



Economic and Tourism Strategy: Background Analysis

Shire of Corrigin

NOTED BY COUNCIL ON 18 JULY 2017

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I.0 Introduction

I.1 Background and Purpose

In 2013, RPS Group, in collaboration with local government authorities and the Wheatbelt Development Commission, developed sub-regional economic development strategies for the Wheatbelt. These included the development of the *Wheatbelt South Sub-Regional Economic Strategy*.

Through this work it was recognised that the Wheatbelt South sub-region is the Wheatbelt's premier rural economy. It also has a critical mass of residential population that supports higher order education, health, aged care and social services, particularly in major centres. Meanwhile, it was recognised that tourism, food-related supply chain services and lifestyle and retirement sectors are also prominent contributors to the economy. Furthermore, emerging opportunities in mining, both in and around the sub-region, were identified.

Numerous regional initiatives have been undertaken in response to this strategic work. This has included aged care and child care service delivery, freight and visitor route upgrades and health infrastructure improvements, amongst others.

However, challenges and opportunities in the sub-region were found to vary between local government areas, especially between the peri-urban and inland communities. Preliminary economic development actions were identified for individual local government areas though it was recognised that this strategy did not present an exhaustive list of actions. Additionally, many local authorities have not had the capacity to deliver or facilitate the proposed actions.

The Shire of Corrigin (the Shire) forms part of the Wheatbelt South sub-region. The Shire consists of a main town site – Corrigin – and three smaller localities at Bullaring, Bulyee and Bilbarin which support agricultural businesses in the area. Much like many inland rural communities, the Shire has experienced declining population levels in response to technology advances and market concentration in the predominantly broad-acre agriculture sector in the region. The town of Corrigin is however centrally located along Brookton Highway and is home to a range of businesses and population services.

In early 2017, the Shire recognised that there was a need to undertake a more detailed local analysis to determine what initiatives and actions are required to meet the goals and aspirations of residents and the business community. In particular, the Shire proposed the development of an *Economic and Tourism Development Strategy* to demonstrate 'where the Shire and the private sector can drive and build economic development in the Shire for the next ten (10) year period, with specific emphasis on tourism.'¹

RPS Group has been engaged to develop the *Economic Development and Tourism Strategy* for the Shire in collaboration with Shire councillors and staff, local residents and businesses. In recognition of a need to develop an evidence base to inform the strategy that will guide activities over the next ten years, RPS Group has developed this research paper.

¹ Request for Quotation Part B - Economic and Tourism Development Strategy, Shire of Corrigin, 2017

1.2 Research Paper Approach

This research paper has sought to analyse relevant economic and demographic trends in order to identify and interrogate areas of focus for the proposed strategy. The research paper has therefore been based upon three core aims:

- **Identify economic challenges and advantages** including the capacity for opportunities to be realised and challenges mitigated;
- **Identify and interrogate local priorities** such as the aims of the local council and business community; and
- **Support decision making** to achieve coordinated and improved outcomes for the region.

The research paper incorporates the input and local knowledge of local council staff and councillors and the business community gathered through individual and workshop consultation. Detailed research undertaken in this research paper has been particularly guided by the participants within the *Economic and Tourism Development Strategy Working Group* (the Working Group). The Working Group has been formed to provide advice and feedback throughout the development of the strategy and associated action plan. The inclusion of the Working Group has ensured that recommended focus areas and priorities align with the needs and desires of the local business community.

In addition to above, the research paper and strategy has been developed alongside a review of major strategic plans which will guide the activities and funding commitments of the Shire over the next decade.

1.3 Document Structure

This research paper has been comprised of the following key sections:

- **Local profile** – desktop research and analysis of the local area's economy;
- **Regional influences** – exploration of the relevant regional and global trends and associated opportunities and challenges these present for the region's industries and communities;
- **Capacity for development** – an assessment of the prospects for the region through the prism of its economic, social and physical attributes and performance within a regional context, identifying key strengths and challenges;
- **Strategic context** – a summary of relevant strategic priorities in regards to economic development for the region; and
- **Economic opportunities** – a summary of identified opportunities to address economic and tourism development challenges and leverage local assets and strengths.

2.0 Local Profile

2.1 Location

The Shire of Corrigin (the Shire) is located within the Wheatbelt South sub-region in Western Australia. The Wheatbelt South sub-region was home to approximately 18,200 residents as of June 2015, with the population spread across more than 20 townsites and rural properties².

The Shire encompasses an area of 3,095 square kilometres and is predominantly a broad-acre agricultural area. The Shire contains the townsites of Bilbarin, Bullaring, Bulyee and Corrigin. The administrative centre of the Shire and largest townsite is Corrigin, which is located approximately 235 kilometres south-east of Perth along the Brookton Highway. Brookton Highway provides access to Wave Rock – the Wheatbelt’s major tourism attraction – and Esperance. The route is also heavily used by industry and residents in the wider region.

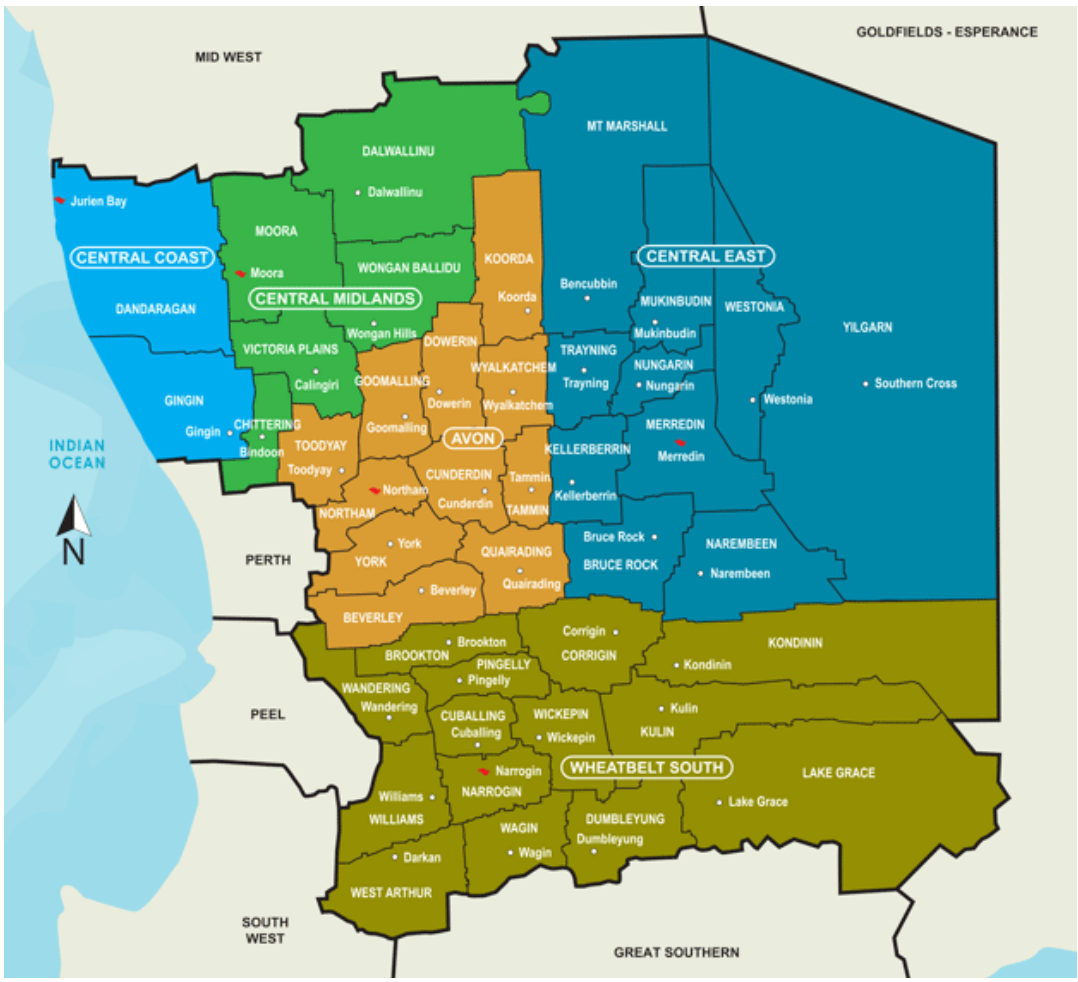


Figure 1 Wheatbelt Local Government Areas

² ABS (2017) Regional Population Growth, Australia, Cat No 3218.0, Australian Bureau of Statistics, Canberra

The townsite of Corrigin is centrally located within the Wheatbelt South sub-region. It is located approximately 200 kilometres from Perth's urban fringe along the recently upgraded Brookton Highway. The town is easily accessible from townsites within the wider area, including Narembeen, Bruce Rock, Kulin and Kondinin. As such, the town services a much larger catchment than its resident population would generally support.

2.2 History

Prior to the arrival of Europeans, the land was occupied by the Noongar Aboriginal people. One of three major groups in the Wheatbelt, the Njaki Njaki Nyoongar people traditional lands cover Corrigin and the towns of Nungarin, Trayning, Kununoppin, Doodlakine, Hines Hill, Kellerberrin, Merredin, Westonia, Carrabin, Bruce RockHyden, Kalgarin, Kondinin, Kulin, Muntadgin, Shackleton, Narembeen and Moorine Rock³.

The townsite of Corrigin was first gazetted in 1913 as 'Dondakin'⁴. This name was derived from the adjacent railway siding, which in turn was a form of the Aboriginal name of a nearby soak, Dondakine Soak. The local name, "Corrigin", was not accepted by railway authorities at first because of the likelihood of confusion with another siding called "Korrijinn". Eventually, due to public protest, Korrijinn was changed to "Bickey", and Dondakin changed to Corrigin on 15 May 1914. Corrigin is named after Corrigin Well, another local Aboriginal name, first recorded in 1877. The meaning of the name is not known.

Before 1908, the only connection Corrigin had with the outside world was the railway track which ran to Southern Cross. At that time it was practically impossible to get anyone to take up land near the rabbit proof fence⁵. Sheep were however run in the district as early as the 1860s with the leases for the Parker family extending down into the present Shire of Corrigin Shire area⁶.

A boom in sandalwood prices in the early 1880s saw sandalwood cutters move in to cut out as much of the aromatic timber as they could find. However it wasn't until the early part of the twentieth century that significant numbers of people moved into the area to take up land and to settle permanently⁷.

The Road Board was established in 1913 when the Kunjin Road Board was born under the terms of The Roads Act, 1911 and gazetted on the 4th February 1913⁸. The first Kunjin Road Board members held their meetings in a small timber and iron building with their first ever purchase being a billy, tea and sugar. After only three meetings it was decided to shift the meeting venue to the new townsite of Corrigin, as Kunjin was no longer under consideration as the major rail junction.

And so the Corrigin Road Board came to be, representing six divisional wards in the district, these being Kunjin, Bullaring, Kurrenkutten, Dondakin, Kondinin and Central (Kondinin replaced later by Wogerlin). The building was moved from Kunjin to Corrigin and served as the meeting place until 1923, when the new Road Board Office was constructed.

³ <<http://www.wheatbelttourism.com/heritage-the-arts/aboriginal-heritage/>>

⁴ <<https://www0.landgate.wa.gov.au/maps-and-imagery/wa-geographic-names/name-history/historical-town-names>>

⁵ <<http://trove.nla.gov.au/newspaper/article/41446877>>

⁶ <<http://www.aussietowns.com.au/town/corrigin-wa>>

⁷ Ibid.

⁸ <<http://www.corrigin.wa.gov.au/council/your-council/profile.aspx>>

As years went by the growth of the district became assured due to opportunities abound for agricultural development. In 1932, the Wheat Pool of Western Australia announced that the town would have two grain elevators⁹. By 1937 the town boasted a hall, a large state hotel, commercial buildings, bowling green, tennis courts, a golf course and showground.

Corrigin was widely known as 'A Town of Windmills' due to the abundant supply of ground water. Almost every home had a windmill until 1960 when the town was supplied with scheme water.

More recently, Corrigin has become better known for its 'Dog Cemetery'. With over 200 loved ones now buried, the cemetery is unique to Corrigin. This reputation was compounded in 2002 when the town assembled a total of 1,527 utility vehicles with a dog on the back tray and established a "Dog in a Ute" world record.

2.3 Community Profile

2.3.1 Population Trends

- **The Shire's population levels have approximately halved over the past fifty years however recently population levels have stabilised. This is expected to be a result of population ageing, recent investment in the region and moderately small migration levels to the Shire from the wider region.**
- **Corrigin is the most populated town between Perth and Esperance along the Brookton Highway. This reinforces Corrigin's role as a major servicing centre for the wider region's 8,500 residents as well as the large traffic and visitor levels which drive past Corrigin.**
- **The State Government expects that the Shire's population levels will remain broadly unchanged, albeit declining moderately over the next decade. Meanwhile, neighbouring areas are expected to experience much sharper population declines, with, in particular, the smaller and more easterly local governments expected to experience declines in the order of 20% to 30% over the 2011 to 2026 period. This presents an opportunity for Corrigin to develop into a wider servicing centre for these communities as they face challenges in maintaining services and businesses in the face of sharp population declines.**

As with a number of inland, small regional areas, the Shire of Corrigin has experienced declining economic and population growth alongside structural changes in the agricultural sector and ongoing urbanisation trends. The sharpest population declines occurred in the 1960s, 1970s and 1980s as Perth's suburbs expanded rapidly and Australia's economy moved further away from primary agricultural production. In the Shire, over this period, agricultural production gradually shifted further towards broad-acre production (between the 1970s and 2000s, the level of sheep farming fell 31.6% whilst the tonnes of wheat produced increased by 39.6%¹⁰).

The Shire of Corrigin's population has declined year-on-year for the past decade, albeit at a smaller rate than previous decades. This population stabilisation over recent years could be a reflection of improved technology, recent investment in the region's infrastructure and population ageing, amongst others.

⁹ <<http://trove.nla.gov.au/newspaper/article/32560140>>

¹⁰ ABS (2013) Historical Selected Agricultural Commodities, by State (1861 to Present), 2010-11, Cat No. 7124.0, Australian Bureau of Statistics, Canberra

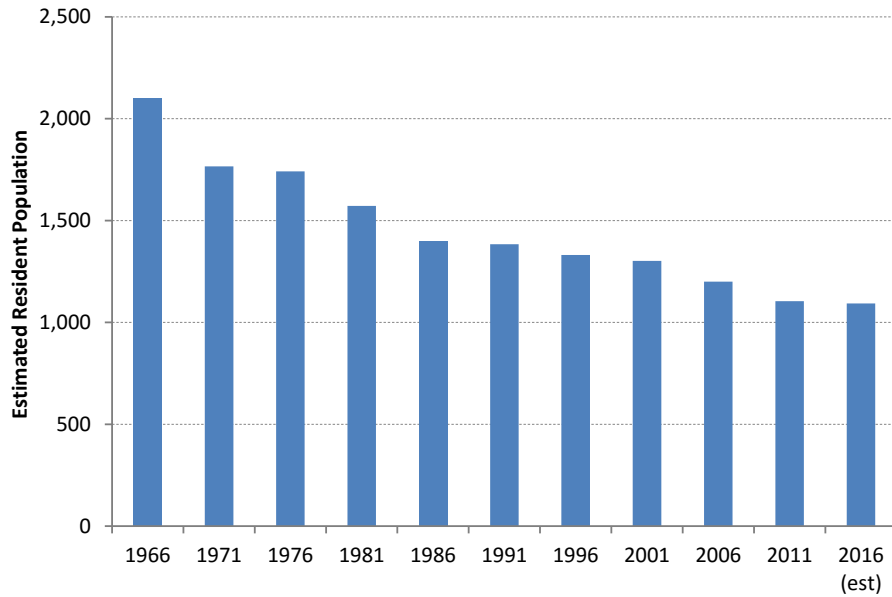


Figure 2 Historical Resident Population, Shire of Corrigin, 1966-2016¹¹

Neighbouring local government areas have experienced comparable population declines over the past five decades. However, in recent years, the more proximate local government areas to metropolitan Perth have experienced more stable population levels (apart from the Shire of Kondinin which has experienced relatively unchanged population levels over the past fifty years).

Table 1 Historical Resident Population, Selected Local Government Areas, 1966-2016¹²

Local Government Area	1966	1976	1986	1996	2006	2016
Shire of Corrigin	2,099	1,741	1,397	1,331	1,200	1,093
Shire of Narembeen	1,590	1,392	1,168	1,048	945	788
Shire of Bruce Rock	2,155	1,482	1,280	1,185	1,004	925
Shire of Quairading	1,745	1,471	1,165	1,236	1,071	1,020
Shire of Brookton	1,361	1,181	1,096	983	1,037	1,002
Shire of Pingelly	1,539	1,448	1,247	1,212	1,220	1,172
Shire of Wickipin	1,394	1,076	921	868	762	715
Shire of Kulin	1,393	1,291	1,117	975	922	796
Shire of Kondinin	1,262	1,299	1,199	1,197	1,019	1,051

Within the major urban centre of Corrigin, a somewhat sharper population decline has been recorded over the past decade. Between 2006 and 2011, the townsite's population has declined by 11.2% to 683 persons (compared to a decline of 4.9% across the rest of the Shire over this period)¹³.

¹¹ ABS (2017) Regional Population Growth, Australia, 2015-16, Cat No. 3218.0, Australian Bureau of Statistics, Canberra & historical Census of Population and Housing data

¹² Ibid.

¹³ ABS (2017) Small Area Population Estimates (unpublished), Australian Bureau of Statistics, Canberra

Nonetheless, Corrigin is one of the largest urban centres in the wider region. Corrigin is the most populated town between Perth and Esperance along the Brookton Highway. The most proximate larger towns include Pingelly, Narrogin, Merredin, York and Northam. This reinforces Corrigin’s role as a major servicing centre for the wider region’s 8,500 residents¹⁴.

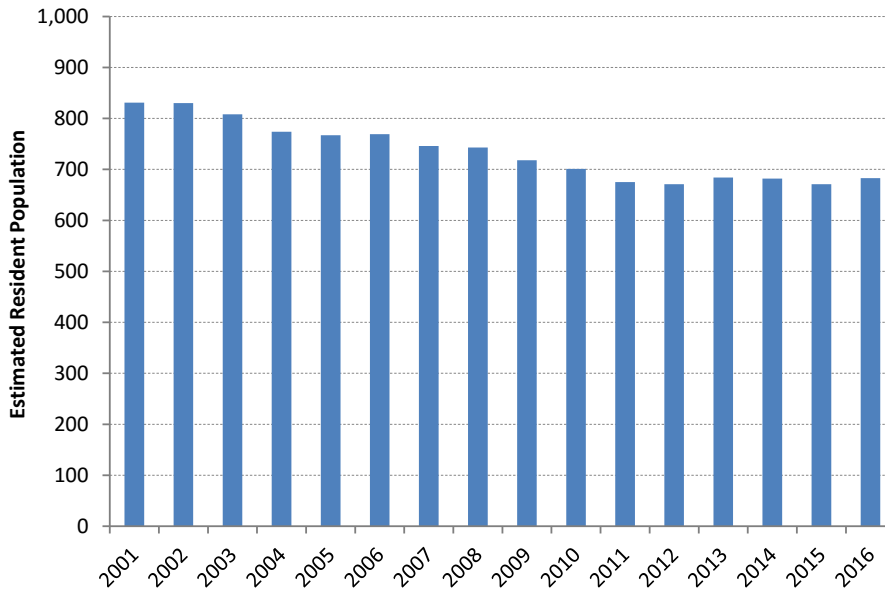


Figure 3 Historical Resident Population, Corrigin Townsite, 2001-2016¹⁵

An assessment of migration patterns between 2006 and 2011 has identified a number of characteristics for Corrigin¹⁶.

- **Migration from Shire:** Approximately half of residents that left the Shire between 2006 and 2011 moved to Perth. Only 20.1% of this cohort moved to other areas in the Wheatbelt (with very few moving to neighbouring areas), with coastal locations popular among this cohort.
- **Migration to Shire:** Approximately a third of residents that moved to the Shire between 2006 and 2011 moved from Perth and a further third moved from elsewhere in the Wheatbelt. Only a small proportion of residents moved from overseas or interstate (representing less than 20% of this cohort).

Looking forward, the State Government has projected the Shire’s residential population for the next decade. For the base case scenario, the State Government expects that the Shire’s population levels will remain broadly unchanged, albeit declining moderately. Underpinning this projection is an assumption that the Shire’s population will age significantly over this period (see Section 2.3.2).

¹⁴ As per table above

¹⁵ Ibid.

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

Table 2 Projected Population, Shire of Corrigin, 2011-2026¹⁷

Year	Low Growth	Base Case	High Growth
2011	1,100	1,100	1,100
2016	1,070	1,150	1,230
2021	1,010	1,130	1,250
2026	950	1,100	1,260

Neighbouring areas are expected to experience much sharper population declines in the coming decade. In particular, the smaller and more easterly local governments are expected to experience population declines in the order of 20% to 30% over the 2011 to 2026 period. This presents an opportunity for Corrigin to develop into a wider servicing centre for these communities as they face challenges in maintaining services and businesses in the face of sharp population declines.

Table 3 Projected Resident Population, Selected Local Government Areas, 2011-2026

Local Government Area	2011	2026	Proportion Change
Shire of Corrigin	1,100	1,100	-
Shire of Narembeen	840	670	-20.2%
Shire of Bruce Rock	1,000	760	-24.0%
Shire of Quairading	1,070	920	-14.0%
Shire of Brookton	970	950	-2.1%
Shire of Pingelly	1,210	1,150	-5.0%
Shire of Wickepin	770	580	-24.7%
Shire of Kulin	860	660	-23.3%
Shire of Kondinin	1,070	750	-29.9%

2.3.2 Demographic Characteristics

- The population profile has dramatically aged over the past five decades and nearly one third of residents are expected to be 65 years old and above by 2026 due to advances in life expectancy and the lack of inward migration of young adults and families.
- Corrigin attracts a large temporary workforce which was estimated at 50 persons in 2011. This temporary workforce supports a range of businesses in the town.
- The number of residents aged between 15 and 44 years of age declined by 40.0% between 2005 and 2015 (equivalent to 174 residents). Residents are considered to leave for many reasons, including employment, social/recreation interests and education options, amongst others.

Changing demographics have been stark throughout much of Australia's rural and regional areas. The Shire of Corrigin is no exception.

¹⁷ WAPC (2015) WA Tomorrow, Western Australian Planning Commission, Perth

In 1986, the Shire was home to nearly 500 children within hundreds of working families. The level of residents aged 65 and above was just 10.5%. Fast forward to 2015 and there were only 190 children and a quarter of the population was aged 65 and above.

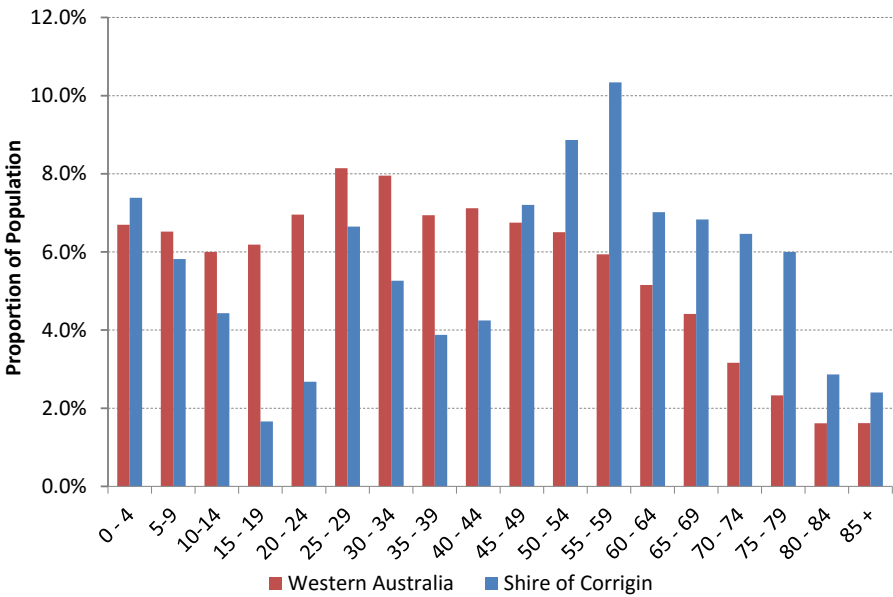


Figure 4 Age Profile, Shire of Corrigin and Western Australia, 2015¹⁸

Whilst improved health has led to people across the country living longer, many metropolitan areas have benefited from international migration and migration of young adults from regional and rural areas. According to migration analysis for the Shire, there has been limited and inconsistent migration to the Shire from young adults and families.

The region does however attract a young temporary workforce for the construction and agriculture sectors. For instance, as of the 2011 Census of Population and Housing, there were 50 non-residents recorded in the Shire, including 35 adults of working age. This level of transient workforce supports several local businesses such as cafes, the hotel and supermarkets.

Looking forward, the Shire’s population is expected to age rapidly over the next decade reflecting the fact that Shire already possesses a comparatively older population profile. The proportion of the population aged 65 and above is expected to increase to approximately one third by 2026¹⁹. This will present a range of challenges and opportunities for the Shire and other stakeholders (e.g. government health providers). An older population will require different health, community and accommodation services and not all these services will be able to replicated across each population centre in the area; investment and resourcing will be prioritised. Meanwhile, businesses will have to rely on attracting new workers to the area and encouraging residents to work longer.

Retention and attraction of workers and young residents is a key demographic challenge for the Shire and the broader region. The number of residents aged between 15 and 44 years of age declined by 40.0%

¹⁸ ABS (2016) Population by Age and Sex , Regions of Australia, Cat no 3235.0 , Australian Bureau of Statistics, Canberra
¹⁹ DoP (2015) WA Tomorrow, Department of Planning, Perth

between 2005 and 2015; equivalent to 174 residents²⁰. Residents are considered to leave for many reasons, including employment, social/recreation interests and education options, amongst others.

2.3.3 Socio-Economic Profile

- **Residents are considered relatively disadvantaged in terms of socio-economic attributes, in particular education levels. However residents were found to earn high incomes and have less financial stress than Western Australian averages. Older residents were also found to be less reliant on government financial assistance than state averages.**
- **Unemployment is estimated to have increased over the past five years and as such levels of long term unemployment assistance are above state averages. Moreover, young adults are less likely to be in employment or full-time study than state averages.**

The Socio-Economic Indexers for Areas (SEIFA) provides a measure of the relative disadvantage or advantage for an area. Scores above the midpoint of 1,000 indicate that a community is relatively advantaged – the higher the score the higher the relative advantage. Scores below 1,000 indicate relative disadvantage. The Shire of Corrigin's SEIFA score of 976 indicates that residents are relatively disadvantaged, albeit only moderately below average levels and on par with neighbouring areas²¹.

Based on a more detailed analysis of select socio-economic attributes, the following key findings have been highlighted for residents in the Shire of Corrigin.

- **High and Increasing Incomes:** Reportable incomes to the Australian Tax Office have increased year-on-year to in excess of \$58 million as of 2014/15 (up from \$24 million in 2010/11), with an increasing numbers of income earners reported (up 11.8%) and increasing median incomes (to levels 19% above the Wheatbelt median).
- **Increased Unemployment:** Unemployment is estimated to have increased from 4.1% to 6.0% over the past five years and, as a result, the number of adults on a form of unemployment benefit has increased 90% between 2012 and 2016.
- **Disengaged Youth:** 15-19 years-olds were found to be much less likely to be in full-time study or employment compared to regional Western Australia averages.
- **Independent Retirees:** Residents aged 65 and above in the Shire were found to be 12.1% less likely to be receiving the age pension compared to regional Western Australia averages.
- **Low Household Financial Stress:** Households were found to be approximately half as likely to be experiencing mortgage or rental stress compared to regional Western Australia averages.

²⁰ ABS(2016) Population by Age and Sex, Regions of Australia, Cat No 3235.0, Australian Bureau of Statistics, Canberra

²¹ Census of Population and Housing (2011) Socio Economic Indexes for Area Cat no 2033.055.001 Australia, Australian Bureau of Statistics

Table 4 Socio-Economic Characteristics

Characteristic	Shire of Corrigin	Regional Western Australia	Western Australia
Median Personal Income (2014/15)	\$54,204	\$50,264	\$52,989
Residents Aged 65+ Receiving Pension (2014)	58.8%	67.1%	65.1%
Working Age Persons Receiving Disability Support (2014)	6.5%	4.9%	3.7%
Working Age Persons Receiving Long-Term Unemployment Benefit (2014)	4.7%	4.7%	3.2%
Overseas-Born Population (2011)	13.2%	25.8%	37.1%
Estimated Aboriginal Population (2015)	3.4%	10.2%	3.6%
Fertility Rate (2011)	3.0	2.3	1.9
Early School Leavers (2011)	39.6%	40.2%	32.8%
Learning or Earning at Ages 15-19 (2011)	56.0%	70.1%	77.8%
Single Parent Families (2011)	15.7%	21.8%	19.9%
Jobless Families (2011)	16.3%	13.4%	11.2%
Households Receiving Rental Assistance (2014)	9.1%	14.2%	13.6%
Financial Stress from Mortgage or Rent (2011)	11.9%	23.6%	29.8%

2.3.4 Housing

- **Despite the large number of properties for sale and dwellings sitting vacant, there is a lack of available rental properties in Corrigin which constrains opportunities to expand businesses and attract new businesses.**
- **The Shire has experienced increasing building permit applications in recent years, with permits worth in excess of \$2.5 million approved in 2015/16.**
- **Corrigin has a significant supply of 31 serviced lots which have the opportunity to attract residents from more expensive housing markets. There is however a need to re-value lots on the market to reflect recent sales activity.**

Housing markets in Australia's rural and regional centres are influenced by a range of factors similar with those present in the capital city markets. These include:

- Population growth;
- The structural ageing of the population;
- The availability of land;
- The balance between supply and demand for housing; and
- The impact of housing finance.

However, regional housing markets, like that of the Wheatbelt communities, are influenced by a diverse range of factors not present or significant in capital city housing markets. These include issues such as scale, geography, spatial differentiation, population decline, demand for holiday/second homes and localism. These factors have influenced rapid changes in the level of housing affordability, choice and supply in rural Australia over the past two decades.

Within the Shire of Corrigin, population decline has had a significant impact on the market and the viability of redeveloping areas with older housing stock. As a result of the lack of inward migration to Corrigin, sales volumes are low and market prices have declined moderately over the past five years. The Corrigin area has recorded on average just 14.2 house sales and 3.3 land sales per annum over the past decade²². Land and housing in Corrigin is therefore significantly more affordable than Perth and regional Western Australia averages.

Table 5 Housing Characteristics²³

Characteristic	Corrigin	Regional Western Australia	Perth
Median Land Price (2015-2017)	\$45,000	\$175,000	\$255,000
Median House Price (2015-2017)	\$127,500	\$355,000	\$515,000
Occupied Housing Stock (2011)	TBC	TBC	TBC
Social Housing Stock (2011)	TBC	TBC	TBC
Rental Housing Stock (2011)	TBC	TBC	TBC

Within the Shire of Corrigin, housing has several key characteristics. Firstly, housing products have limited diversity. That is, there is a dominance of four or three bedroom separated dwellings, with the vast majority of the housing stock found to be built prior to 1990 (only about one sixth of residential properties are estimated to have been constructed in the last 26 years²⁴). This presents challenges to the attraction and retention of households with different needs such as elderly residents seeking a low maintenance property.

Secondly, despite the large number of properties for sale, there is a lack of available rental properties in Corrigin²⁵. As of writing there were no properties advertised online for rent in Corrigin.

Thirdly, as of 2011, about 28.0% of private dwellings in Corrigin were considered unoccupied (circa 180 empty dwellings across the Shire). This is relatively high compared to the Western Australian average of 11.0%. Whilst some of these are likely to be second homes, a high level of unoccupied stock can lead to high levels of crime, poor amenity and reduced vibrancy in neighbourhoods.

Lastly, distance from suppliers and tradesmen results in high costs of construction. Residential dwellings cost on average 25% to 35% more to build than within metropolitan Perth²⁶. However, prefabricated design trends may have a positive impact on addressing high costs over the medium term.

Despite the challenges noted above, the Shire has however experienced increasing building permit applications in recent years. The number of new dwellings approved for construction has increased to 10 in 2015/16²⁷.

²² RP Data (2017) Suburb Profile (unpublished)

²³ REIWA (2017) <<https://reiwa.com.au/wa/corrigin/6375/>> [accessed June 6, 2017]

²⁴ RP Data (2017) , [Accessed in April 2017 available]

²⁵ Property websites

²⁶ ABS (Building Approvals)

²⁷ ABS (Building Approvals)

Furthermore, Corrigin has a significant supply of serviced residential lots. Several years ago, the Shire developed a new land subdivision within Corrigin which includes 33 residential lots with underground power, street lighting, road infrastructure, deep sewage and access to Water Corporation scheme water. However only two lots have sold. Liaison suggests that lots pricing is not reflective of current market values. Additionally, marketing of the development is limited.

Nonetheless, the availability of affordable serviced lots in an attractive setting presents a number of opportunities for households to move to Corrigin. This could include retirees downsizing from Perth or other regional towns and could extend to families seeking to become home owners at a more attractive price point.

2.3.5 Population Services

- **Corrigin has a diverse and comprehensive range of services for residents in the Shire and wider region. Local businesses and community facilities service residents from across the region; residents which prefer to frequent Corrigin than smaller neighbouring towns.**

Corrigin is a central servicing town with a competitive range of medical, recreation, community and shopping facilities. The key community services have been noted below.

- **School:** Corrigin District High School offers pre-primary, primary and secondary education up to year 10, with year 11 and 12 options available through distance learning or boarding alternatives in Narrogin, Merredin and Perth. The school has however experienced declining student enrolments equivalent to 16% over the past two years, especially secondary school enrolments which increased to a high of 46 students in 2015 but have subsequently declined to 36 enrolments in 2017²⁸. High fertility rates though are expected to support an increase in student numbers in coming years (there were an estimated 80 children aged below five years old as of June 2015 in the Shire).
- **Community Resource Centre:** Co-located with the Shire administration building, the Corrigin CRC was established in 1998 and offers high tech facilities, meeting rooms for hire, community education & training, and government information and referral services that would otherwise not be available within the town site.
- **Medical Services:** The multipurpose Corrigin District Hospital has permanent care facilities and emergency health services. The townsite is also home to a medical centre, pharmacy, dental surgery, chiropractor, counselling services and visiting physiotherapy services. The Corrigin aerodrome accommodates the Royal Flying Doctor Service.
- **Recreation Facilities:** The Corrigin Recreation Precinct has recently been transformed to a multi-purpose sport and community facilities to complement the existing sports fields located at the precinct. The sporting precinct is equipped with 6 hectares of fully reticulated grassed area, including football oval (with WAFL standard lighting), separate hockey fields, netball and basketball courts, swimming pool and an indoor recreation facility.
- **Telecommunications:** Mobile internet services in the townsite are available and ADSL broadband internet connection is available with Westnet as the main internet service provider.
- **Public Transport:** TransWA connects Perth metropolitan to Esperance and passes through York, Quairading, Kondinin, Kulin, Corrigin and Ravensthorpe.

²⁸ DoE(2017) Student Numbers by Education Sector, Education Region and Individual Public School, Department of Education, Perth

- **Banks, Accommodation, Supermarkets and Cafes:** Unlike many neighbouring towns, Corrigin is home to multiple supermarkets and cafes, a butcher, the Corrigin Hotel, Corrigin Roadhouse, Windmill Motel, a NAB branch and Bankwest branch, newsagency and caravan park, amongst other business services.

In comparison, other neighbouring towns to the north, south and east have a much smaller number of services and retail businesses. Additionally, retail businesses appear to be operating at relatively higher turnover compared to neighbouring smaller towns.

2.4 Economy and Industries

2.4.1 Local Businesses

- **The business environment in the Shire is characterised by the dominance of small and non-employing businesses in agriculture, rental and hiring equipment, retail and construction sectors.**
- **The number of employing businesses has increased in recent years, with Corrigin able to attract agriculture services due to its central location along the Brookton Highway.**

According to the Australian Bureau of Statistics, there were 208 businesses registered in the Shire as of June 2015. Whilst business levels have broadly remained unchanged over the past five years, the number of employing businesses increased by eight over the 2012 to 2015 period, including three businesses with more than five staff (e.g. Rural Traffic Management, Dawn Café).

Table 6 Business Registrations, Shire of Corrigin, 2015²⁹

Industry	Number of Businesses
Agriculture	113
Manufacturing	4
Construction	15
Wholesale Trade	6
Retail Trade	15
Hospitality	3
Logistics	9
Finance and Insurance	7
Rental, Hiring and Real Estate	17
Professional Services	8
Health Care	3
Other/Unknown	9

The business environment in the Shire is characterised as having a significance presence of small businesses. About 64.0% of new register business are non-employing and a further 35.0% hire between 1-4 employees. Moreover, there is a relatively high proportion of business in the agriculture sector (54.1%).

Significantly, Corrigin is home to a range of agricultural service businesses such as dealerships and contractor services which have increased their presence in the town over the past five years (benefiting from

²⁹ ABS (2017) Counts of Australian Businesses including Entries and Exits, Cat No 8165, Australian Bureau of Statistics, Canberra

the town's CBH facility). There is scope for Corrigin to expand these services as it becomes increasingly unviable for these services to be duplicated in smaller neighbouring towns. There is however a need to address the lack of readily available service commercial and industrial property. As of writing, there were found to be zero commercial, service commercial or industrial lots or properties currently on the market for lease or purchase in Corrigin (although analysis shows that a number of tenanted properties have changed hands in the past 12 months with relatively high rental returns)³⁰. There is scope for subdivision of existing privately held sites and a need to identify future expansion areas.

2.4.2 Employment Profile

- **Agriculture and associated services are responsible for the majority of employment in the Shire.**
- **The level of jobs in the Shire increased between 2006 and 2011 despite population levels declining over this period.**
- **Workers are more likely to be older and less qualified than regional Western Australian averages. Workers were however much more likely to have worked from their residence which is partly a reflection of large agriculture sector employment.**

There is approximately 242,123 hectares of agriculture land (representing 7% of the total area of agriculture land holdings in the Wheatbelt South sub-region³¹) in the Shire which is predominantly for broad-acre production. Directly, more than a third of the Shire's estimated 514 jobs in 2011 were within the agriculture sector. Meanwhile, logistics, wholesale trading and manufacturing accounted for a further 15.2% of jobs. Other major sectors include health services (9.1% of jobs), education and training (6.0%) and public administration (8.0%).

The total number of jobs increased over the 2006 to 2011 period due to growth in the hospitality, construction and wholesale trade sectors. It is difficult to understand if this trend continued over the past five years.

Table 7 Employment Characteristics, 2011³²

Characteristic	Shire of Corrigin	Regional Western Australia	Perth
Average Hours Worked (per week)	37.8	41.9	34.7
Public Sector Employment	14.3%	13.7%	16.4%
Average Age of Worker	45.3	41.4	40.0
Tertiary Qualified	11.3%	15.0%	27.8%
Certificate and Diploma Qualified	30.5%	38.8%	31.8%
Working from Home	17.0%	6.0%	3.8%

³⁰ Realcommercial.com.au & RP Data

³¹ Wheatbelt Development Commission (2014) Wheatbelt South Sub Regional Economic Strategy, prepared by RPS.

³² ABS (2012) Census of Population and Housing, Australian Bureau of Statistics, Canberra

2.5 Tourism

2.5.1 Visitation Levels

- **Visitation across the wider region contributes more than \$600 million per annum to local businesses. With the wider Corrigin area, visitation contributes approximately \$60 million per annum and has increased 71% over the past decade.**
- **Self-drive tourists are the most significant market segment, with a large portion of these including caravanning and camping visitors which is a fast growing segment across Australia.**
- **Significant passing traffic volumes at approximately 330,000 per annum combined with forecast growth in regional tourism presents significant opportunities for the Corrigin economy.**

The rural lifestyle and amenity of the natural and built environments of the Wheatbelt South sub-region provides significant 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. In addition to tourism, visitation to local economies from neighbouring residents and business visitors supports local business revenues and new business development opportunities.

The wider region possesses a diverse offering of tourism attractions and activities, including woodlands and nature reserves, lake systems, tracks and trails, shows and sporting events and adventure sports. Wave Rock is the major tourism icon for the wider area and by far the most popular tourist attraction in the Wheatbelt 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 (approximately 1-1.5 hours from Corrigin). Wave Rock is estimated to attract over 140,000 visitors per year³³.

The wider region is part of the *Golden Outback* tourism region. According to Tourism Research Australia, visitors in this region during 2015 spend an estimated \$629 million in local economies. This supported more than 1,000 tourism businesses.

At a local level, data is available for the *Brookton Statistical Area Level 2* region which includes the local government areas of Corrigin, Brookton, Pingelly and Wandering. During the year-to-September 2016, there were an average of 585 visitors per day in this region which represents an increase of 71.0% from 2006 levels. Based on average spending levels across the *Golden Outback*, visitation during this 12 month period was estimated to deliver approximately \$60.9 million of expenditure to local businesses, with overnight domestic visitors accounting for 53.0% of this expenditure³⁴.

The region's visitor profile is characterised by the dominance of self-drive day visitors who are mainly engaged in social activities (including dining, events, sightseeing, spending time with friends and families). Overnight visitors are mainly from the *Experience Perth* tourism region and the majority of international visitors (96.0%) organised their trip through tour operators³⁵.

³³ Wheatbelt Development Commission (2014) Wheatbelt South Sub Regional Economic Strategy, prepared by RPS.

³⁴ TRA (2016) Online Data Sets NVS and IVS, Tourism Research Australia, Canberra

³⁵ TRA (2016) Online Data Sets NVS and IVS, Tourism Research Australia, Canberra

A large number of visitors to the wider region travel along Brookton Highway through Corrigin which presents an opportunity to increase business revenue and support new businesses. According to Main Roads WA, traffic along the Brookton Highway has increased by approximately 20% to 25% over the past five years³⁶.

The older populations, referred to as 'Grey Nomads', represent a growing demand for tourism related activities in the wider region, with its safe, rural lifestyle proving popular for this market segment. Many caravan parks are reliant on this market segment. Across Australia, domestic trips and nights by caravan and camping visitors increased by 9% and 16% year-on-year respectively during 2016³⁷. These cohorts supported revenues of \$1.8 billion across accommodation establishments³⁸. Meanwhile, across Australia, 7.1 million Australians were estimated to have stayed in a caravan park or camping ground in the past two years³⁹.

Looking forward, there is significant growth in visitation forecast for regional Western Australia. According to Tourism Research Australia, overnight visitation in regional Western Australia is expected to increase by 46.0% between 2014/15 and 2024/25⁴⁰.

2.5.2 Visitor Attractions

- **Overall, Corrigin has a diversity of attractions for stopover visitors. There are however limited attractions for overnight visitation, with no major events planned for the area besides the Corrigin Agricultural Show.**
- **There is no consistent brand for Corrigin and the existing 'windmill' brand no longer appears appropriate for the town given the removal of many windmills over previous decades.**
- **There is a perception that passing traffic is not aware of local businesses such as cafes, supermarkets, etc.**

Corrigin attracts visitors due to its central location along Brookton Highway and its seasonal wildflowers, shopping options, regional businesses and historic attractions, amongst others.

Established in 1974, the Dog Cemetery is perhaps the most recognisable attraction in the Shire. This unique cemetery is located approximately 1km from the townsite and regularly attracts stopover visitors. There is however a perception that the attraction does not translate into increased business activity in Corrigin.

Corrigin is home to the Pioneer Museum which has a large collection of tools and restored farm machinery, including tractors in working order. There is a blacksmiths shop, one room school, shearing shed, old district photographs, clothing and other pioneer memorabilia. A Pioneer Memorial Wall at the entrance to the Museum commemorates early settlers.

A scenic lookout has been developed in the townsite. The RSL Lookout and Scenic Lookout Drive provide opportunities for viewing the townsite, salmon gums, wheatfields and bush reserves.

³⁶ MRWA (2017) <<https://www.mainroads.wa.gov.au/OurRoads/Facts/TrafficData/Pages/default.aspx>> [accessed June 6, 2017]

³⁷ CIAA (2017) Caravan and Camping State of Industry, Caravan Industry Association of Australia

³⁸ Ibid.

³⁹ CIAA (2017) Caravanning and Camping Consumer Demand Report, Caravan Industry Association of Australia

⁴⁰ TRA (2017) <<https://www.tra.gov.au/Research/View-all-publications/All-Publications/Forecast-reports/state-tourism-forecasts-2016>> [accessed June 6, 2017]

Like most rural areas, Corrigin experiences some beautiful sights during the wildflower season, which is usually in September / October every year. The Corrigin Wildflower Drive starts opposite the Dog Cemetery, 5km west on the Brookton Highway and takes you on a well maintained gravel track to the Scenic Lookout, which overlooks the townsite and wheatbins.

Located 20kms from town, Gorge Rock is a natural rock pool which was once the local swimming hole (before the Olympic pool was constructed in town). A walk to the top offers spectacular panoramic views of the Corrigin countryside and the area provides a good rest stop for travellers with parking and picnic facilities.

Corrigin is also home to an adventure playground and picnic and ablution facilities for stopover visitors. The Roadhouse is also a popular stopover for passing traffic.

Corrigin's local attractions are complemented by a range of facilities in the town, including the Corrigin Windmill Motel and Corrigin Caravan Park, café and dining options, pharmacy, two supermarkets and newsagency.

There are however a number of challenges and barriers to attracting visitors. These include:

- **An unknown tourism brand**, with Corrigin perceived to be known largely for 'Dog Cemetery' and, to a lesser degree, previous events and wildflowers⁴¹;
- **Limited promotion activities** such as limited signage to highlight reasons for passing traffic to stopover in the town and limited marketing of Corrigin through regional tourism initiatives (neighbouring regions have been more active in terms of online marketing, events development and visitor services availability);
- **Limited regional and local events** have been held or are planned for the coming years in Corrigin; and
- **Limited online presence**, especially of local retail businesses and tourism services, with the local authority and Central Wheatbelt Visitor Centre the two main websites with information available.

⁴¹ Branding also includes 'windmill town'

3.0 Regional Influences

Regions are increasingly confronted with changing regional and global trends shaping the economic and environmental landscape. These trends are of particular importance to the Shire of Corrigin's future economic development given technology changes historically have had such a significant impact on the region's development over the past five decades. This section therefore outlines several prominent current and emerging national and global trends, with specific opportunities and challenges expanded upon in subsequent sections.

3.1 Megatrends

3.1.1 Digital Age

Technology has played a central role in the globalisation of markets by increasing the reach and speed of communication and reducing costs. It has in turn facilitated the flow of goods, capital, people and information across borders, with profound implications for life and business. Central to this is expanded telecommunications capacity and new communication mediums which are providing new economic, social and community benefits and opportunities to regional areas, including:

- More reliable base telecommunications;
- Online retail and shopping;
- Virtual education;
- Online entertainment, music and movies;
- Tele-health;
- Telecommuting and virtual work opportunities; and
- E-commerce and web-based business activity.

The Internet has caused a remarkable expansion in digital technology over the past two decades and this expansion is likely to continue into the distant future due to exponential growth in computing power and data volumes historically observed. Harnessing the virtual world has become important to all facets of society, offering a wealth of knowledge and data instantly. In addition to this, the breakdown of traditional boundaries around countries, companies, governments and professions has led to the development of horizontal and flexible networks driven by connectivity and technology. Sectors that can take advantage of this are likely to expand significantly in the future, as the peer-to-peer economy develops globally.

In the agricultural sector, digital technology and automated machinery is being used to enhance productivity, from the use of phone apps controlling processes to automated farms and food processing operations. For the region to capture these opportunities, it needs to have access to reliable communications technology and a large skilled workforce, and also remain cost competitive.

Corrigin has some way to go in the relation to technological readiness. The local government area has been ranked 450 out of 563 LGAs across Australia in terms of technological readiness, mainly due to low levels of employment in technology related industries and comparatively poor broadband coverage⁴².

⁴² RAI (2017) Insight Australia's Regional Competitiveness Index, Regional Australia Institute

Previous studies have shown that the economic and social benefits of improved digital telecommunications infrastructure can be significant, flowing through to health and wellbeing, education outcomes, business development and improved productivity. The key findings have been summarised below.

- **Improved Business Performance:** Access to better quality internet networks has been found to enable businesses to save time, costs and improve the quality of their goods and services. Research has shown that improved access to mobile broadband has led to an average cost saving of 1.4% and increased sales by an average 1.1%⁴³.
- **Improved Attraction and Retention of Skilled Workers:** Better quality mobile networks and internet access has been found to enable access to support, networking and professional development opportunities that help address professional isolation and disconnection and result in better retention of professional workers⁴⁴.
- **Reduced Sense of Isolation:** Lifestyle opportunities that are provided by better access to high speed internet with improved reliability have been found to be associated with improved opportunity for communication and connection with family and friends, access to entertainment, online shopping and the flow of information and news which are associated with reduced sense of isolation⁴⁵.
- **Improved Education Outcomes:** Access to broadband and quality internet has been found to enable distance learning, expand access to courses that are not currently available at schools, enhance education opportunities for students with different needs and abilities that lead to better educational outcomes measured through higher educational attainment and better test results and higher completion rate⁴⁶. Additionally research has indicated that access to better quality internet at relatively lower cost is enhancing the quality and effectiveness of delivery of education for teachers through enabling resource sharing, more interactive class room, participating in professional development and access to networking and support⁴⁷.

In addition to above, an overarching study of the benefits of high speed internet access for Australian households has quantified the benefits to household budgets. The key impacts include:

- **Improved communications** (estimated benefit of \$74 per household) through improved access to reliable telephone calls, social media and video calls;
- **Adoption of e-commerce** (estimated benefit of \$565 per household), with potential benefits including avoided travel and increase choice;
- **Access to e-health, e-education and e-government services** (estimated benefit of \$217 per household) due to travel savings from access to online services; and
- **Adoption of telework** (estimated benefit \$253), with a significant benefit derived from flexibility of work arrangements and subsequent less need for travel to work.

⁴³ ACMA (2014) The Economic Impact of mobile Broadband on the Australian Economy 2006-2013, Australian Communication and Media Authority

⁴⁴ Herrington A & Herrington J, (2006) Using the Internet for Professional Development: The Experience of Rural and Remote Professionals, Annual Conference for the Australian Society for Computers in Learning in Tertiary Education, Sydney

⁴⁵ KPMG (2015) Gen NBN: Understanding Australia's Most Connected Generation, KPMG

⁴⁶ Davidson, C. & Santorelli, M. (2010) The Impact of Broadband on Education, for U.S Chamber of Commerce

⁴⁷ Productivity Commission (2015), Public Safety Mobile Broadband, Productivity Commission, Canberra

Impact of the NBN in Australia's South West

The South West is located in the south-western corner of Australia and covers an area of nearly 24,000 square kilometres. At the time of undertaking this assessment the South West region, it was underserved in terms of internet access⁴⁸. The National Broadband Network roll-out however has been found to have increased internet speeds, increased internet reliability and reduced internet costs. As result, the positive impacts of the initiative were found to include:

- Increased revenue in the order of 21%;
- Increased productivity in the order of 6.3%;
- Increased employment in the order of 5%;
- Diversification of business activities; and
- Improved ability to attract new residents, workers and investment in the region.

The study also identified a range of positive social impacts, including:

- Reduced social isolation through improved connectivity and communication;
- Improved education attainment, with greater access to online training and materials;
- Improved health outcomes due to increased access to health care services or specialist care through online mediums; and
- Coordination of organisation and volunteers including emergency services.

3.1.2 Global Food Market

The world's population is expected to increase by more than 25% to 9.1 billion by 2050⁴⁹. At the same time, the world will have to produce more food and fibre with a smaller rural workforce and less arable land, adopt more sustainable methods to adapt to climate change, and adapt to changing food preferences. The production of biofuels will have an additional impact, competing against food products for land and resources.

The UN Food and Agriculture Organisation predicts that feeding a world population of 9.1 billion in 2050 would require raising overall food production by 60% between 2007 and 2050⁵⁰. Production in developing countries would need to double over this period. This implies significant increases in several key commodities, including 'cereals' which is a key commodity in the Shire.

⁴⁸ SWDC (2011) Impact Assessment of National Broadband Network on the South West Region – Western Australia, Prepared by AEC Group, South West Development Commission, Bunbury

⁴⁹ FAO (2012) World agriculture towards 2030/2050 :The 2012 Revision, Food and Agriculture Organisation of the United Nations <<http://www.fao.org/docrep/016/ap106e/ap106e.pdf>>

⁵⁰ Ibid.

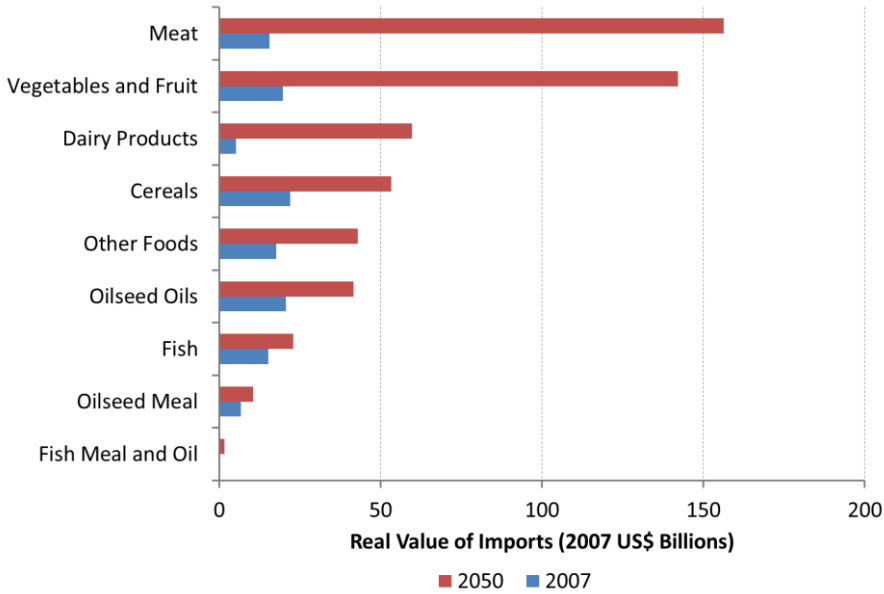


Figure 5 Projected Agriculture Consumption by Region⁵¹

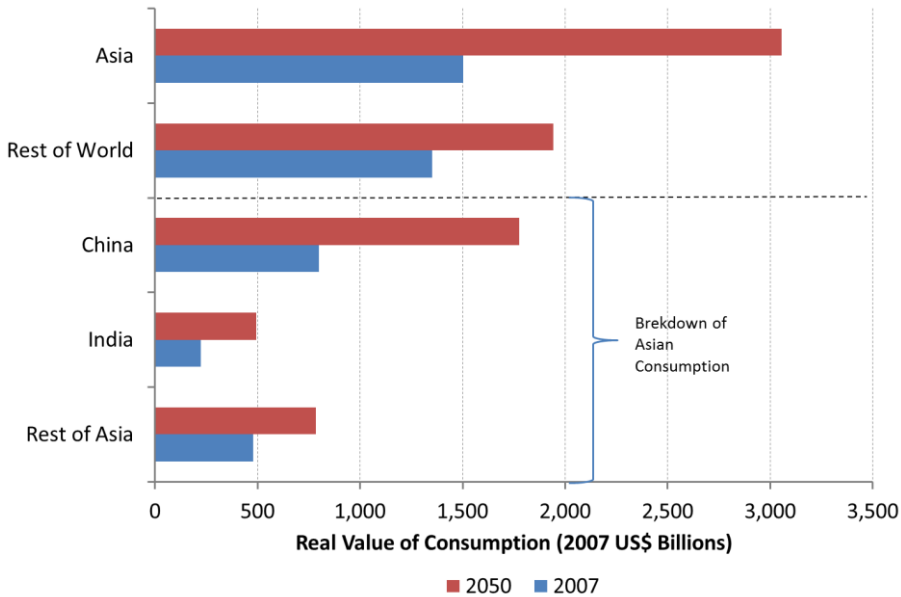


Figure 6 Projected Agriculture Consumption by Region⁵²

Further, CSIRO has undertaken research of the emergence of the “meganiche”. These meganiches are however beyond our traditional idea of a niche, with markets of 50-300 million people⁵³. This provides

⁵¹ FAO (2012) World agriculture towards 2030/2050 :The 2012 Revision, Food and Agriculture Organisation of the United Nations <<http://www.fao.org/docrep/016/ap106e/ap106e.pdf>>

⁵² Ibid.

⁵³ CSIRO (2014) Make for Asia: The emerging Asian middle class and opportunities for Australian manufacturing, Telstra & CSIRO <<http://www.telstra.com.au/business-enterprise/download/document/telstra-business-make-for-asia-whitepaper.pdf>>

opportunities for regions which can provide opportunities for the sophisticated and agile producer who can offer a product from a well-regulated and clean environment with a focus on individualised service to create a ‘fit-for-specific-purpose’ product.

Meanwhile, the world’s population with a preference for foreign food is estimated to grow from 158 million in 2009 to 970 million in 2030, with much of this growth from Asia⁵⁴.

3.1.3 Urbanisation

Australia has changed from the majority of residents living in rural areas, to the majority of residents living in capital cities over the past hundred years, mirroring global trends. Since 1971 the number of people living in capital cities or major centres has increased steadily, while the growth in the number of people living in the rest of Australia has been stagnant, as can be seen in the chart below.

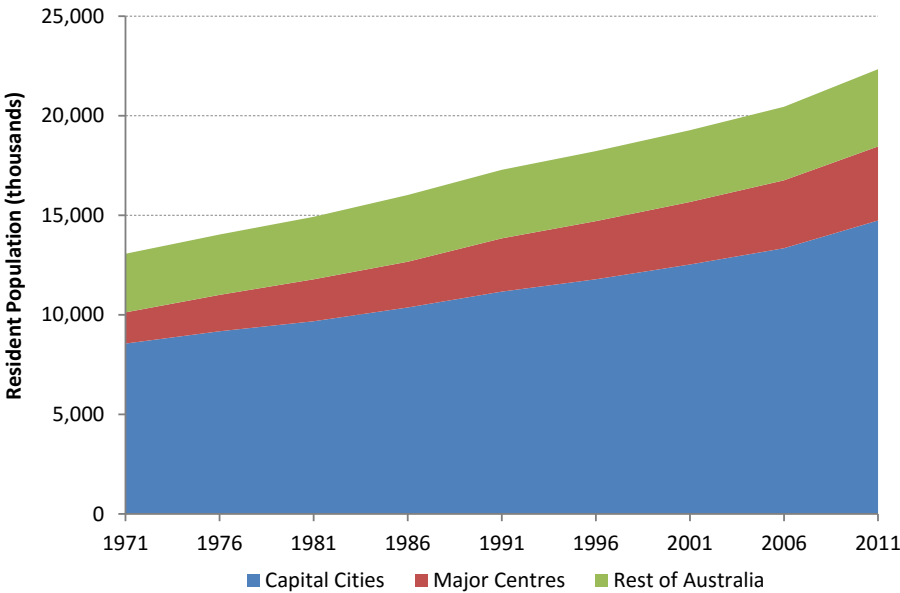


Figure 7 Population Residing in Australia by Remoteness, 1971 to 2011

In Australia, the outmigration of young people from regional areas is detrimental to regional development, and is a trend that has been developing over a long period of time. International migration has been a significant contributor to the sustainable existence of remote communities, and this can be seen through the decrease in the population born in Australia in rural towns. It is likely that the focus of retention strategies in the future are going to focus less on young people, and more on people in the 30 to 40 year age group who are looking to form families. These retention strategies need to be incorporated alongside policies that attract international migrants to the area⁵⁵.

For non-coastal towns, persistent unemployment, particularly for youth, is a major factor contributing to outmigration of youth in small regional towns, encouraging them to move to regional centres, which have a higher diversity of industry, and can provide improved social services more effectively than small towns.

⁵⁴ FAO (2012) World agriculture towards 2030/2050 :The 2012 Revision, Food and Agriculture Organisation of the United Nations <<http://www.fao.org/docrep/016/ap106e/ap106e.pdf>>

⁵⁵ Regional Australia Institute (2015) Population Dynamics in Regional Australia, RAI, Canberra

3.1.4 Population Ageing

The population of Australia is ageing. Approximately 3 million people in Australia were aged 65 years and over in 2011 representing over one in eight Australians⁵⁶. This was an increase of 28% over the last decade with an annual average growth rate of 2.5%. Looking forward, the number of people aged 65 years and over is projected to increase by 83.6% over the next two decades with an annual average growth rate of 3.1%. This is significantly faster than in the past, representing acceleration in the ageing of Australia’s population. By 2050, the number of people aged 65 and over is expected to reach one in five people, presenting one of the greatest challenges for policy makers, industry and the community.

Key challenges have been noted below.

- **Housing provision:** Aged people often require more affordable housing as well as housing more appropriate to their needs, such as smaller, easy-to-maintain housing close to services.
- **Infrastructure:** A decreasing level of mobility requires appropriate transport infrastructure and services.
- **Aged care services:** Aged residents require accessible care services.
- **Population retention:** Elderly residents in regional areas typically move to regions with better care and support services which impacts on vital volunteering work.

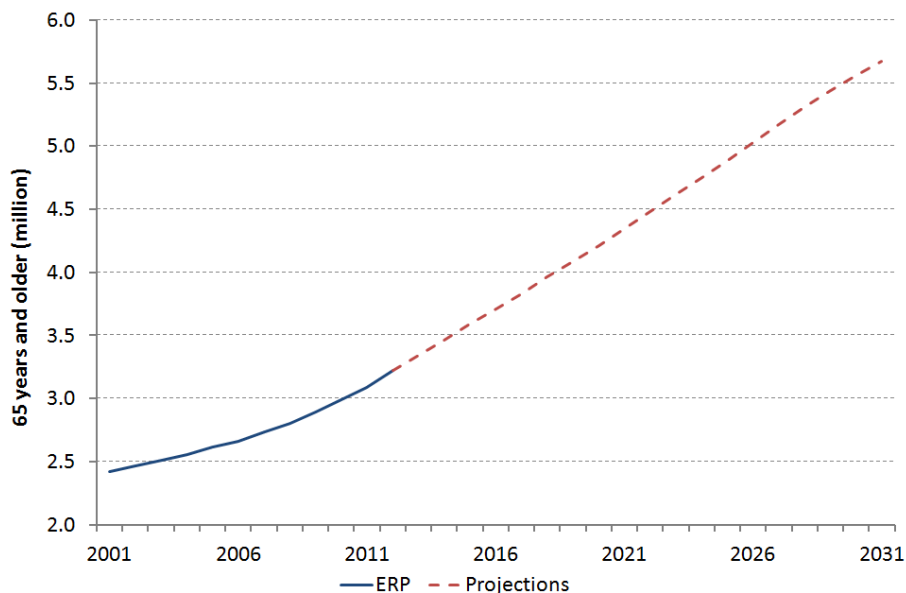


Figure 8 Historical and Projected Population, 65 Years and Over, Australia, 2001 to 2031⁵⁷

Traditionally seen as a burden on services such as health, an ageing population can however provide business opportunities and economic growth to regional areas. Industries can develop around health and aged care services as well as broader lifestyle services for elderly residents.

⁵⁶ Australian Government (2010) Intergenerational Report 2010, Australian Government, Canberra and ABS (2012) Estimated Residential Population, Cat No 3235.0 Australian Bureau of Statistics, Canberra

⁵⁷ ABS (2008), Population Projections, Australia, 2006 to 2101, Cat No 3222.0, Australian Bureau of Statistics, Canberra

3.2 Industry Outlook

3.2.1 Employment Forecasts

The Department of Employment prepares five year forecasts of employment growth on a regular basis which capture the short term impact these regional influences are having on the industry make up within Australia. Some of the key trends of relevance to the region include:

- **Declining mining employment**, with the number of workers directly employed in the mining sector expected to decline by 14.1% over the next five years to just 193,800 which is lower than all industry sectors apart from utilities;
- **Declining manufacturing sector**, with significant declines in car manufacturing and textile manufacturing offsetting expected increases in food product manufacturing (up 5,200 jobs) and computer and electrical goods manufacturing;
- **Health service increases**, with more than 250,000 additional jobs in the health and social services sector forecast, including a 19.8% growth in social services and 9.0% growth in residential care services;
- **Professional services growth**, with the fastest growth in engineering and technical services (19.5%) followed by computer design (17.3%);
- **Hospitality sector growth**, with increasing spending expected to see growth of 98,800 jobs in this sector (up 10.0%), especially for cafes and dining options (up 14.9%);
- **Retail trade increases**, with growth of 8.4% broadly in line with worker growth, but especially high growth in non-store retailing (37.5%); and
- **Education sector growth**, with growth expected to outpace domestic requirements (at 13.0%) based on forecast increases in overseas student numbers.

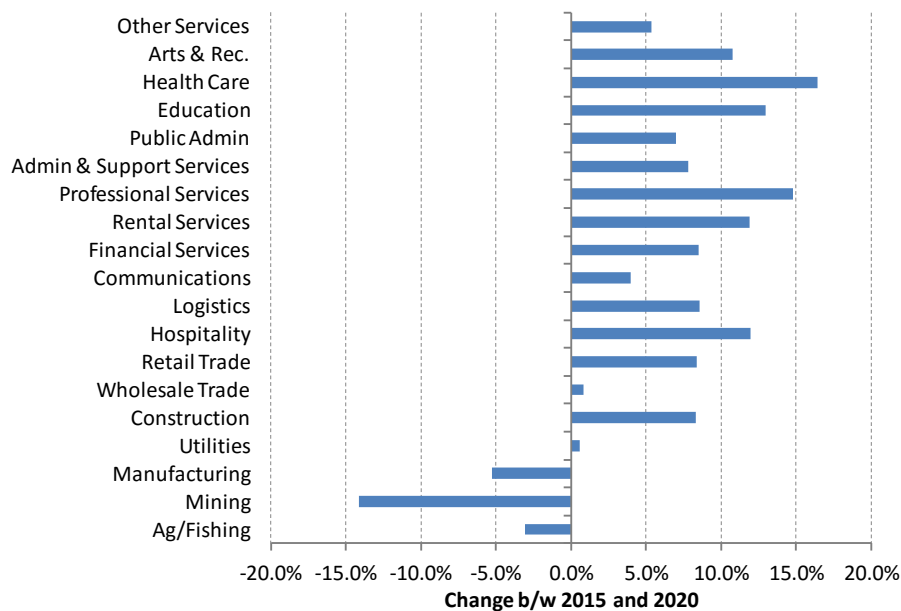


Figure 9 Employment Projections, Australia, 2015 to 2020

3.2.2 Looking Further Ahead

Deloitte regularly releases research endeavouring to predict future growth opportunities in Australia. Their latest research suggests that growth in the next wave will come from gas, agribusiness, tourism, international education and wealth management⁵⁸. These are areas where Australia already has a strong comparative advantage.

However, looking further forward, the picture is not as clear. Deloitte has identified 19 growth areas, of which the following are directly relevant the region:

- **ICT** – devices connect to the Internet and the cloud, and spin off data that can be used to optimise everything from fridges to our national transport and power networks;
- **Trade Financing** – Deloitte Access Economics estimates that Australia's trade ratio will rise to 45% by 2015, before reaching a resource export–assisted 60% by 2025;
- **Medical Research** – Australia is well positioned to export its capabilities through partnerships, education and mentoring with peers in Asia, where ageing and neurological disorders are recognised as a significant and fast-growing threat to public health;
- **Community and Personal Care** – Australians are living busier lives, meaning the future for time-saving services is particularly bright;
- **Retirement Living and Leisure** – the coming wave of retirements among baby boomers will be large, and will come with more ambitious expectations of their retirement years than previous generations;
- **Reskilling an Ageing Workforce** – growing numbers of older Australians are extending their careers by choosing a different role or a new industry;
- **Residential Aged Care** – Just as the baby boomers changed the nature of Australia's schools in the 1950s and 60s, and then our workforce in the decades that followed, they will create a wave of change through the aged care sector;
- **Preventative Health and Wellness** – we're living longer but we also want to keep living better, and that tension will generate billions of dollars in opportunities; and
- **Private Schooling** – non-government schools educated one in every four students three decades ago; the ratio today is more than one in three.

3.3 Impact on Corrigin

3.3.1 Role of Regional Influences

Each of the major trends detailed above will influence and shape the future of the Shire of Corrigin. The Shire's capacity to position itself to benefit from these trends are influenced by a broad range of local advantages that need to be enhanced and challenges and limitations that need to be overcome. The ability of the Shire and other stakeholders to take advantage of these opportunities will likely be a significant factor in whether the area can be successful economically in the future.

⁵⁸ Deloitte (2014) Positioning for Prosperity, Deloitte Access Economics, Sydney

RPS Group has assessed the relevance to the factors noted above to the region's economy and communities and identified the broad advantages and challenges, with specific opportunities and challenges expanded upon in subsequent sections.

Table 8 Regional Influence and Local Assessment

Driver	Relevance to Region	Challenges	Advantages
Digital Age	High	<ul style="list-style-type: none"> Poor access to broadband network (NBN is proposed for future construction). Shortage of skilled labour force. Limited presence of ICT and technology related businesses. Limited online presence of local businesses. 	<ul style="list-style-type: none"> Central location of Corrigin and access to essential community services in health and education can be expanded through other rural and remote towns in the region. Current usage of technology in key sectors such as broad-acre agriculture.
Global Food Market	High	<ul style="list-style-type: none"> Limited diversity in agriculture production. Limited light serviced industrial land to attract new business. Limited access to required labour pool. Rainfall and soil characteristics. 	<ul style="list-style-type: none"> Established agriculture industry. Relatively affordable land. Presence of agriculture services and businesses in Corrigin.
Ageing Population	High	<ul style="list-style-type: none"> Shortage of skilled workforce. Limited non-government age care service providers and home care services. 	<ul style="list-style-type: none"> Corrigin as a destination of choice for retiree due to access to essential health and community services. Recent investment in community facilities. Availability of serviced residential land that can be leveraged for workers housing to attract skilled workforce and the construction of age appropriate housing. Proposed investment in independent living unit accommodation.
Urbanisation	Medium	<ul style="list-style-type: none"> Limited housing options and diversity to attract and retain population. Limited education and employment opportunities. 	<ul style="list-style-type: none"> Recreation services and sporting clubs and competitions. Population services. Affordability.

3.3.2 Key Impacts

Overall, core areas of opportunity and disruption have been identified for Corrigin and the wider region.

- High quality food production:** Demand for agricultural produce is a key outcome of increased urbanisation as more food is demanded by a growing population of net food buyers. Additionally, agriculture production is challenged by large scale conversion of farm land to urban centres and increased water usage, placing an increased strain on food production capabilities. Corrigin's existing comparative advantages in agriculture position it well to meet the needs of this growing cohort. The region however needs to attract alternative and more diverse agriculture production, including livestock.

- **International tourism:** The rise of China and India as global powerhouses is leading to a shift in wealth from the west to the east. A wealthier Asian middle class will have the ability to travel further and stay for longer in a vast array of destinations. The Wheatbelt region already possesses an incomparable breadth of natural, environmental and tourism assets across an environmentally diverse region. The region will need to better take advantage of increased visitation to Perth over coming decades.
- **Population retention and attraction:** The challenge for regional communities like Corrigin is to continue to create liveable spaces and communities through the provision of affordable and diverse housing, high quality public amenity and community infrastructure, easy access to quality health and education services and appropriate retail, entertainment and recreation choice to reverse the population loss to bigger towns and cities. Improvements in community services and amenity needs to be matched by the creation of employment opportunities across a diverse range of industries. A core opportunity area for population attraction is 'Corrigin as affordable retirement destination'. This will require:
 - » Positioning itself as a destination of choice for retirees seeking affordable housing and an aged friendly lifestyle;
 - » Developing an aged care industry through the creation and development of high quality aged housing, transport infrastructure and aged care services;
 - » Supporting the local tourism industry by developing niche-market aged friendly tourism initiatives; and
 - » Engaging the elderly in the community to take on leadership positions and support community projects and initiatives.

4.0 Capacity for Development

4.1 Corrigin Advantages and Assets

Fundamental to the development of Shire is harnessing the capacity of the area's physical, social, economic and environmental strengths. The challenge is to successfully link and leverage these assets and competitive advantages, ensuring benefits are realised and returns to the community and business are maximised.

The following table highlights the key advantages and positive trends based on previous analysis.

Table 9 Key Advantages and Positive Trends

Key Advantages	Key Positive Trends
<ul style="list-style-type: none"> ▪ Recent investment in community facilities such as the recreation centre which is home to one of the region's only hydrotherapy pools. ▪ Proximity to undeveloped mineral deposits such as ore deposits which are under consideration for investment. ▪ Proximity to internationally recognised tourism attraction such as Wave Rock and range of nature based tourism attraction. ▪ Local amenities such as sporting and recreation facilities, health services, supermarkets and cafés. ▪ Centrality within Wheatbelt South and location along Brookton Highway. ▪ Availability of residential land at Granite Rise and relatively affordable properties. ▪ Underutilised airstrip and race track which could support businesses and events. ▪ Presence of agriculture services/businesses such as dealerships which are increasingly closing in other towns in the region. 	<ul style="list-style-type: none"> ▪ Increasing visitation⁵⁹ equivalent to 50-70% over the past decade in the region increased through-traffic equivalent to 15-20% over the past five years, especially due to day trips⁶⁰ ▪ Increasing business presence, with the number of registered employing businesses found to have increased by eight between 2012 and 2015⁶¹ ▪ Increasing incomes, with reportable incomes to the ATO increasing year-on-year to in excess of \$58 million as of 2014/15 (up from \$24 million in 2010/11), including increasing numbers of income earners (up 11.8%) and increasing median incomes (to levels 19% above the Wheatbelt median)⁶² ▪ Increasing building activity, with the number of dwellings approved for construction increasing to 10 in 2015/16⁶³

4.2 Corrigin Challenges and Barriers

The population, demographic, economic and industry analysis of the Shire of Corrigin has also identified key challenges and barriers to economic development in the Shire. The key current and emerging challenges and barriers in the Shire have been summarised in the table over the page.

⁵⁹ includes Brookton, Pingelly, Wandering and Corrigin local authorities)

⁶⁰ TRA (2016) Online Data Sets NVS and IVS, Tourism Research Australia, Canberra & Main Road (2017),

⁶¹ ABS (2017) Counts of Australian Businesses including Entries and Exits, Cat No 8165, Australian Bureau of Statistics, Canberra

⁶² ABS (2017) Estimates of Personal Income for Small Area, Australia. Cat No 6524.0.55.002 , Australian Bureau of Statistics, Canberra

⁶³ ABS2 (2017) Building Approvals , Australia Cat No 8731, Australian Bureau of Statistics

Table 10 Key Challenges and Barrier

Key Challenges	Key Barriers
<ul style="list-style-type: none"> ▪ Increased unemployment, with levels of unemployment estimated to have increased from 4.1% to 6.0% over the past five years leading to an increase of welfare dependency of about 90% between 2012 and 2016; ▪ Population declines, with the Shire of Corrigin's population declining year-on-year for the past decade, with sharper declines recorded in the Corrigin townsites equivalent to 12.5% over the past decade (or 10 persons per annum); ▪ Youth and adult retention, with the number of residents aged 15-44 declining by 40% over the past decade ▪ Increasing unoccupied housing stock equivalent to approximately 30% of the Shire of Corrigin's housing stock (circa 180 empty dwellings); ▪ High cost of construction, with residential dwellings costing on average 25% to 35% more to build than within metropolitan Perth; ▪ Disengaged youth, with 15-19 years-olds found to be 20% to 25% less likely to be in full-time study or employment compared to Western Australian averages. 	<ul style="list-style-type: none"> ▪ Availability of commercial and industrial property, with currently zero commercial, service commercial or industrial lots or properties currently on the market for lease or purchase in Corrigin ; ▪ Unknown tourism brand, with Corrigin perceived to be known largely for 'Dog Cemetery' and, to a lesser degree, previous events and wildflower ▪ Limited promotion activities such as limited signage to highlight reasons for passing traffic to stopover in the town and limited marketing of Corrigin through regional tourism initiatives. ▪ Limited online presence, especially of local retail businesses and tourism services, with the local authority and Central Wheatbelt Visitor Centre the two main websites with information available. ▪ No residential rental stock, with zero properties found to be available for rent. ▪ Access to labour, especially appropriately skilled labour. ▪ No private aged care providers, with no presence of not-for-profit or private home care or age-appropriate accommodation. ▪ Limited diversity of employment opportunities, with employment largely concentrated in broad-acre agriculture and limited diversity of production ▪ Access to broadband, with the Shire of Corrigin having a broadband rating of 2.7 out of 10 according to the Department of Communications.

5.0 Strategic Context

This section has explored the priorities of the Shire of Corrigin and local community and business groups. The section also includes a summary of broader regional roles evidenced across Australia in the economic development field.

5.1 Stakeholders Priorities

RPS Group engaged with the Shire of Corrigin and the Working Corrigin to capture the communities' aspiration, potential opportunities, strengths and broader local knowledge of the area. A summary of key areas of focus has been provided below.

- **Corrigin Airport:** The Shire-owned airstrip is located near the Corrigin townsite. Currently the airstrip accommodates emergency services, recreation flying and touch and go landing from flight school/s. It has emergency fuel and can accommodate additional facilities such as hangers. The airport has potential for accommodating recreational businesses and training activities, operating as an alternate emergency landing airport and for small scale maintenance. The airport specifically has the ability to host charter flights and training (e.g. drone licensing) with modest improvements.
- **Aged Care Services:** The need for a dedicated non-government home care provider has been indicated in the initial consultation. It was noted that home care services (HACC) are currently provided by a staff member of the hospital and aged care is provided within six beds at the hospital and at Wogerlin House. Recently the Shire has received funding to deliver independent living units through the Wheatbelt South Aged Housing Alliance and as part of the initiative the Shire is expected to deliver approximately three units from 2018 onwards. It is recognised that aged care services are in demand and that Corrigin is perceived to have potential to be a hub for the towns to the east, north and south given its central location and existing services (e.g. hydrotherapy, allied health, hospital, pharmacy, clubs, supermarkets, etc.).
- **Granite Rise:** The Shire of Corrigin has developed 33 residential lots in the Corrigin townsite. One lot has been sold privately and a second lot has been sold to the Housing Authority. The availability of the serviced residential land is perceived as a great opportunity to attract businesses and workers.
- **Tourism Infrastructure:** Through the initial consultation, a number of tourism development priorities and challenges have been identified. Firstly, there was an identified need for tourism information services, with opportunities for the co-location of the facility with the museum, Rotary Park or potential co-location opportunity with the Community Resource Centre. This service could become a stopping point for private tours to Wave Rock. Secondly, Corrigin has been known for 'dog cemetery' and wild flowers and windmills but there is no clear brand or consistent promotion. Lastly, there is potential to re-locate the caravan park to better capture overnight visitation.

5.2 Government Priorities

The strategy is intended to be a high level advocacy and guiding document for the Shire of Corrigin and relevant stakeholders. It should build upon and align with the following strategies and prioritised focus areas.

- **Shire of Corrigin Corporate Business Plan 2016-2021** which recognises the need for the promotion of tourism within Corrigin and focusses on the promotion of overnight and short stay accommodation, local activities, and local and community events.
- **2020 Tourism Strategy (Western Australia)** which focusses on growing visitation to regional areas through supporting infrastructure, events, and improved caravan, camping and self-drive experiences;
- **Caravan and Camping Action Plan 2013- 2018** which focusses on the expansion and upgrading of facilities and infrastructure for self-drive holiday makers and the promotion of the application of online platforms for branding and marketing of caravan park operators.

-
- **Wheatbelt Regional Investment Blueprint** which focusses on tourism and the opportunities to deliver diversity and innovative businesses and industries within the region;
 - **Wheatbelt South Economic Development Strategy** which focusses on collaborative and coordinated approaches in marketing tourism assets and attractions and linking the destination, accommodation and eateries and events in the sub-region;
 - **Ageing in the Bush** which recognises that aged care services in regional Western Australia are under pressure and too often older people are leaving their homes and their communities to access such services.

6.0 Economic Opportunities

6.1 Approaches to Economic Development

Shifting the Shire of Corrigin's economy from "business as usual" towards a more preferred future requires the pursuit of a range of initiatives that create new jobs within established industries and within emerging (and new) industries, as well as the continued development of enabling infrastructure and services to support sustainable economic and social development and population growth.

There are generally four broad tasks that help achieve better economic outcomes, including:

- **Promotion** – of the area, local assets and opportunities;
- **Facilitation/Coordination** – of projects and industry or stakeholder collaboration;
- **Advocacy** – for policy change or key infrastructure investment; and
- **Investment** – such as the provision or development of services and information.

Given funding and financing constraints, the council is best placed to undertake promotion, facilitation and advocacy tasks. This however would include the presentation of investment proposals to the Shire of Corrigin and other stakeholders as required.

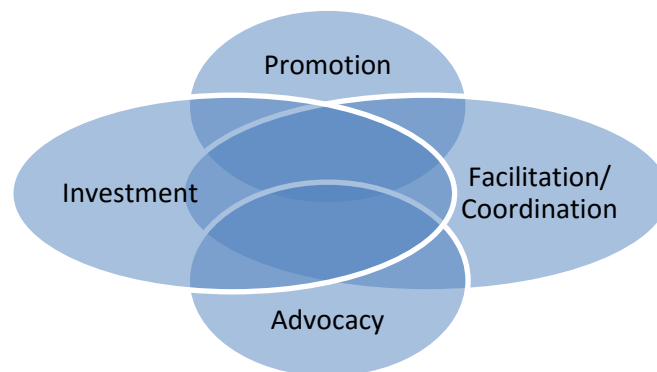


Figure 10 Economic Development Intervention

This model has informed the identification of potential focus areas in the following section.

6.2 Identifying Areas of Focus

The regional analysis and discussion of regional influences led to the identification of Corrigin's advantages and assets and the emerging opportunities that built on these, as well as a number of regional challenges and their implications for growth. Through this process, core areas of focus which are central to the future economic and social development of Corrigin have been identified.

Prioritising core areas of focus has required consideration of:

- **Member and stakeholder roles** historically and currently related to the area of focus;
- **Emerging strengths and opportunities** and their potential to be leveraged;
- **Barriers** to progressing with actions and projects that endeavour to take advantage of identified opportunities; and
- **Regional value** of pursuing actions identified with the area of focus.

As with any strategic exercise, RPS group endeavoured to identify several broad areas of focus for the strategy over the next ten years which aligns with the aforementioned tasks. Overall, this research has identified four priorities for consideration based on our desktop analysis, input from the Working Group and understanding of the capacity of the council to influence economic outcomes. In other words, we have identified four areas where we believe the Shire is best placed to focus its attention.

These priority core areas of focus are not an exhaustive list of the broader economic opportunities of the region over the next ten years and beyond. Instead, they reflect core areas of focus where efforts and action from the Shire would likely result in the greatest transformational effect and achievement of improved wellbeing across the region.

6.3 Recommended Focus Areas

The table below provides an overview of the main economic and tourism development focus areas.

Table 11 Economic and Tourism Development Focus Area

Focus Area	Aim	Rationale
Aged Care Services Attraction	Corrigin is a central location for health services and the region's ageing population	<ul style="list-style-type: none"> Corrigin is located in a rapidly ageing region Addresses lack of aged accommodation and services Leverages retail and health services Provides employment opportunities for youth and adults to stay in/move to Corrigin
Tourism Branding & Promotion	Corrigin is the main servicing centre for passing traffic on the Brookton Highway and is considered a tourism destination	<ul style="list-style-type: none"> Supports accommodation establishments Leverages existing, underutilised attractions Takes advantage of increasing passing traffic and regional visitation that uses Brookton Highway
Population & Business Attraction	Corrigin attracts downsizers, lifestyle residents and workers employed across the region	<ul style="list-style-type: none"> Availability of titled lots at Granite Rise which can be leveraged to attract permanent residents, workers and business owners Availability of transient accommodation to accommodate temporary workers Leverages retail and recreation amenities and central location in Wheatbelt South
Government & Regional Advocacy	Corrigin attracts a greater proportion of government investment and attention	<ul style="list-style-type: none"> Provides opportunities for external funding to support initiatives and infrastructure investments Provides Corrigin with 'a seat at the table' for region-wide initiatives Provides opportunities to establish partnerships and promote the activities of the working group, local businesses and Shire of Corrigin

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The logo consists of the letters 'RPS' in a white, bold, sans-serif font, centered within a dark blue rounded rectangular background.