



BELLINGEN
SHIRE COUNCIL

2022–2026

ECONOMIC DEVELOPMENT AND TOURISM PLAN





Acknowledgement of Country

Council acknowledges the traditional custodians of the land, the Gumbaynggirr people, who have cared for this land since time immemorial. We pay our respects to their elders, past, present and emerging, and commit ourselves to a future with reconciliation and renewal at its heart.

The Gumbaynggirr Community Vision...

A place where there is genuine respect for the land and the original people of this country. A place where the ancestors' way of holding country is recognised. A place where there is respect for custodial people who carry this tradition today and for Elders and the children of the future. A place where we all walk together, where we can all be here in harmony with the land and all life. The land around here has a great capacity to do that, to heal... in a way that's not separating.

EXECUTIVE SUMMARY

The Bellingen Shire local government area (LGA) is a special and unique place due to its natural environment, culture and lifestyle. These qualities make the Shire a highly sought-after location to live and visit. Protecting the environment, supporting the arts and maintaining strong social connections are important values of residents. For the Bellingen Shire to have a sustainable community long-term, more needs to be done to ensure businesses are supported and more local jobs are created especially for young people.

Bellingen Shire's economy has been underperforming over the last 5 to 10 years. Almost every industry, except for construction, is in decline. At a time when the NSW economy has been growing at about 2% per year, Bellingen Shire has been slowly shrinking and losing local jobs. Visitor numbers to the area have also been down in more recent years.

These negative impacts are felt most by local business owners. It also reduces the range of local products and services and reduces local employment opportunities available to residents. If left unaddressed, over time these conditions impact on liveability and make for a less sustainable community. Some of the key challenges that must be tackled to turn around the Shire's economic trajectory include providing more serviced industrial land, addressing specific issues within town centres and providing more affordable housing for residents.

Looking ahead, there are some exciting opportunities for the Shire. The recently announced Dorrigo Escarpment Great Walk and Arc Rainforest Centre is a \$56 million dollar project funded by the NSW Government that consists of a multi-day bush walk and visitor centre based in the Dorrigo National Park. This project will be a game-changer for the Shire and is estimated to attract an additional 200,000 visitors per year. The project will generate 280 jobs during the construction phase and a further 270 ongoing jobs when completed. Many investment opportunities will be created as a result of this new development.

The Economic Development and Tourism Plan has the following vision,

"By 2026, the Bellingen Shire will have town centres that are inviting to customers, productive for business owners, and provide more affordable housing for residents. Entrepreneurs will be encouraged to start businesses within the Shire and there will be increasing employment opportunities provided by the growing industry base. Visitors from a range of ages and levels of ability will be able to enjoy the environment and attractions. Artists and creatives in our community will be supported to generate a sustainable income from their work. Infrastructure will be planned to meet the demands of a growing residential and visitor population."

This vision is supported by 4 goals, 8 objectives and 43 prioritised actions. Included is a list of measures to track the performance of the local economy and Council's progress in delivering the plan.

Businesses within the Shire are passionate about their local community. They are also keen to work more closely with Council to improve local economic conditions for sustainable employment growth and a tourism industry that preserves the pristine natural environment. Working together we can ensure that the Bellingen Shire is not only a great place to live and visit, but also to start and grow a business.

Disclaimer This document has been prepared by NDP Economic Development in our capacity as advisors to Bellingen Shire Council in accordance with our Proposal dated 26 May 2021. The information, statements, statistics, material and commentary (together the "Information") used in this Report have been prepared by NDP from publicly available material, from information provided by Bellingen Shire Council and from discussions held with a range of community stakeholders. NDP has relied upon the accuracy, currency and completeness of the Information provided to it by Bellingen Shire Council and the community stakeholders and takes no responsibility for the accuracy, currency, reliability or correctness of the Information and acknowledges that changes in circumstances after the time of publication may impact on the accuracy of the Information. The Information may change without notice and NDP is not in any way liable for the accuracy of any information used or relied upon by a third party. NDP has provided this advice solely for the benefit of Bellingen Shire Council and disclaims all liability and responsibility (including arising from its negligence) to any other parties for any loss, damage, cost or expense incurred or arising out of any person using or relying upon the Information.

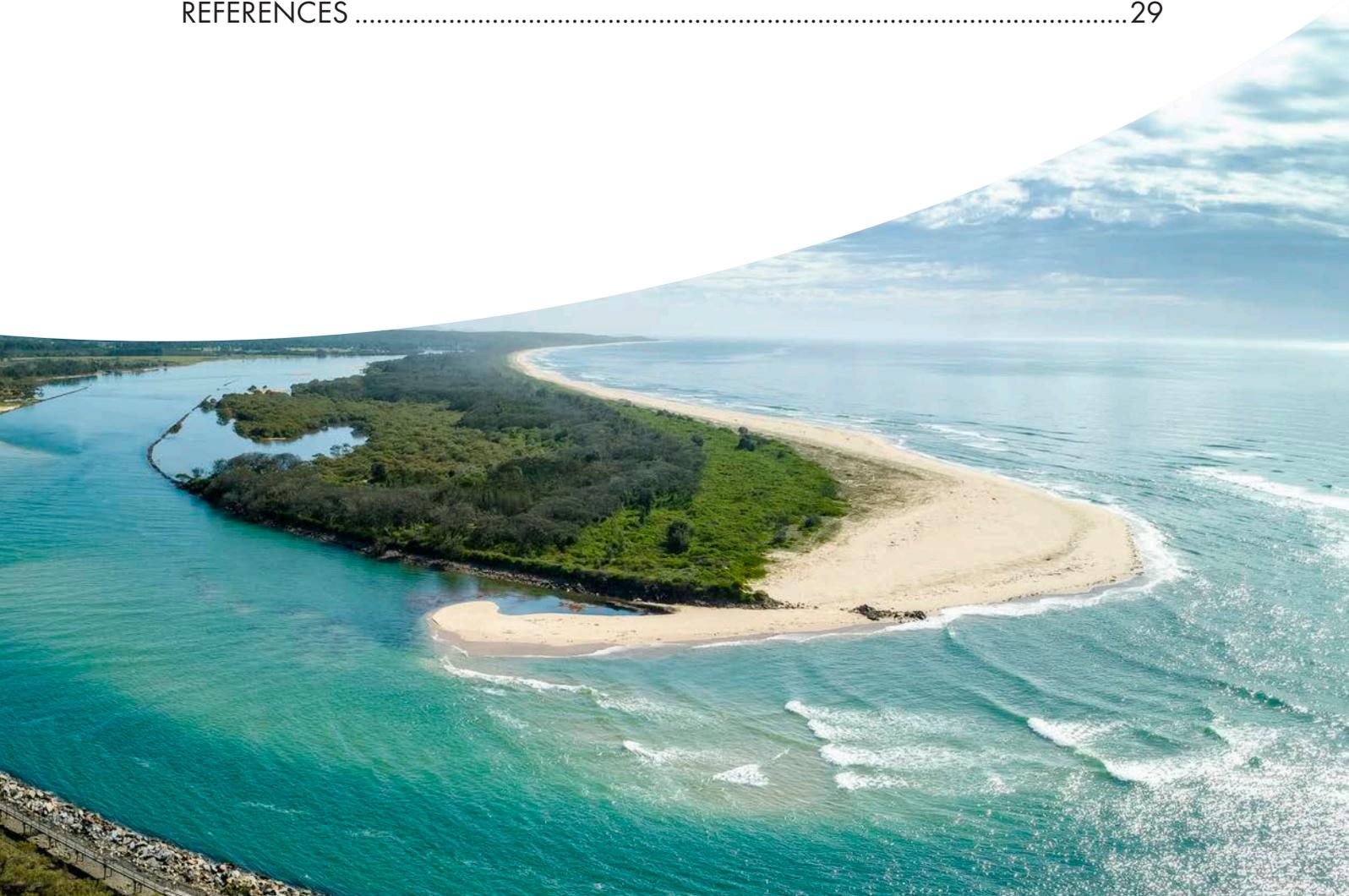
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PART 1 – PURPOSE OF THE PLAN

This section covers the aims of the plan, how it was prepared, defining economic development and the role of Council.

BACKGROUND

Bellingen Shire Council (“Council”) engaged NDP Economic Development (“NDP”) to assist in the preparation of the Bellingen Shire Economic Development and Tourism Plan (“EDTP” or “the Plan”). The EDTP has been prepared after consulting widely with business owners, community stakeholders, Council and other government agencies. This Plan seeks to reflect the values and aspirations of the Bellingen Shire community and articulate Council’s role in supporting a vibrant and diverse local economy now and into the future.

Given the nature of the Bellingen Shire’s economy, the Plan combines economic development and tourism. This is due to the important role visitors have in contributing towards existing local businesses, and in showcasing the LGA for investment attraction. In fact, many business owners first visited the area as tourists and decided to relocate their business due to the desirable lifestyle, environment and culture.

The EDTP is intentionally practical and concise. It will be used to guide the Council’s actions over the next four years and facilitate partnerships between Council and businesses, tourism operators, education providers and community groups. The document is easy-to-read so a broad range of stakeholders can quickly grasp the vision for business and tourism and support its successful implementation.

AIMS OF THE PLAN

There are four key aims of the EDTP:

1. **Tell the economic and tourism story for the Bellingen Shire LGA** – What are the growth areas? What are the major economic and demographic trends? What are the critical issues?
2. **Capture the local voice of the community** – What do businesses want? What are their major concerns? What are their aspirations for the future?
3. **Support sustainable growth of business, employment and tourism** – What are the big opportunities? What are the key actions? What are the policy areas for Council?
4. **Provide a practical roadmap and evaluation framework** – What does success look like? How do we get there? How are we tracking progress?

THE PROCESS

The process of preparing the plan involved four components:

1. **Statistical analysis** – This phase was concerned with answering the question, where are we now? It looked at the important economic and demographic trends occurring within the LGA.
2. **Strategic alignment** – This phase was concerned with reviewing the long term plans impacting upon the Shire. We looked at the relevant State, regional and local plans relating to the economy and tourism.
3. **Stakeholder consultation** – This phase involved engaging directly with a range of key stakeholders and asking the important questions. The stakeholder groups included business owners, workers, visitors, community groups and government agencies.
4. **Strategy formation** – This stage involved bringing all of these elements together to outline the path forward. What is the plan to address, the issues and opportunities raised?

PURPOSE OF THE PLAN – PART 1

DEFINING ECONOMIC DEVELOPMENT

The practice of economic development is constantly adapting over time to respond to community needs and concerns. There are many definitions on local economic development but perhaps the most widely cited one is by the World Bank. It states, “The purpose of local economic development is to build up the economic capacity of a local area to improve its economic future and the quality of life for all. It is a process by which public, business and non-governmental sector partners work collectively to create better conditions for economic growth and employment generation.” (Source: World Bank)

Improving “quality of life for all” needs to encompass important issues such as environmental protection, cultural appreciation, addressing inequality and raising living standards for all. This broader concept of local economic development, sometimes called ‘sustainable economic development’, is relevant for the Bellingen Shire LGA given the strong values of the community, the cultural significance of the First Nations People, and the large natural areas that make up the LGA.

ROLE OF COUNCIL

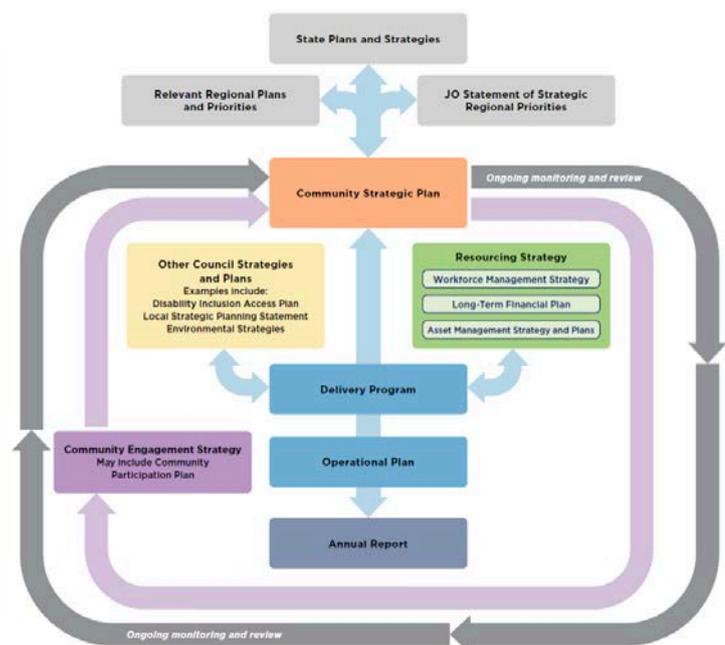
A local council’s role in economic development is ultimately about providing an attractive and sustainable business-enabling environment. Some of the essential economic development-related services provided by local councils to achieve this outcome include:

- Providing leadership, corporate planning and governance
- Planning and facilitating development and the provision of critical infrastructure
- Environmental management, managing town centres and maintaining public spaces
- Advocating for community needs and facilitating productive relationships
- Maintaining and communicating accurate economic statistics and information

COUNCIL’S PLANNING AND REPORTING PROCESS

The NSW Office of Local Government has established the Integrated Planning and Reporting framework to guide councils in how to develop plans for their communities.

The diagram to the right shows the relationship between the plans of the NSW Government and the various plans of Council.



PART 2 – ABOUT BELLINGEN SHIRE LGA

This section provides an overview of the geography, community and economic trends.

LOCATION AND COMMUNITY

The Bellingen Shire Local Government Area (“the Shire” or “the LGA”) is located on the Mid-North Coast of NSW. The Shire can broadly be described in three main geographical areas of the seaboard, valley and plateau. The Urunga area is the seaboard, the Bellingen area is the valley along the river, and the Dorrigo area is the mountains and plateau. The Shire is renowned for high levels of biodiversity with over 160,000 ha of which 54% is either classified as National Park or State Forest.

The Shire is a lifestyle region with an emphasis on cultural activities and social cohesion. The Bellingen Shire is currently home to 13,248 people (ERP 2021) and each community has its own unique characteristics. Agriculture has been the traditional industry for many years but today there are an increasing number of residents who operate small to medium-size enterprises in creative industries involving artists, crafts people, writers, musicians, and horticulturists.

The Shire is also an important tourist destination attracting an estimated 248,000 visitors (TRA, 2021) spending a total of \$46.4 million (2019/20) on hospitality, accommodation and visitor services. There are a range of cultural attractions and festivals, ranging from film, classical and world music, to environmental, arts and cultural events. Each different event attracts distinct and unique audiences and enhances the social and economic life of the region.

Residents of the Bellingen Shire place a high value on the importance of community connections, lifestyle, culture and protecting the environment. According to business owners, these are some of the defining characteristics of the Bellingen Shire community:

There is a different world view than mainstream Australia relating to things such as environment, alternative lifestyles and cultural appreciation

They are creative and entrepreneurial with many employed in creative industries or starting their own businesses across a variety of industries

A high degree of socioeconomic diversity with people from both wealthy and poor financial situations as well as the highly educated and those with no qualifications

An ageing population with the benefits and challenges associated with servicing their needs, and the struggles for local businesses in finding young local workers

A desire to protect what is special with many business owners making the same comment:

“WE DON’T WANT TO BECOME BYRON BAY.”

ABOUT BELLINGEN SHIRE LGA – PART 2

ECONOMIC AND DEMOGRAPHIC PROFILE

Population

The total population of the Bellingen Shire LGA is estimated to be 13,248 people in 2021. The average rate of population growth over the last 10 years is less than 0.3%. This compares to the NSW population growth rate over the same period of about 1.3%. However, there are indications that the population growth rate is likely to rise given the recent approval of residential development applications and new residential land areas.

Growth and Productivity

The Bellingen Shire's Gross Regional Product ("GRP") was \$447m in 2021. The average annual growth rate over the last 10 years (i.e. since 2012) has been -0.2% per year. Over the same period the NSW economy grew at an average of 2.1% per year.

Local Jobs

There was a total of 3,862 jobs located in Bellingen Shire in the year ending June 2021. Similar to economic growth, local employment has been in slight decline over the past 10 years at an average of -0.4%. This equates to an average of 15 local jobs lost each year. The industries responsible for the greatest job losses include (1) Accommodation and Food Services, (2) Retail Trade and (3) Manufacturing. It would be naive not to consider the challenges over the last few years, in particular, the impacts of the COVID pandemic on local jobs.

The two main export industries for the Bellingen Shire are Agriculture and Manufacturing. This traditional industry base is gradually shifting as more jobs are created in construction, tourism and local population-serving industries (e.g. aged care). The top five industries in 2021 by employment include:



Most industry sectors have experienced some job losses over the period 2015/16 to 2020/21 ranging from mild to severe. The two industry sectors that have demonstrated the strongest jobs growth are Construction and Arts and Recreational Services.

PART 2 – ABOUT BELLINGEN SHIRE LGA

Tourism Sector

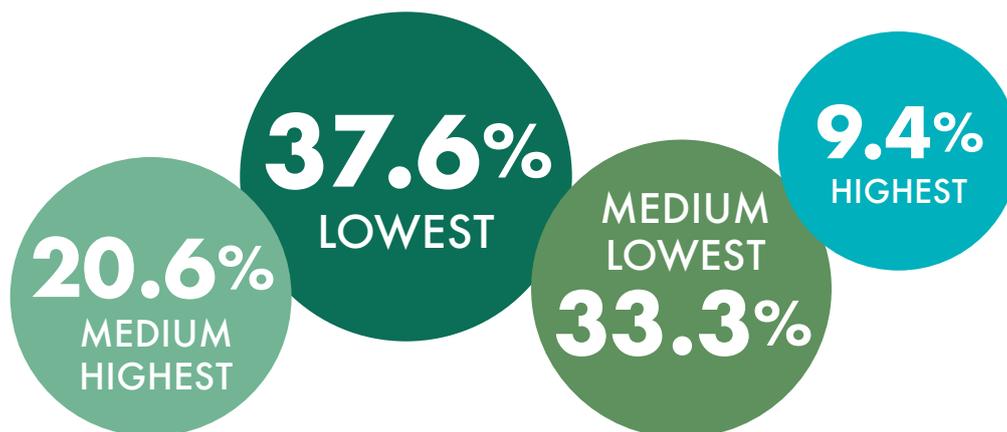
In 2019/20, the total tourism and hospitality sales in Bellingen Shire was \$46.4m. There are 348 jobs directly and indirectly associated with the Tourism sector and this makes up 9.1% of local jobs in the LGA. The Bellingen Shire has lost 47 jobs in the tourism sector from the period 2014/15 to 2019/2020.

Age Profile of Residents

The Bellingen Shire has a higher proportion of residents approaching retirement age and lower representation of young workers. Almost half (49.2%) of the population are above 50 years old compared to the national average of 34%. People aged 20 – 39 make up 15.1% of the resident population compared to the national average of 27.8%. This situation creates challenges for businesses to find young workers but also creates opportunities to service a growing retirement-aged population.

Household Incomes

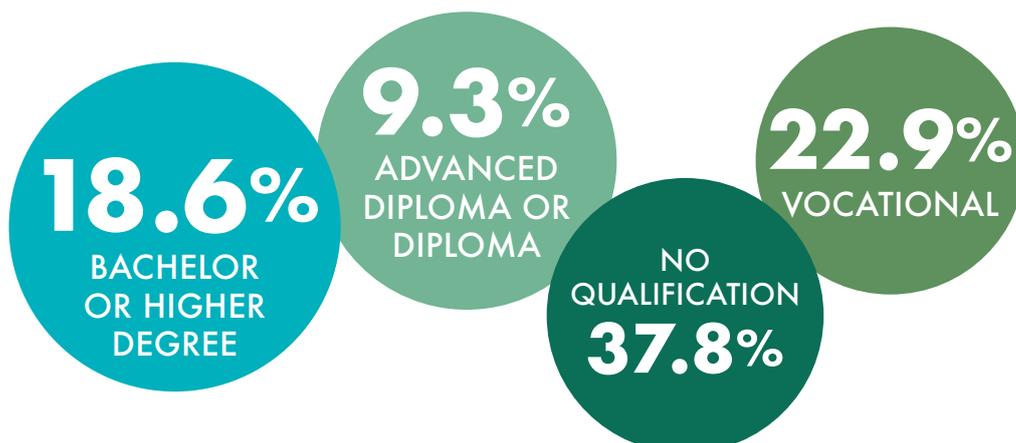
Household income quartiles in the Bellingen Shire are very similar to that of the broader Mid-Coast Region. See statistics here:



Anecdotally, there are reports of high net-worth individuals living in the Bellingen Shire, but many are retired and not reflected in Census income figures.

Education Levels

Education levels of Bellingen Shire's residents are higher than the Mid-Coast Region and Regional NSW. The education attainment levels are as follows:



STRATEGIC CONTEXT – PART 3

The following section reviews the key strategic plans at a State, regional and local level that will impact upon the future direction of the Bellingen Shire LGA.

NSW GOVERNMENT

NSW 2040 Economic Blueprint: Investing in the State's future (2019)

The NSW Economic Blueprint was designed to help chart a course for the NSW economy and keep the State strong long into the future. The 2040 Blueprint makes recommendations about where the State should focus its effort. Some of the relevant aspirations include:

1. Productive, vibrant regions
2. Sustainable environment and resource management

20-year Economic Vision for Regional NSW (2018)

The 20-Year Economic Vision for Regional NSW, released in 2018, sets out the Government's priorities and plans to achieve long-term social and economic success for regional communities across the State, including a chapter on the North Coast region. The "guiding principles" in the vision that are of most relevance to Bellingen Shire include:

1. Affordable, reliable and fast mobile and internet connectivity to support people and businesses
2. A skilled labour force for current and future needs of the regions
3. Regulation and planning to promote commercial opportunities

Productivity Commission White Paper: Rebooting the Economy (2021)

This report is concerned with structural reform of NSW to increase productivity. The strategic themes that have relevance for the Bellingen Shire LGA include:

1. Talent – Supporting a skilled and high-performing workforce
2. Innovation – Enabling new technologies and ways of doing things
3. Housing – Improving housing choice and affordability
4. Infrastructure – Smarter use of infrastructure and natural resources

PART 3 – STRATEGIC CONTEXT

NSW Visitor Economy Strategy 2030: A Roadmap for Growing the Visitor Economy

This strategy was written in the context of COVID-19 when the visitor economy of NSW was in crisis. This updated strategy was intended to aid recovery in the near term and turbo-charge visitor economy growth when travel patterns resume their normal rhythm. The guiding principles of the strategy are as follows:

1. Put the visitor first
2. Accelerate digital innovation
3. Lead with our strengths
4. Move fast, be responsive and agile
5. Collaborate with industry and government

REGIONAL PLANS

Coffs Coast Regional Economic Development Strategy 2018-2022

This strategy was developed to facilitate long-term economic growth opportunities across the region's specialised sectors. It also supports the potential for the Region's emerging specialisations in Creative Industries, Transport and Manufacturing. Some of the priorities of the strategy that are relevant for Bellingen Shire include:

- Grow the year-round visitor economy by diversifying offerings and connecting businesses
- Support regional skills attraction with relocation programs and supply of affordable housing
- Assist emerging sustainable industries by promoting a 'clean, green and lean' image
- Respond to the needs of existing industries through master planning centres, investment attraction and rezoning for industrial and commercial land use

North Coast Destination Management Plan 2018-2021

The North Coast Destination Management Plan ("DMP") was developed to provide strategic direction for Destination North Coast NSW and North Coast NSW tourism stakeholders to plan for the sustainable management, development and marketing of tourism for the North Coast of NSW. The aim of the plan is to help sustainably grow the North Coast visitor economy and in doing so support the NSW Government's goal of doubling overnight visitor expenditure by the year 2020. A summary of the "7 Priorities" in the DMP is as follows:

- 1. Advocacy** – Engage with stakeholder organisations to coordinate the needs of North Coast tourism stakeholders
- 2. Research** – Establish a realistic tourism research system to track visitation, visitor expenditure, satisfaction, behaviour and perceptions
- 3. Investment** – Attract investments that will deliver sustainable tourism development that is in balance with the community and environment
- 4. Development** – Develop tourism products and experiences that appeal to domestic and international visitor markets
- 5. Marketing** – Harness the combined marketing power by facilitating cooperative campaigns with Destination NSW and other partners
- 6. Training** – Assist effective training and skills development support for tourism operators and workers
- 7. Resilience** – Identify and help plan for potential risks and provide support during times of crisis

STRATEGIC CONTEXT – PART 3

BELLINGEN SHIRE COUNCIL

Community Strategic Plan 2035: Connected, Sustainable, Creative (2022)

The new Community Strategic Plan was adopted in June 2022 and provides the long-term vision for the LGA. The vision states: “Our vision for the future must encompass all aspects of living and working in our shire, as well as ways in which we are connected beyond our borders - regionally, nationally and globally. Our vision is about protecting the pristine natural beauty of our environment and enhancing our prosperous and safe community where inclusiveness and sustainable living are embraced, so that creativity and cultural activity can flourish.”

THIS VISION IS SUMMARISED INTO THREE KEY ASPIRATIONS FOR OUR COMMUNITY TO BE:

Connected, Sustainable and Creative

- **Connected** – We are a community that is inclusive, connected to each other in our shire, and with connections beyond - regionally, nationally, and globally.
- **Sustainable** – We strive to live sustainably to ensure that we have enough for all, forever.
- **Creative** – We are a community that is creatively and culturally dynamic. We are ingenious and inventive in finding innovative solutions to problems and challenges.



PART 3 – STRATEGIC CONTEXT

For the Bellingen Shire to be a Resilient Economy is one of the priorities of the plan. The aspirations under this strategic pillar include:

1. “We have meaningful work and vibrant businesses within our community” – the focus is on diversity of new industry, local supply networks, sustainability, infrastructure provision, resilience and community support.
2. “We have balanced, sustainable tourism” – the focus is on broadening visitor experiences, enhancing visitor assets, sustainable tourism operators, and promoting the local creative industry.
3. “We have a sustainable local farming sector that provides us with healthy, fresh food” – the focus is on local food growing, alternative farming systems, environmental sustainability, and that agriculture is valued in the community.

THE THREE KEY ECONOMIC CHALLENGES IDENTIFIED IN THE NEW COMMUNITY VISION INCLUDE:



Reviewing our 2027 Vision: Community survey (2022)

Additionally, between November 2021 and January 2022, Council engaged Place Score to consult with the community on their values and aspirations. As part of this engagement, community members also shared their ideas and provided feedback on the previous Shire of Bellingen 2027 Community Vision. Some of the key findings on community attitudes relevant for the EDTP include:

- Increase focus on local businesses that provide for daily needs
- Increase focus on businesses that support local jobs
- Monitor and review forecasts for population growth to address local education options
- Increase focus on housing affordability and options
- Increase focus on the quality of public spaces and maintenance
- Review communication and engagement strategies

Local Strategic Planning Statement 2020-2040

The Local Strategic Planning Statement (“LSPS”) is an overall strategic framework and vision to guide Council’s long-term land use planning decisions. The 20-year vision is, “To provide agile, innovative and pragmatic land use planning policies that deliver sustainable business, employment and housing opportunities, respond to the challenges of a changing climate, and preserve the natural environment and social diversity that underpins the sense of place that is valued by residents of the Bellingen Shire.”

STRATEGIC CONTEXT – PART 3

The LSPS lists 11 planning priorities but the ones most relevant for the EDTP include:

- **Planning Priority 2** – To routinely identify infrastructure constraints and upgrade opportunities that will enable desired development outcomes.
- **Planning Priority 3** – To provide meaningful opportunities for local employment, sustainable business and establishment and growth.

Economic Development Strategy 2015-2020

This plan identifies the key priorities over the period 2015-2020. The aim is for Council to influence the establishment of a resilient economy in line with our Community Vision of 2027. The key focus areas of the plan include:

1. Resilient economy
2. Infrastructure
3. Tourism
4. Town centre strategies
5. Agri-business and agriculture
6. Creative industries
7. Land for development

THE EDTP 2022-2026 REPLACES THE ECONOMIC DEVELOPMENT STRATEGY 2015-2020

Arts and Cultural Plan 2012

The Plan has been developed to assist in the provision of artistic and cultural services, programs, facilities and ultimately to support and develop artistic and cultural talent in the Shire. The plan has been structured according to the following groups of action areas:

1. Performing Arts
2. Visual Arts & Creative Industries
3. Literature
4. Cultural Diversity
5. Infrastructure & Networks
6. Marketing & Promotion
7. Resources

A Guide for Tourism in Bellingen Shire (2020)

This Guide provides an overview of Tourism in the Bellingen Shire. It highlights research and consultation initiatives around community ideals and how these provide the appropriate framework for tourism planning and promotion. Guiding principles for tourism include:

1. Tourism should promote sustainable economic growth
2. Gumbaynggir Culture should be respected
3. Tourism should reflect a go-slow approach
4. Tourists should understand that this place is not just a tourist destination
5. Tourism must benefit the community in a positive way

PART 3 – STRATEGIC CONTEXT

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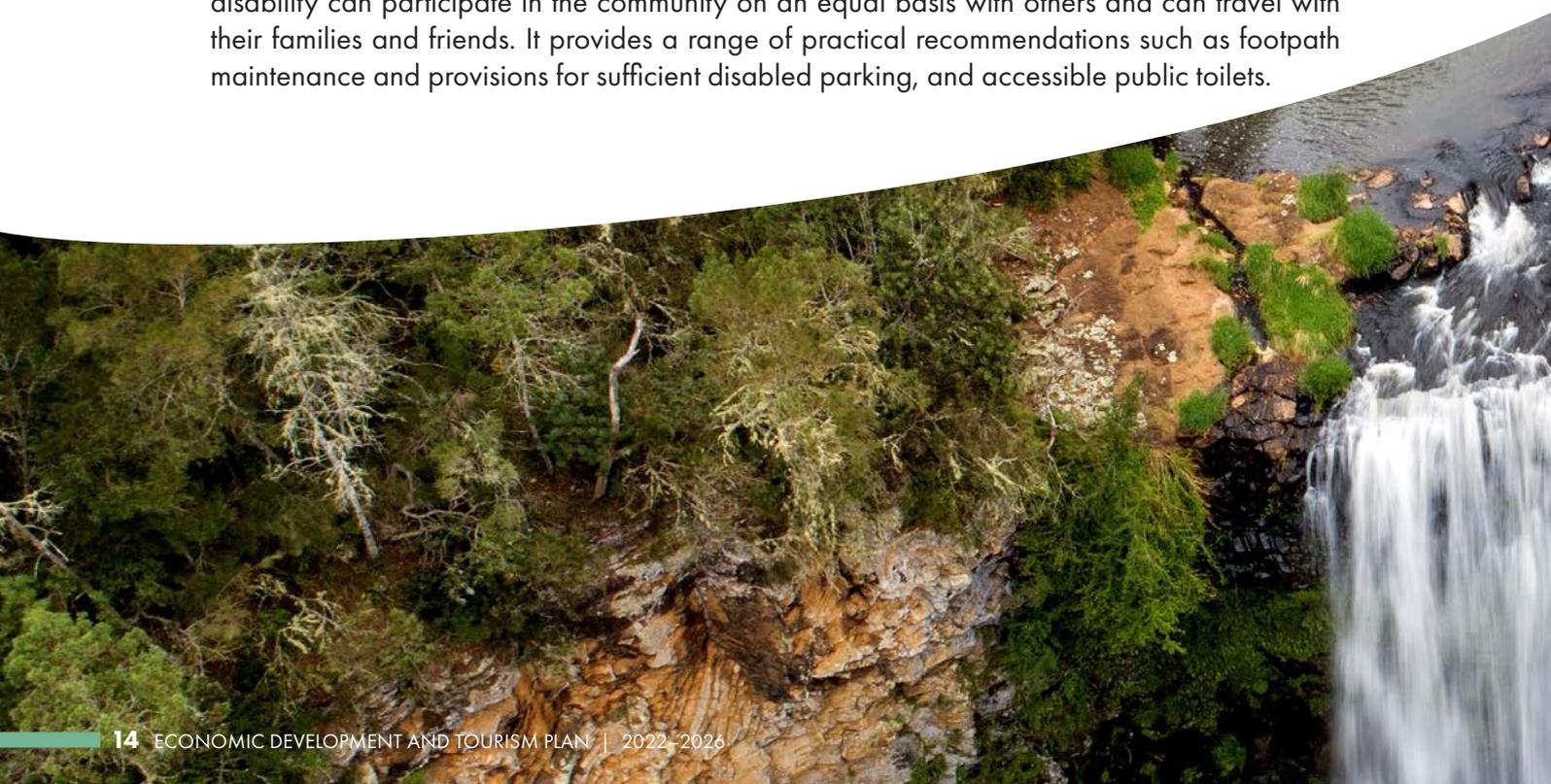
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Inclusive Tourism Strategy 2020-2025

The Inclusive Tourism Strategy is part of Bellingen Council's overall plan to develop the visitor economy. The strategy supports Council's commitment to an inclusive community. Inclusive tourism has a broad meaning ensuring every visitor has a safe and enjoyable travel experience on an equal basis with others regardless of appearance or circumstances.

This strategy adopts and promotes a 'universal design' approach whereby people with a disability can participate in the community on an equal basis with others and can travel with their families and friends. It provides a range of practical recommendations such as footpath maintenance and provisions for sufficient disabled parking, and accessible public toilets.



STRATEGIC CONTEXT – PART 3

Brand Strategy: Defining our spirit of place (2021)

The strategy's aim is to create a destination brand that is 100% the Bellingen Shire, one that defines the essence of our Shire developed through meaningful discussion with the community. Aspects of the brand the community wants to support include:

1. Celebration of, and connection with, our unique natural environment
2. Clear and consistent education initiatives and messaging to 'respect our place', aimed at both visitors and locals
3. Recognition and respect for the unique custodians of this land and their connection to country
4. Increase cultural awareness through development of education programs, tours, products and events for both community and tourists
5. Support and development of sustainably responsible tourism and other businesses

Top five issues or concerns:

1. Poor communication, lack of action, mismanagement or lack of support by Council (on a range of issues)
2. Lack of respect and damage to the environment by visitors and/or locals
3. Concern around the housing crisis and/or tourism's contribution to this
4. Lack of/need for improved facilities and infrastructure for both locals and visitors (e.g. toilets, footpaths, walking and bike tracks, playgrounds, sporting facilities, etc)
5. Managing any negative impacts of over-tourism



PART 4 – FEEDBACK FROM BUSINESS

This section is concerned with providing a summary of the lengthy consultation process that was undertaken to inform the strategic direction of the EDTP.

CONSULTATION PROCESS

The consultation process for preparing the EDTP was hindered by COVID-19 restrictions and so was conducted over an extended 12-month period. The various types of consultation methods included:

- *Site visits* – to town centres, business areas, natural areas and key visitor attractions
- *Interviews with Council staff* – Council staff were interviewed one-on-one and in group sessions to share knowledge and discuss the interrelationships with other projects
- *Interviews with business owners* – Approximately 40 business owners were interviewed, including all chamber of commerce presidents, to understand their experience of running a business in the Bellingen Shire
- *Focus groups with visitors* – two focus groups were conducted with visitors to the Bellingen Shire to better understand their motivations and what they liked and disliked about their holiday experience
- *Workshops with Chambers* – Two workshops were held with chambers of commerce to discuss and determine what the most important critical issues and opportunities were for business in Bellingen Shire
- *LGA-wide survey* – as part of Council’s review of its Community Strategic Plan, Council conducted an LGA-wide survey that included questions on the performance of the local economy
- *Councillor workshop* – NDP presented at a Councillor workshop to provide the findings of the consultation process and summarise the emerging critical issues
- *Business Forum* – Council organised a business forum to share the results of the business consultation process and obtain feedback on the draft themes of the EDTP
- *Draft Plan on Public Exhibition* – the EDTP will be placed on public exhibition for a period of at least 28 days to obtain further feedback from the community

FEEDBACK FROM BUSINESS –PART 4

GENERAL BUSINESS SENTIMENT

Interviews with many business owners across a range of industry sectors revealed two main findings. The first finding is business owners love where they live. They are equally as passionate about the community, culture, lifestyle and the natural environment of the Bellingen Shire as any other local resident. They believe the Bellingen Shire is special and want to preserve its unique characteristics for the long-term.

Many of them also shared their story that they first made the decision to live in the Shire after having visited the area and either brought their work with them or set up a new business as a means of generating an income to support their lifestyle. This is possibly why there is such a diversity of professional businesses in the LGA.

The second finding is many business owners have been doing it tough for a while and do not feel adequately valued, supported or communicated with by Council. Some of this has been due to factors such as COVID-19 but also in planning decisions affecting them. The specific reasons for this vary by location and business type and are elaborated on further below. On a positive note, many businesses expressed a genuine desire for a closer working relationship with Council.

WHAT IS WORKING WELL

When we interviewed business owners and chambers of commerce, one of the questions we asked them was what they thought was working really well in the Bellingen Shire LGA. These were the top answers:

Community connections – the level of connectedness with residents and between business owners is very strong. This was highlighted during COVID-19 when people checked in on each other to make sure people were doing okay.

Welcoming to newcomers – the community is generally very welcoming and most people are able to ‘find their tribe’ once they move here.

Diversity of businesses – there is a plethora of unique and sophisticated businesses operating in the Shire that are often exporting their professional services to international markets.

Cultural scene – like most residents of the Bellingen Shire, business owners really value the artistic and cultural elements of the community.

Bike track to Hungry Head – a number of business owners commented that they appreciate the new bike track to Hungry Head and think it is a good outcome for the community.

Urunga Boardwalk – the boardwalk at Urunga provides a great opportunity for residents and visitors to enjoy the waterviews and engage with the natural environment.

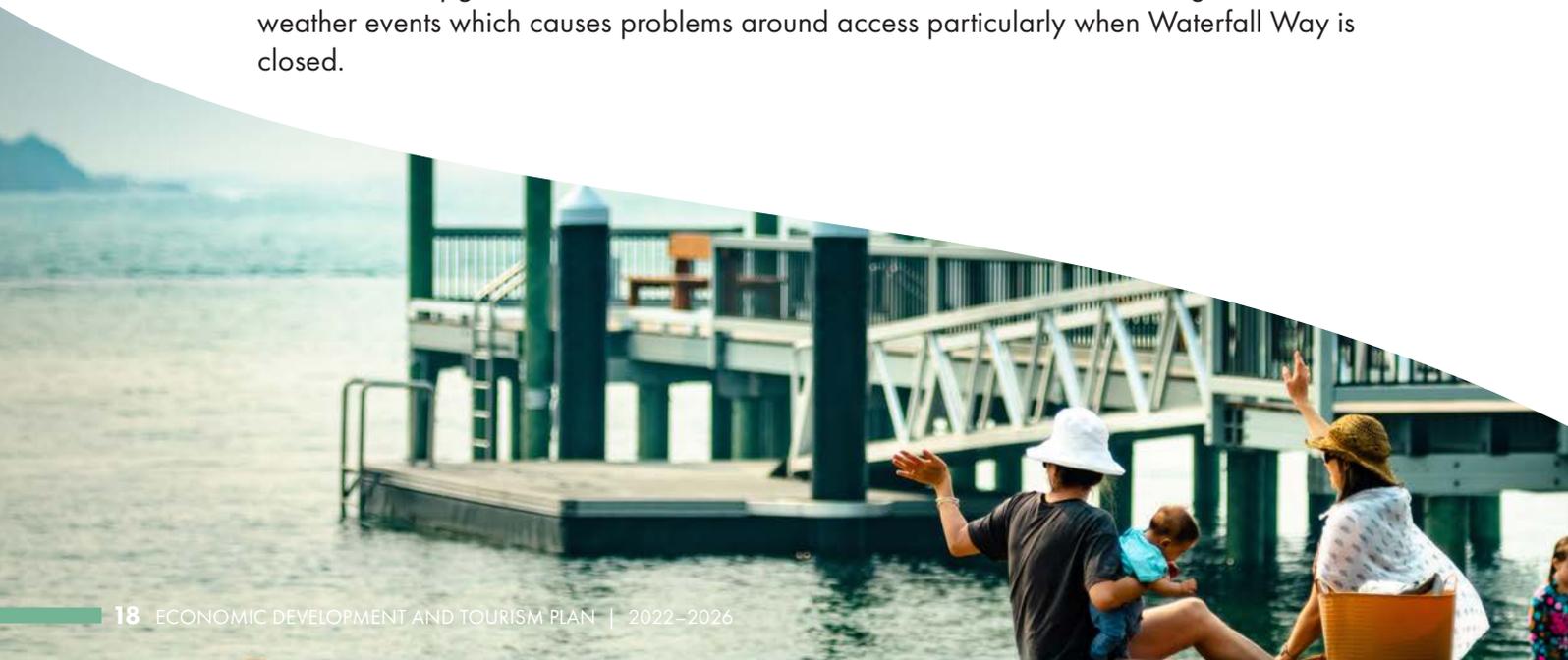
Waterways are always busy – the waterways are always used by people whether for recreation or commercial reasons.

PART 4 – FEEDBACK FROM BUSINESS

IDENTIFIED CHALLENGES FOR LOCAL BUSINESS

There were many challenges shared during the various interviews with business owners. The list below represents the top 10 challenges that were raised the most frequently across different locations and industry types.

1. *Lack of industrial land* – Business owners recognised that it is very difficult to grow the industry base when there is a severe shortage of industrial land. There is no land available for residents to set up small food manufacturing businesses.
2. *Housing affordability* – Housing affordability and availability was mentioned in almost every interview. This was typically associated with the inability of young people to afford to stay in the area. This then makes it difficult for business owners to find young workers for casual and part-time roles (e.g. in hospitality).
3. *Internet coverage* – Business owners that conducted most of their work online commented on the slow internet speeds in certain parts of the LGA. Further work would need to be carried out to determine the areas with poor internet services.
4. *Sustainable growth of tourism* – businesses felt that the tourism industry was not being developed or promoted sufficiently well in the Bellingen Shire given that so many businesses rely on visitor spending. There was equally a recognition that it was something that needed to be managed well to avoid damaging the environment.
5. *Resistance to change* – there is a perception that change in the Bellingen Shire LGA is stifled by influential members of the community. This is preventing genuine progress and business growth.
6. *Nothing for young people* – there is a view that there is nothing for young people in the Shire in terms of local job opportunities and the high cost of housing. Young people have few options but to leave the Shire.
7. *Poor relationship with Council* – many businesses and chambers of commerce expressed a poor relationship with Council. There is a desire though for things to improve.
8. *Town centre planning* – many businesses cited specific problems with the functioning of their town centres such as insufficient parking, poor signage or footpaths.
9. *No night-time economy* – given the Shire’s reliance on visitors, it was strange to many business owners that there was a lack of vibrant night-time economy. Most businesses are closed at night making it difficult for locals and visitors to enjoy after hours recreation.
10. *Infrastructure upgrades* – road infrastructure is unable to deal with flooding and severe weather events which causes problems around access particularly when Waterfall Way is closed.



OPPORTUNITIES FOR BUSINESS AND EMPLOYMENT GROWTH

Businesses were asked what they believed were the best opportunities to support business and employment growth in Bellingen Shire. The top 10 answers included:

1. Support local unique produce and niche industries (e.g. cheese factory)
2. Provision of increased industrial land for business retention and expansion
3. Increase the supply of affordable housing
4. Promote the lifestyle, arts and natural environment as a means of attracting entrepreneurs
5. Improve directional and promotional signage to better communicate where things are and what is available
6. Increase the provision of parking, footpaths and bike paths around town centres
7. The rise of remote working and the number of talented people living in the Shire
8. Many residents have expertise in environmental management that could be leveraged for new business and investment opportunities
9. Support the delivery of new active, nature-based tracks and cycleways
10. Become an arts destination with a range of supporting events

FURTHER OPPORTUNITIES SPECIFICALLY FOR TOURISM

In addition to the more general opportunities to grow business and employment, interviewees offered the following suggestions on how to specifically improve the local tourism industry:

1. Seek to become a recognised destination for arts and culture with supporting events
2. Refresh the visitor information including printed materials
3. Support the delivery of the Koala National Park proposal to attract international tourists
4. Explore greater use of the State forests and waterways for active recreation
5. Investigate regional marketing collaboration to increase visitation
6. Promote the Bellingen Shire's impressive ecotourism and inclusive tourism credentials
7. Invest capital into event facilities (indoor and outdoor) to cater for larger and more varied audiences and events
8. Upgrade the caravan parks and playground equipment for families
9. Attract businesses that cater for tourists and visitors with more expensive tastes (e.g. fine dining)
10. Get things ready to showcase the Dorrigo railway museum
11. Explore new agri-tourism experiences and product development
12. Investigate a pedestrian only mall or plaza section in town centres

PRIORITIES FOR COUNCIL

At the end of the interview, we asked people what area they wanted Council to focus on. These were the top answers:

1. Address housing supply and affordability
2. Provide increased serviced industrial land
3. Master plan town centres
4. Find the right balance with tourism and protecting the environment
5. Strive to be a more business-friendly Council

PART 5 – TOURISM

Tourism is becoming a key industry in the Bellingen Shire. The North Coast Value of Tourism Report 2021, which covers the period of January 2021 to December 2021, states that tourism delivers 9.4% of our jobs, supports 8,066 businesses and directly delivers 5.9% of our region's Gross Value Add (GVA). The Bellingen Shire is part of the North Coast Destination Network and sees 248,000 visitors and \$78m in spend.

KEY VISITOR ATTRACTIONS

This section outlines some of the popular visitor attractions around the Bellingen Shire LGA's key centres.

URUNGA/MYLESTOM:

Various beaches – there are a number of patrolled beaches to choose from where you can enjoy fishing, swimming and surfing. 4WD access is also possible at North Beach at Mylestom and Wenonah Headland.

Boardwalk – the 1.2km long Urunga Boardwalk follows the banks of the Kalang and Bellingen rivers through a unique wetland to the beach. It displays detailed signage about the history of the area and offers a close up of the wildlife along the coast.

The Art Space – the Arts Space is a volunteer run arts and exhibition space located in the main street of Urunga. Hosting a new exhibition approximately every 6-8 weeks, it provides an opportunity for local artists to showcase and sell their works. There are also a number of murals and artworks featured throughout the Urunga town centre.

BELLINGEN:

Bellingen town centre – The town's historic wealth is reflected in the heritage buildings that are now complemented by cafes, gelato shops, pubs, restaurants and interesting retail stores. Two main heritage listed buildings include the Bellingen Memorial Hall, a memorial built to acknowledge and remember our WW1 personnel that is also the largest event venue in the Shire, and the Hammond and Wheatley Building, a beautiful old building that operates as an emporium with everything from clothing and shoes to homewares and jewellery.

Markets – Bellingen Community Markets are held the third Saturday of each month in Bellingen Park. The markets are famous for a wonderful blend of arts, crafts, and local produce. The Grower's Market is held at the Bellingen Showground on the second and fourth Saturday of the month.

Festivals and events – Bellingen host a range of festivals throughout the year including Camp Creative, the Readers & Writers Festival, SWIFF International Film Festival, the Bellingen Muse (fine music) Festival, the Bellingen Improvised Music Festival (BIMF) and River Sounds. Bellingen (and Dorrigo) also host Agricultural Shows. These events are popular with both visitors and residents.

The Promised Land – located near Gleniffer, north of Bellingen, is a scenic drive following the Loop Road along Never Never Creek and is a great place for a picnic or swim.

The Old Butter Factory – this venue showcases the talent of local artists with art galleries and craft shops. The beautifully preserved building also has a popular café.



DORRIGO:

Dorrigo town centre – this quiet town has art galleries, cafés and country shops, as well as the National Trust listed Heritage Hotel Motel.

Dorrigo Markets – on the first Saturday of the month, at the Dorriggo Showground, is a classic country market offering home-grown and homemade foods, eco-friendly goods, clothing and much more. The Made in Dorriggo market is also held 3 to 4 times a year which showcases locally made products from the plateau.

Folk & Bluegrass Festival – the Showground hosts the Folk & Bluegrass Festival with world-renowned artists in a relaxed and intimate setting.

Dorrigo National Park – this bushland is home to the (soon to be upgraded) Skywalk which takes you over Gondwana Rainforests. Many walks take you to the waterfalls in this World Heritage Area.

Dangar Falls – this waterfall is located 2km north of Dorriggo on the Coramba Road. A few metres from the carpark is an accessible viewing platform overlooking the falls, with toilets, a newly upgraded playground and adjoining picnic area. A second path takes you to the base of the falls where you can take a dip in the chilly waters and swim under the falls.



PART 6 – DORRIGO GREAT WALK PROJECT

This section provides a project overview of the Dorrigo Escarpment Great Walk and Arc Rainforest Centre project as well as the possible impacts on the Bellingen Shire economy.

It should be noted that the details of this project were only released to the public at the time of writing this Plan. There will need to be further work in determining all the full extent of the benefits and opportunities presented by this project.



Source: www.environment.nsw.gov.au/dorrigo-great-walk

Artist credit: Studio Hollenstein

PROJECT OVERVIEW

The Dorrigo Escarpment Great Walk and Arc Rainforest Centre is a two-stage project consisting of a new \$56 million-dollar visitor centre and multi-day bush walk based in the Dorrigo National Park. The existing Dorrigo Rainforest Centre will be upgraded to become the new Arc Rainforest Centre which will feature a boardwalk and panoramic lookout to offer accessible and exceptional experiences for visitors. The visitor centre will be the starting point for the stunning new multi-day walk along the escarpment edge through Gondwana World Heritage rainforests with hut and camping accommodation.

The combined project aims to attract more visitors for longer periods with sustainable nature-based experiences to support the tourism sector and local job creation.

The Arc Rainforest Centre

The centrepiece of the proposal is a new Arc Rainforest Centre which will feature a spectacular boardwalk overlooking the World Heritage rainforest. It will provide flexible spaces to be used for a variety of events and be a major drawcard for the area.

A new treetop skywalk with an upper and lower deck will cater for all weather conditions. Spiralling walkways will take visitors down into the rainforest and connect with the existing 6-kilometre Wonga Walk and the new Dorrigo Escarpment Great Walk.

The visitor centre will offer a place for people to learn and connect with the culture of the traditional custodians, the Gumbaynggirr People, and a new way to experience the ancient plants and animals from the surrounding areas.

The Dorrigo Escarpment Great Walk

The proposed Dorrigo Escarpment Great Walk spans Dorrigo and Bindarri National Parks along the rugged escarpment, past flowing waterfalls, huge old growth trees and over wild rivers, as it heads down towards the coast. It will include three suspension bridges and 46 km of walking track. There will be 2-day or 4-day walking options.

To offer enhanced access and affordability, accommodation will include 4 purpose built communal low impact walkers' huts and camping areas with tent platforms and composting toilets.

SOCIAL, CULTURAL AND ECONOMIC BENEFITS

Attracting People to Enjoy Nature and Culture

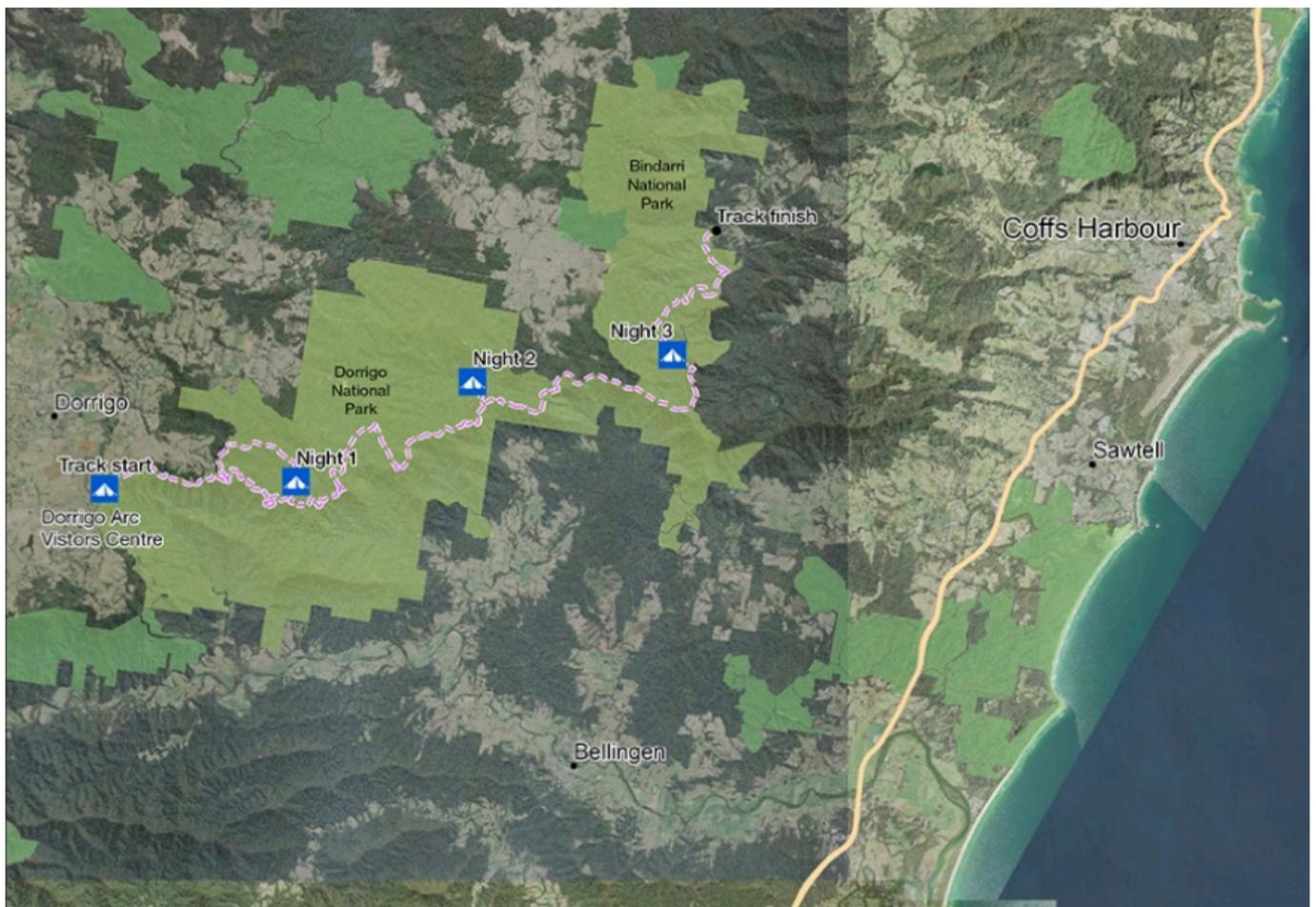
There is an opportunity to engage a broader range of people by providing unique natural and cultural experiences by also working with Aboriginal partners to showcase the local Aboriginal culture. The new

walking tracks are growing in demand and provide health and wellbeing benefits. The option of affordable communal huts is important to allow a wider range of abilities to enjoy the walk.

The new Arc Rainforest Centre will provide access for all abilities to learn about and enjoy the Gondwana Rainforests of Australia. The combination of the new walk and the centre can potentially attract an expanded demographic to grow the visitor economy of Bellingen Shire.

Economic Benefits

This project is a significant capital investment by the NSW Government and is aimed at drawing tourists to regional areas. When completed, the combined project is estimated to attract an additional 200,000 visitors per year. The construction phase of the project will generate 280 jobs and will support a further 270 ongoing jobs throughout the region.



Source: www.environment.nsw.gov.au/dorrigo-great-walk

PART 6 – DORRIGO GREAT WALK PROJECT

FURTHER CONSIDERATIONS TO EXPLORE

The influx of an additional 200,000 visitors will likely have a profound impact on the local area of 13,000 residents. These influences will need to be properly considered and monitored over time. Some of the initial impacts and opportunities are outlined below.

Investment Attraction

The Bellingen Shire is currently a popular destination for older travellers. This new walking trail and viewing centre will likely attract a new demographic and in much greater numbers. These younger visitors and families will likely have different needs in terms of accommodation, retail, health services and entertainment. This will provide the Bellingen Shire, and in particular Dorrigo, with many new opportunities for business development and employment growth.

Local Procurement and Skills Exchange

The construction phase of the project is projected to cost \$56 million and create 280 jobs during the build. This will also create many opportunities for local contractors bidding for work. Where possible, there may be opportunities for local firms to contract or sub-contract for parts of the project. There may also be opportunities to explore a 'skills exchange' model whereby education providers, such as TAFE, deliver on-site training so unskilled people can make a start in the construction industry. This is particularly relevant for the Shire given the skills shortage and high rates of people without a qualification.

Town Centre Master Planning

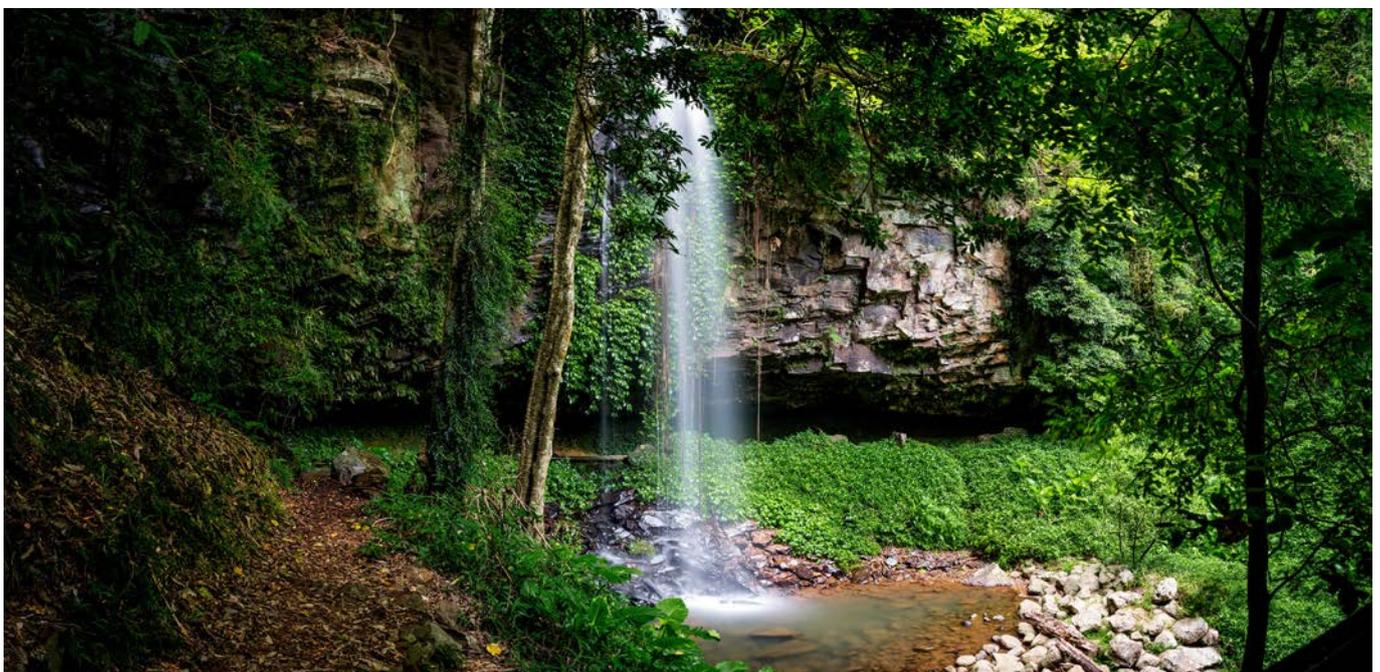
This project can be a catalyst to re-examine master planning town centres across the Shire. Dorrigo for example, may need increased commercial and residential development to accommodate large numbers of visitors. The new walk and visitor centre may serve as a good opportunity to address other town centre planning issues such as telecommunication networks, parking, signage and amenities which may no longer be fit-for-purpose.

Transport and Infrastructure

The increased visitors to the area will place more pressure on existing road infrastructure. Waterfall Way is the main connecting road between Urunga, Bellingen and Dorrigo. This road is often closed due to weather events, landslips and falling trees. There is now an even stronger case to progress with the long-planned alternative route to ensure visitors and residents have access all year round.

Marketing Opportunities

The new walking track and visitor centre will likely expose the Bellingen Shire to a new and larger audience. There is therefore an opportunity to communicate to new visitors the values of the Shire, such as environmental and cultural considerations, as well as investment attraction opportunities. Now is the right time to update marketing strategies and materials.



PART 7 – PLANNING THE ECONOMY WE WANT

This section is concerned with addressing the issues raised and organise the plan together into strategic themes, actions and performance indicators that can be measured over time.

Vision Statement

By 2026, Bellingen Shire will have town centres that are inviting to customers, productive for business owners, and provide more affordable housing for residents. Entrepreneurs will be encouraged to start businesses within the Shire and there will be increasing employment opportunities provided by the growing industry base. Visitors from a range of ages and levels of ability will be able to enjoy the environment and attractions. Artists and creatives in our community will be supported to generate a sustainable income from their work. Infrastructure will be planned to meet the demands of a growing residential and visitor population.

PART 7 – PLANNING THE ECONOMY WE WANT

GOAL 1 – TOWN CENTRES THAT ARE FIT-FOR-PURPOSE

Objectives	Town centres are inviting for customers and accommodate business growth.
	Town centres and surrounding areas are increasingly providing affordable housing.
Actions	Conduct a master planning project to address issues in town centres such as parking, signage, pathways and amenities.
	Conduct scenario testing to see how town centres and infrastructure can accommodate increased visitors for the new Dorrigo walk and viewing centre.
	Continue to advocate for an alternate route to alleviate pressure on Waterfall Way.
	Plan for the delivery of increased affordable housing in and around town centres in the Shire.
	Review the supply of commercial space in town centres to accommodate business growth.
	Look for opportunities to activate and adaptive re-use of unused buildings (e.g. for start-ups or artists).
	Conduct an audit to understand the levels of internet coverage and speeds across the LGA and advocate for improvements where necessary.
	Investigate the provision of business hubs or shared office space to support entrepreneurs.
	Conduct a review of entertainment venues and facilities across the LGA to determine what is currently available for event organisers.
	Conduct a refresh of visitor information available in each town centre to showcase what is on offer.

GOAL 2 – SUPPORTING ENTREPRENEURSHIP AND INDUSTRY DIVERSIFICATION

Objectives	That there is a growing number of new small businesses.
	That there is a healthy and growing industry base.
Actions	Conduct a land use study to determine how best to deliver additional serviced industrial land.
	Council to review its own land holdings to determine how best to support increased industrial land.
	Council to trial a 'business concierge program' with improved customer service for businesses development applications.
	Look for opportunities to leverage the construction of the new Arc Rainforest Centre to support local contractors.
	Promote investment attraction opportunities to service the influx of new visitors for the Dorrigo walk and Arc Rainforest Centre.
	Support the delivery and promotion programs for new entrepreneurs run by the NSW Government and local business groups.
	Prepare home-based business fact sheets and information nights to explain the process of starting a business from home.
	Council to provide investment enquiries with up-to-date information on the local economy and introductions to local business groups.
	Council to work in partnership with local chambers of commerce to encourage greater networking and mentoring opportunities.
	Council to consider holding a regular Mayor's Business Breakfast to recognise the important contribution of local business owners.
	Support a local business awards program with a range of relevant categories.
	Manage a quarterly business e-newsletter to improve communication between Council and business owners.

GOAL 3 – INCLUSIVE TOURISM THAT VALUES THE ENVIRONMENT

Objectives	<p>Bellinghen Shire promotes its eco-tourism and inclusive tourism credentials.</p> <p>New tourism experiences and accommodation options and delivered to cater for a broader range of visitors.</p>
Actions	<p>Recognise the important contribution of tourism sector and monitor annual performance metrics.</p> <p>Conduct an audit of amenities, seating and infrastructure needed to protect the environment from increased visitation.</p> <p>Council to hold an annual roundtable discussion with accommodation providers to understand their needs and better promote visitor experiences.</p> <p>Refresh of the printed information regarding visitor experiences in the Bellinghen Shire.</p> <p>Continue to promote eco-tourism accreditation to attract the right kind of visitor.</p> <p>Facilitate and trial agri-tourism opportunities.</p> <p>Investigate regional partnerships for joint marketing campaigns.</p> <p>Continue to support the development and promotion of the Great Koala National Park.</p> <p>Attract new demographics through active-tourism experiences, events and infrastructure (e.g. new mountain bike trails).</p> <p>Explore environmental goods and services industry potential.</p>

GOAL 4 – GENERATING EMPLOYMENT THROUGH ARTS AND CULTURE

Objectives	<p>To further establish the Bellinghen Shire as an arts and culture destination.</p> <p>To support local artists and creatives so they can generate a sustainable income.</p>
Actions	<p>Investigate the provision of increased short-term accommodation options within the LGA.</p> <p>Hold an annual forum with event organisers to better understand how to support them.</p> <p>Standardise forms and simplify the approval process for someone seeking to deliver an event or festival.</p> <p>Continue promotion of year-long events calendar to support various art forms.</p> <p>Seek to partner with local Aboriginal advisors to share cultural experiences associated with the Dorrigo Walk and Arc Rainforest Centre.</p> <p>Support programs that provide business mentoring for local creative artists.</p> <p>Hold granny flat information nights and investigate how best to simplify the process of approval.</p> <p>Consider a modest grants program to encourage live performance throughout the LGA.</p> <p>Encourage local artists to network together and develop collaborative marketing programs.</p> <p>Review the range of uses for the two showgrounds to encourage a greater variety of events.</p> <p>Where relevant seek to adaptively re-use heritage buildings to showcase arts and live performance.</p>

PART 7 – PLANNING THE ECONOMY WE WANT

EVALUATION AND REPORTING

HEADLINE ECONOMIC INDICATORS FOR BELLINGEN SHIRE LGA

INDICATOR	BASELINE	ANNUAL REPORTING	TARGET (BY 2026)	SOURCE
No. Jobs	3,862 (2021)	✓	4132.34	ID Economy
No. Businesses	1,254 (2021)	✓	1,350	ID Economy
GDP \$ millions	\$447 (2021)	✓	\$480 million	ID Economy
Tourism & Hospitality Sales \$ millions	\$46.4 million (2019/20)	✓	\$50 million	ID Economy
Industrial land	71.63 ha	-	Increasing	Council
No. of visitors	248,000 (2021)	✓	Increasing trend	Tourism Research Australia/DNSW
# of households in need of affordable housing	259 (4.8%)	✓	Decreasing trend	Housing ID
No. of people employed in Arts and Recreational Sector	82 (2021)	✓	100	ID Economy

KEY PERFORMANCE MEASURES OF FOR THE ECONOMIC DEVELOPMENT AND TOURISM PLAN

MEASURE	ANNUAL REPORTING	TARGET (2026)	SOURCE
No. of actions completed	-	75%	Council
Business satisfaction rate with Council programs	✓	75%	Annual Business Survey
DA processing times for business applications	✓	Decreasing trend	Council
Visitor Feedback Surveys	✓	Increasing trend	Tourism Research Australia/DNSW

Monitoring and Reporting Process

Council will monitor and report on the progress of the EDTP according to Council's regular reporting processes such as the Annual Report. Actions contained in the EDTP will be allocated funding according to Council's Combined Delivery Program and Operational Plan listed on Council's website.

CONCLUSION

The **Bellingen Shire Economic Development and Tourism Plan** was developed by Council in conjunction with its business and tourism stakeholders. Recognising there is work to do, the Plan also acknowledges the opportunities that exist for growing the Shire's economy through diversification, fit for purpose infrastructure, sustainable tourism and supporting niche markets like our agri-business and arts and culture. By doing this, we will continue to build a resilient economy that is **Connected, Sustainable and Creative**.

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