	13	115	-14	23	-24	-654
	Population Growth Rate (% 2001 to 2011)	Calc	-8.4%	-16.1%	22.4%	-17.1%	3.7%	-5.7%	-12.7%	16.5%	-8.3%	-1.6%	0.7%	34.6%	-1.5%	3.1%	-2.5%	-3.5%
	Annual Population Growth Rate (% 2001 to 2011)	Calc	-0.9%	-1.7%	2.0%	-1.9%	0.4%	-0.6%	-1.4%	1.5%	-0.9%	-0.2%	0.1%	3.0%	-0.2%	0.3%	-0.3%	-0.4%
	WAPC Projections (2021)	WAPC	786	1,188	904	492	937	774	1,204	1,097	4,857	1,192	1,784	527	782	717	911	18,152
	Population Growth (No. 2011 to 2021)	Calc	-170	100	20	-130	-130	-80	-200	200	500	0	-100	80	-110	-50	-20	-90
	Population Growth Rate (% 2011 to 2021)	Calc	-18%	9%	2%	-21%	-12%	-9%	-14%	22%	11%	0%	-5%	18%	-12%	-7%	-2%	0%
	Annual Population Growth Rate (% 2011 to 2021)	Calc	-1.9%	0.9%	0.2%	-2.3%	-1.3%	-1.0%	-1.5%	2.0%	1.1%	0.0%	-0.5%	1.7%	-1.3%	-0.7%	-0.2%	0.0%
Demographics and Socio-Economics	Share of Population Aged 0-14 (% 2011 Census)	ABS Census 2011	20.0%	18.0%	20.5%	20.3%	18.4%	24.5%	21.7%	19.5%	23.3%	21.6%	20.7%	21.5%	22.1%	22.9%	20.5%	21.4%
	Share of Population Aged 0-14 (% 2011)	ABS3235.0	19.5%	18.0%	20.8%	20.9%	16.4%	24.6%	21.7%	18.6%	23.2%	21.5%	19.6%	20.6%	22.0%	23.9%	20.2%	20.8%
	Share of population aged 65+ (% 2011 Census)	ABS Census 2011	23.2%	21.4%	16.1%	16.9%	11.1%	12.8%	10.8%	10.5%	15.4%	20.0%	19.7%	14.8%	15.9%	16.3%	14.6%	16.0%
	Male Share of Population (% 2010)	ABS3235.0	49.5%	50.7%	50.3%	52.9%	57.0%	50.6%	53.06%	53.51%	47.85%	50.25%	50.21%	52.13%	50.45%	51.50%	51.77%	50.7%
	Fertility Rate (2011)	ABS3301.0	2.20	2.96	2.55	3.65	2.27	3.24	2.67	2.18	2.52	3.37	2.95	3.05	4.15	3.43	3.62	2.99
	Baby Bonus Receipient (2010)	ABS National Regional Profile	17	18	8	14	15	15	17	12	63	17	31	5	9	12	18	271
	Average Individual Wage and Salary Income (2006)	ABS6524.0	27574	28882	29623	23286	23673	24775	28000	32725	32854	25749	27349	25885	26729	21758	29358	27215
	Average Individual Wage and Salary Income (2010)	ABS6524.0	37095	37088	37780	32347	32370	32339	32373	40236	41950	37112	37790	37093	37736	32401	37758	36231
	Median Personal Income (weekly)	ABS Census 2011	456	539	469	497	610	540	616	532	506	411	460	738	500	496	611	532
	Median Household Income (weekly)	ABS Census 2011	867	915	895	810	920	918	993	1309	955	759	828	1298	887	777	1107	949
	Number of Newstart Allowance Receipients (2010)	ABS National Regional Profile	31	np	np	np	29	np	np	30	136	50	58	np	24	np	np	358
Housing and Dwellings	Occupied Dwelling Stock (2011)	ABS Census (2011)	340	440	335	258	339	323	541	287	1537	451	728	164	354	289	366	6752
	Unoccupied Dwelling Stock (2011)	ABS Census (2011)	137	181	81	112	145	113	181	70	347	142	199	81	124	123	82	2118
	Total Dwelling Stock (2011)	Calc	477	621	416	370	484	436	722	357	1884	593	927	245	478	412	448	8870
	Dwelling Occupancy Rate (2011)	Calc	71.3%	70.9%	80.5%	69.7%	70.0%	74.1%	74.9%	80.4%	81.6%	76.1%	78.5%	66.9%	74.1%	70.1%	81.7%	76.1%
	Attached Housing Share of Occupied Dwelling Stock (No) 2006	ABS Census (2006)	12	5	np	3	10	9	10	0	30	15	18	0	0	0	6	118
	Attached Housing Share of Occupied Dwelling Stock (No) 2011	ABS Census (2011)	8	6	np	4	6	6	10	0	71	4	6	3	5	3	3	135
	Attached Housing Share of Occupied Dwelling Stock (%) 2011	Calc	1.68%	0.97%	#VALUE!	1.08%	1.24%	1.38%	1.39%	0.00%	3.77%	0.67%	0.65%	1.22%	1.05%	0.73%	0.67%	1.52%
	Residential Building Approvals (No 2009/10 to 2011/12)	ABS8731.0	17	5	12	6	8	8	13	12	70	19	19	29	3	13	15	249
	Annual Average Residential Building Approvals (No 2009/10 to 2011/12)	Calc	6	2	4	2	3	3	4	4	23	6	6	10	1	4	5	83
	Median House Price (2006)	RPData	$152,000	$89,000	$134,000	$75,000	$75,000	$60,000	$92,000	$132,500	$183,750	$115,000	$132,500	$150,000	$107,500	$126,000	$183,000	$140,000
	Median House Price (2011)	RPData	$187,500	$95,000	$286,000	$118,000	$149,000	$75,000	$180,000	$260,000	$210,000	$197,500	$192,500	$195,000	$225,000	$87,500	$245,000	$186,500
	Median House Price (2012)	RPData	$151,000	$177,500	$176,500	$110,000	$150,000	$118,500	$217,500	$185,000	$182,500	$150,000	$170,750	$168,500	$200,000	$165,000	$226,000	$175,000
	Differential to Perth Metro Median House Price (2012)	Calc	$328,000	$301,500	$302,500	$369,000	$329,000	$360,500	$261,500	$294,000	$296,500	$329,000	$308,250	$310,500	$279,000	$314,000	$253,000	$304,000
	Median House Price Growth ($ 2006 to 2012)	Calc	-$1,000	$88,500	$42,500	$35,000	$75,000	$58,500	$125,500	$52,500	-$1,250	$35,000	$38,250	$18,500	$92,500	$39,000	$43,000	$35,000
	Median House Price Growth (% 2006 to 2012)	Calc	-1%	99%	32%	47%	100%	98%	136%	40%	-1%	30%	29%	12%	86%	31%	23%	25%
	Average Household Size (2011)	ABS Census (2011)	2.4	2.2	2.4	2.3	2.4	2.4	2.3	2.70	2.4	2.40	2.30	2.60	2.40	2.40	2.30	2.39
	Households (2011)	ABS Census (2011)	337	440	334	257	338	324	540	284	1538	452	728	165	352	288	367	449.60
	Median Multiple (Median House Price as ratio to Median Household Income) (2011)	Calc	4.16	2.00	6.15	2.80	3.11	1.57	3.49	3.82	4.23	5.00	4.47	2.89	4.88	2.17	4.26	
Labour Force and Skills	Working Age Population - 15+ (% 2011)	ABS3235.0	58%	60%	65%	63%	72%	61%	68%	70%	62%	60%	60%	64%	63%	63%	66%	64%
	Working Age Population - 15+ (% 2011)	ABS Census (2011)	57%	61%	63%	63%	71%	63%	68%	70%	61%	58%	60%	64%	62%	61%	65%	63%
	Average Annual Labour Force Size (2006)	DEEWR	628	856.25	456.75	504	763.75	675	1221.5	574.5	2655.25	668.25	1094	267.5	634.5	518.25	670	12188
	Average Annual Labour Force Size (2012)	DEEWR	663	830	552	510	779	705	1259	618	2646	672	1124	251	657	534	725	12525
	Average Annual Labour Force Size (2011)	ABS Censis (2011)	423	585	440	350	609	467	820	460	1885	491	837	241	479	370	551	
	Particpation Rate (2011)	Calc	56.3%	67.1%	63.9%	73.1%	69.7%	75.0%	77.0%	64.6%	58.2%	53.8%	56.4%	69.3%	70.7%	64.8%	75.5%	
	Particpation Rate (2011)	Calc	86.2%	93.0%	78.8%	103.7%	87.3%	109.5%	114.5%	84.6%	79.1%	71.8%	74.2%	70.7%	94.4%	91.5%	97.6%	86.7%
	Persons Employed (2006)	DEEWR	613	840	446	494	752	669	1216.5	558.25	2569	640.25	1055	259.75	622.25	498	661	11894
	Persons Employed (2012)	DEEWR	619	800	536	495	754	691	1249	579	2479	625	1084	234	639	511	716	12011
	Unemployment Rate (2006)	DEEWR	2.4%	1.9%	2.4%	2.0%	1.5%	0.9%	0.4%	2.8%	3.2%	4.2%	3.6%	2.9%	1.9%	3.9%	1.3%	2.41%
	Unemployment Rate (2012)	DEEWR	6.6%	3.6%	2.9%	2.9%	3.2%	2.0%	0.8%	6.3%	6.3%	7.0%	3.6%	6.8%	2.7%	4.3%	1.2%	4.10%
	Bachelor and Post-Graduate Level Post School Educational Attainment	ABS Census (2011)	51.0	69.0	63.0	58.0	67.0	67.0	130.0	89.0	328.0	52.0	102.0	94.0	62.0	41.0	84.0	1357.0
	Bachelor and Post Graduate Share of Working Age Population	Calc	9.6%	10.7%	11.4%	15.3%	9.1%	12.9%	14.2%	14.5%	12.7%	7.7%	9.3%	33.7%	11.5%	9.0%	14.1%	12.1%
	Certificate and Diploma Level Post-School Educational Attainment	ABS Census (2011)	146.0	207.0	178.0	111.0	200.0	133.0	251.0	187.0	822.0	207.0	320.0	65.0	153.0	121.0	163.0	3264.0
	Certificate and Diploma Level Share of Working Age Population	Calc	27.5%	32.1%	32.2%	29.2%	27.1%	25.7%	27.3%	30.6%	31.8%	30.5%	29.1%	23.3%	28.4%	26.5%	27.4%	29.1%
	Employment by Place of Residence (2011)	ABS Census (2011)	401.0	560.0	432.0	337.0	584.0	452.0	805.0	453.0	1755.0	454.0	796.0	239.0	468.0	362.0	545.0	8643.0
	White Collar Occupation Share of Employed Labour Force	ABS Census (2011)	49.13%	47.3%	43.1%	60.8%	43.7%	61.9%	53.7%	47.2%	28.9%	41.2%	38.3%	45.6%	60.7%	53.6%	46.4%	44.8%
	Blue Collar Occupation Share of Employed Labour Force	ABS Census (2011)	16.46%	22.1%	19.4%	13.4%	28.4%	13.1%	16.9%	18.5%	24.3%	22.7%	22.6%	29.3%	18.2%	19.3%	20.9%	21.0%
Employment, Industry, Business and Investment	Employment by Place of Work (2011)	ABS Census (2011)	423	506	222	289	752	382	766	263	1976	345	616	146	400	297	401	7784
	Retail Employment (2011)	ABS Census (2011)	41	37	3	15	36	15	41	6	304	21	58	9	7	6	29	628
	Retail Share of Employment (2011)	ABS Census (2011)	9.7%	7.3%	1.4%	5.2%	4.8%	3.9%	5.4%	2.3%	15.4%	6.1%	9.4%	6.2%	1.8%	2.0%	7.2%	8.1%
	Health Care and Social Assistance Employment (2011)	ABS Census (2011)	62	47	0	20	34	7	33	3	407	30	58	0	12	5	14	732
	Health Care and Social Assistance Share of Employment (2011)	ABS Census (2011)	14.7%	9.3%	0.0%	6.9%	4.5%	1.8%	4.3%	1.1%	20.6%	8.7%	9.4%	0.0%	3.0%	1.7%	3.5%	9.4%
	Construction Employment (2011)	ABS Census (2011)	7	31	11	0	26	14	21	12	107	10	33	3	7	7	8	297
	Construction Share of Employment (2011)	ABS Census (2011)	1.7%	6.1%	5.0%	0.0%	3.5%	3.7%	2.7%	4.6%	5.4%	2.9%	5.4%	2.1%	1.8%	2.4%	2.0%	3.8%
	Accommodation And Food Services Employment (2011)	ABS Census (2011)	9	19	6	4	46	9	19	0	88	11	21	4	6	6	30	278
	Accommodation And Food Services Share of Employment (2011)	ABS Census (2011)	2.1%	3.8%	2.7%	1.4%	6.1%	2.4%	2.5%	0.0%	4.5%	3.2%	3.4%	2.7%	1.5%	2.0%	7.5%	3.6%
	Employment Self-Sufficiency 2011	Calc	105%	90%	51%	86%	129%	85%	95%	58%	113%	76%	77%	61%	85%	82%	74%	90%
	Count of Businesses (2009)	ABS8165.0	130	244	116	117	194	179	383	103	431	181	291	57	197	131	152	2906
	Value of Non-Residential Building Approvals (2009/10 to 2011/12)	ABS8731.0	$1,922,400	$1,409,200	$588,800	$707,900	$3,199,900	$1,778,300	$4,221,000	$14,409,000	$8,014,400	$1,971,900	$2,564,600	$2,291,600	$1,314,500	$1,820,600	$1,354,200	47568300
	Average Value of Non-Residential Building Approvals (Annual)	Calc	$640,800	$469,733	$196,267	$235,967	$1,066,633	$592,767	$1,407,000.00	$4,803,000	$2,671,467	$657,300	$854,867	$763,867	$438,167	$606,867	$451,400	$15,856,100
	Light Commercial Vehicles (2011)	ABS9301.0	388.000	308.000	377.000	420.000	381.000	437.000	537.000	218.000	204.000	332.000	287.000	323.000	383.000	325.000	467.000	5387.000
	Light Commercial Vehicles per Resident	Calc	0.406	0.322	0.394	0.439	0.399	0.457	0.562	0.228	0.213	0.347	0.300	0.338	0.401	0.340	0.488	5.635
	Trucks	ABS9301.0	218.000	171.000	142.000	250.000	254.000	313.000	380.000	91.000	65.000	151.000	138.000	160.000	232.000	300.000	236.000	3101.000
	Trucks per Resident	Calc	0.228	0.179	0.149	0.262	0.266	0.327	0.397	0.095	0.068	0.158	0.144	0.167	0.243	0.314	0.247	3.244
Economy	Area of Agricultural Land Holdings (ha)	ABS7125.0	128,313	242,123	87,541	237,108	413,600	386,209	800,613	141,034	4	121,942	186,519	86,305	244,030	202,259	188,176	3,465,775
	Agricultural Land Share of Sub-Region	Calc	4%	7%	3%	7%	12%	11%	23%	4%	0%	4%	5%	2%	7%	6%	5%	
	Total Gross Value of Agricultural Production ($M)	ABS7125.0	33.1	60.9	38.8	59.9	90.9	89.5	192.8	47.4	0.0	38.6	46.4	23.3	70.2	46.5	56.6	894.9
	Total Gross Value of Agricultural Production Share of Sub-Region	Calc	4%	7%	4%	7%	10%	10%	22%	5%	0%	4%	5%	3%	8%	5%	6%	
	Gross Agricultural Production Value per ha ($)	Calc	$258	$252	$443	$253	$220	$232	$241	$336	$0	$317	$249	$270	$288	$230	$301	
Community Services and Facilities	Dedicated Aged Care Beds	Primary	43	15	0	4	4	0	5	0	159	15	24	0	0	0	0	269
	Aged Care Beds Share of Sub-Region	Calc	16.0%	5.6%	0.0%	1.5%	1.5%	0.0%	1.9%	0.0%	59.1%	5.6%	8.9%	0.0%	0.0%	0.0%	0.0%	100%
	Aged Care Establishment	Primary	1	1	0	0	1	0	0	0	2	1	1	0	0	0	0	7
	Number of F/T Eligible Year 12 Students	School Curriculum and Standards Authority	0	0	0	0	0	0	2	48	92	0	0	0	0	0	0	142
	Number of Private Primary Schools	Schools Online	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1
	Number of Public Primary Schools	Schools Online	0	0	0	2	2	0	2	0	2	1	0	1	1	3	1	15
	Number of Public Primary School Students	Schools Online	83	117	0	73	145	83	201	0	619	163	231	44	90	84	109	2042
	Number of Public Secondary Schools	Schools Online	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	2
	Number of District High Schools	Schools Online	1	1	0	0	0	1	1	0	0	0	1	0	0	0	0	5
	Number of Public Secondary School Students	Schools Online	9	19	0	0	0	28	32	107	565	0	40	0	0	0	0	800
	Number of Private Secondary Schools	Primary	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Number of Hospital Beds (Public)	AIHW	0	10	0	4	8	0	8	0	44	8	18	0	0	0	0	100
	Hospital Beds (Public) Share of Sub-Region	Calc	0.0%	10.0%	0.0%	4.0%	8.0%	0.0%	8.0%	0.0%	44.0%	8.0%	18.0%	0.0%	0.0%	0.0%	0.0%	100%
	Number of Libraries	Primary	2	1	0	2	2	1	4	0	2	1	1	1	1	1	1	20
	Number of CRCs	Primary	1	1	0	0	2	1	2	0	0	1	1	1	1	1	1	13
	Number of Child Care Centres	Primary	1	1	1	2	0	1	1	0	7	1	2	0	2	1	1	21