

TAMWORTH TOMORROW

DRIVING THE TAMWORTH REGION'S ECONOMIC GROWTH

2016-2021





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TAMWORTH

As the major centre for a catchment area of some 200,000 people, Tamworth is one of most progressive and innovative region's in NSW. The region has a strong reputation for its quality of life for its residents, supported environment for business and industry and economic opportunities for investors.

The Tamworth Local Government Area covers a diverse economy fuelled by a growing population of over 60,000 residents. The towns of Manilla, Barraba, Nundle and Kootingal, along with another 17 hamlets offer an attractive lifestyle underpinned by a strong regional economy.

Ideally situated on the main inland route between Victoria and Queensland for freight logistics, there are three major airlines providing daily flights to Sydney and Brisbane, along with daily train and bus services. From city living to country retreats the region boasts quality and diverse shopping, education, health services and sporting facilities in an affordable and supported community.

Offering a range of quality employment opportunities, Tamworth fosters entrepreneur growth, research development and continuous learning throughout its industry sectors and community.

As an agricultural hub for Australia, a service centre for surrounding mining developments, a hub for small business and strong growth in emerging sectors such as aviation and advanced manufacturing, the region is thriving.

An emerging creative industry is fostered through a range of events such as the internationally recognised Tamworth Country Music Festival, art galleries, museums, Tamworth Regional Conservatorium of Music and strong key industry sector growth.

Alongside a vision and execution; partnerships and collaboration underpin the Tamworth region. The region's positive "can do" attitude is reflected in the continuous investment in large scale infrastructure projects, the diversity and quality services, and new residents moving to the region.

DRIVING ECONOMIC PROSPERITY

Tamworth Tomorrow is a strategy focussed on driving the economic growth of the region through increasing the region's population base, which fuels the economy, driving innovation, investment, cultural activity and entrepreneurial spirit. The Strategy has a strong people and place focus and harnesses knowledge, research and innovation as key drivers of Tamworth's economic future.

Tamworth Tomorrow, is a guiding document for everyone that contributes to the economic development of Tamworth. The aim of the Strategy is to foster Tamworth's growth, by building new and strengthening the existing industry and service base that will drive the region's development as the leading regional centre in NSW.

The Strategy places a high premium on attracting skilled professionals alongside developing the region's existing employee skills base to match the requirements of business and industry and drive new opportunities and cultural change.

In a fresh approach to the region's economic development, Tamworth Tomorrow defines the foundations that underpin the region's economy and high growth sectors, identifies the region's industry pillars and recommends specific actions based on the identified strategic drivers to activate and drive long-term growth.

The implementation of Tamworth Tomorrow will require extensive collaboration among stakeholders committed to enhancing Tamworth as a leading vibrant and progressive region in Australia.

It places a high premium on partnerships and the development of networks, clusters, and collaboration as a means of building the region's capacity and result in harnessing resources, fostering innovation, increasing productivity and the integration of new technology. Investing in the region's educational assets will ensure students and the regions workforce contribute to the broad economic and knowledge base of the region; enhancing Tamworth's global competitiveness.

The Strategy notes that to facilitate long term-growth the region must become "globally fluent" by remaining in front of global trends and encouraging innovation, advanced manufacturing, direct investment and ensuring freight flow in the region.

Tamworth Regional Council is committed to establishing an environment that fosters partnerships; propagates creative thinking; facilitates a business engagement focus that enables economic activation; increasing the region's competitiveness and being responsive to the changing needs of the region's stakeholders.

The Strategy drives cultural change. By attracting skilled professionals the region's knowledge base will grow, driving entrepreneurial development and growing a strong innovative focus that underpins our economy.



The Strategy recognises that:

- People are central to economic growth. People drive economies. Through internal and external investment, knowledge sharing and workforce capability our residents drive and sustain a productive economy.
- There is a need for the ongoing development and renewal of infrastructure to support new investment, reduce production costs, improve quality of life and enable the long term sustainability of the region.
- The retail sector plays an important part in the region's economy by preventing the leakage of money out of the area and enhancing the image of the Region.
- The education sector is a key cornerstone of the regions competitiveness. Preparing young people for a global economy and upskilling the professional workforce will enable our workforce and companies to respond flexibly to complex problems, be more specialised, productive, and innovative.
- By enhancing the quality of living including active recreation spaces and ensuring provision of an array of services and facilities, the region will attract talented and creative people.
- Strategic partnerships and collaboration underpin the success of the Strategy. It is a

'whole of economy' plan that is not just about what local government can do but what can be achieved through working in unison with a wide range of stakeholders and all levels of government to drive economic prosperity for the region.

- Tamworth's economic growth will result in benefits not only to the Tamworth Local Government Area, but the broader region, NSW and Australia.
- Central to this is Tamworth's capacity to assist in relieving the population pressures, and therefore, infrastructure and service pressures faced by metropolitan areas such as Sydney, Brisbane and Newcastle.

The purpose of this plan is to:

- Set a unified direction for the region for the next five years to help it to achieve its priorities and aspirations in terms of economic growth;
- Work in synergy with other key documents for the region, rather than replicate or work against their objectives;
- Be clear and succinct, setting achievable targets in the associated Implementation Plan; and
- Support other Tamworth Regional Council strategies and regional plans.



ECONOMIC **PROFILE**

ECONOMIC PROFILE

DIVERSE ECONOMY

Tamworth's robust economy is supported by diverse industry sectors. Employment is spread across Health Care and Social Assistance (3,477), Retail Trade (2,697), Manufacturing (2,092), Education (2,064), and Accommodation and Food Services (1,609).

PRODUCTION GROWTH

The Gross Regional Product (GRP) of the Tamworth region was \$2.71 billion (June 2014) an increase of 10% in the past five years. The sectors recording the greatest proportion of GRP (by value) are Health Care and Social Assistance (11.4%), Manufacturing (9.9%), Construction, and Financial and Insurance Services (both 9.1%).

THRIVING BUSINESS

There are over 5500 registered business in the Tamworth LGA with over a quarter of these in the Agriculture, Forestry and Fishing sector. Tamworth Business Chamber plays an important role in supporting the home based and small business sector and is one of the most active chambers in NSW. Tamworth's key industry sectors (with gross value add 2014) ensure the diversity of the region's economy:

- Health Care & Social Services (\$273.1M)
- Manufacturing (\$236.8M)
- Construction (\$218.8M)
- Financial & Insurance Services (\$217.5M)
- Education & Training (\$176.4M)
- Retail Trade (\$174.9M)

EMPLOYMENT

There are over 27,000 residents employed in the Tamworth region. The region has access to a broader labour force of over 105,000 residents. The average income was \$45,700 (ATO Taxation statistics 2012-13) with 46% of the population earning an average weekly wage of \$600-\$1249. Tamworth's unemployment rate consistently lower than the wider region being 7.93% (2014).

AFFORDABLE HOUSING

Tamworth has affordable housing with sales prices well below NSW valuations with the median house price being \$311,000 and \$232,000 for units/townhouses (June 2015). This is \$257,847 lower than the median house valuation for NSW and some \$723,000 lower than the mean house price in Sydney (June 2015). Rental costs are also consistently lower in Tamworth than NSW.

DEVELOPMENT GROWTH

Over \$397.6 million of development was approved in the 2013/2014 and 2014/2015 financial years. Of this approximately, \$232.6 million was for commercial development and \$165 million for residential construction.

TALENT

There is a high level of skilled professionals in the region with over 53% of the regional labour force being formally qualified. Of these 23% have qualifications in Management / Commerce and engineering/related technologies.

INCREASED TOURISM

Offering a vast array of events and experiences, Tamworth receives over 1.1 million visitors every year. In 2014, tourism generated over \$239m towards the economy (\$112.10 value add) and employs over 1245 residents directly.

ECONOMIC INDICATORS

60,495

POPULATION
ERP 2015



\$397.6m

DEVELOPMENT APPROVED
2013/2014 & 2014/2015

Total 27,000 employees

\$45,700

AVERAGE INCOME
2012/2013

\$2.71bn
GROSS REGIONAL PRODUCT

\$311,000

AVERAGE HOUSE
JUNE 2015

26,101

LOCAL JOBS
JUNE 2014



LARGEST EMPLOYERS

FROM STRENGTH TO STRENGTH



POPULATION

Tamworth has a population of over 60,000 residents and services a broader catchment area of some 200,000 people. With one of the highest projected population rates in regional NSW, the region is expected to grow to 68,000 in the coming 15 years.

Tamworth's current population growth (1.47%) is better in percentage terms than some major regional centres such as Port Macquarie, Coffs Harbour, Wagga Wagga, Dubbo, Maitland, Newcastle, Wollongong and Toowoomba. A key objective of Tamworth Tomorrow is to build on this organic growth and drive a higher population.

The region has a strong youth presence higher (0-15 years - 22.1%) than the NSW average with forecasts indicating a growing trend in families.

The increased proportion of younger residents together with an ageing population indicate continued population growth and are key factors in driving investment in and around Tamworth.

INDUSTRY

Tamworth's economy is robust and grew by \$19 million between 2012/13 and 2013/14 with the largest growth industries being Mining Services (16%); Construction (15%); Rental, Hiring and Real Estate Services (12%) and Retail Trade (11%). With national trends showing a slowing of the mining sector in the future, the remaining strong sectors are expected to grow to support the increasing population.

Rather than having a concentration in one or two major industries the region's economy is diverse and well structured, spread across multiple key industry sectors. This non-reliance on any specific sector ensures the community is buffered against major fluctuations in industry and spurs economic growth.



INFRASTRUCTURE

Tamworth is supported by large infrastructure development contributing to investment and economic growth through increased productivity and by linking resources to industry, people to jobs and the region's products to markets. Tamworth Regional Council allocates a significant proportion of its \$117 million operating budget to capital works and infrastructure projects whilst significant public and private investment developments such as the Tamworth Regional Livestock Exchange and Australian Equine and Livestock Events Centre signals confidence in the ongoing sustainability of the region.

The Tamworth Region Infrastructure Strategy (2014) identifies regionally significant capital works that will be required to support growth plans and community aspirations over the next 20 plus years. Road, rail, open spaces, sporting and recreational, water and waste management and community projects are identified, The Tamworth Regional Development Strategy (2008) provides the framework to manage growth setting strategic direction for both urban and rural areas.

Well planned transport infrastructure includes a well planned CBD, and regional road network that improves connectivity, rail and airport.

Projects such as the Tamworth Regional Livestock Exchange, the Australian Equine and Livestock Events Centre, Chaffey Dam upgrade, demonstrate sound strategic planning and the region's commitment to increase the capacity and deliver large scale infrastructure projects.

"Tamworth Regional Council recognises that forward planning and funding provision will need to be provided for regionally significant infrastructure projects if the region is going to successfully and sustainably harness its growth potential."

TRC: 2014 Infrastructure Strategy

LAND RELEASE & ZONING

Tamworth Regional Council has provided for future land release to accommodate increased economic opportunity and a growing population. In and around the urban area, 238ha of unconstrained residential zoned land is immediately available for development. There are approximately 7 ha of unconstrained commercial land available and moves are afoot to zone a further 35 ha. Approximately 70 ha of unconstrained industrial land can be developed and Tamworth Regional Council has strategically planned to expand the industrial zone exponentially. Potential across all three zones also exists in the wider region.

DEVELOPMENT

There is a significant and unspoken confidence in the Tamworth region as an economic powerhouse for the New England and North West regions. Over \$397.6 million of development has been approved in the previous two financial years, which is reflected in the thriving construction industry and contribution to the region's Gross Regional Product.

These public and private sector developments extend across new tourism infrastructure, residential and industrial subdivisions, to major expansions of existing industrial and commercial premises.

ATTITUDE

"Can do" and "Make it Happen" attitudes are being cemented as the cornerstone of the Tamworth region which will drive economic growth into the future. Tamworth Regional Council, a leader in economic development is focused on harnessing the knowledge that exists in the region, facilitating development and investment and initiating collaboration on projects and initiatives that enable a high quality of living for its residents supported by robust infrastructure and support for industry; whilst strengthening and retaining the region's social fabric.

The positive spirit of stakeholders to collaborate and execute on vision is a distinguishable feature that sets the region apart.

A nighttime photograph of a street scene. In the foreground, a road is blurred with long, vibrant red and orange light trails from passing vehicles. To the left, a group of people are seated at outdoor tables under a large black umbrella. In the background, a building with a sign that reads "TOOHEYS NEW" is visible, along with a tree and a "LEFT" street sign. The scene is illuminated by warm streetlights and the building's interior lights.

VISION

As a thriving regional centre, Tamworth embraces its lifestyle, fosters its competitive advantages, and works in unison with a "make it happen" spirit.



STRATEGIC **FRAMEWORK**

STRATEGIC FRAMEWORK

The Economic Development Framework is critical to the economic growth of the Tamworth region. The Framework developed provides a structured approach to aid business leaders that aspire to be leaders and innovators in their industry, for partners to collaborate and harness new opportunities and to share knowledge to enable global competitiveness.

The Framework allows Tamworth Regional Council to strategically plan and facilitate actions that will activate the region's Strategic Drivers.

The Economic Development Framework is supported by an Implementation Plan that focuses on the areas where Tamworth Regional Council can make a direct and real contribution in line with the community's long term vision.

It recognises the role of other levels of government, industry groups, education and health services and other organisations in achieving economic prosperity. This will be achieved through the delivery of programs and efforts to improve economic resilience across the region's Industry Pillars.

STRENGTHENING OUR FOUNDATIONS

Economic growth for the region is dependent on strong foundations in:

1. Collaboration and Partnerships
2. Education and Skills Development
3. Incentives, Assistance and Lower Costs
4. Technology and Innovation
5. Quality of Community Living

DRIVING OUR KEY INDUSTRY PILLARS

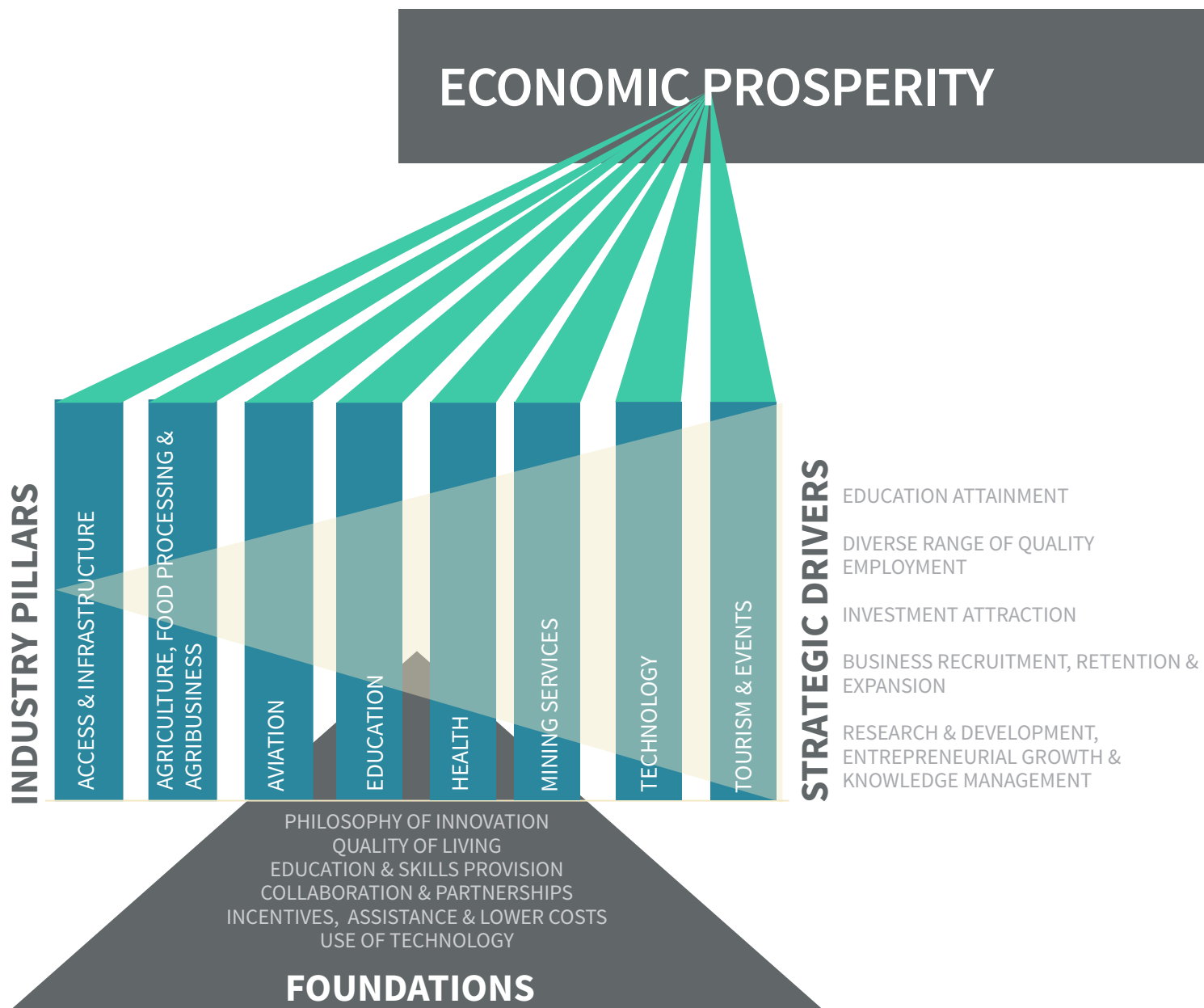
Partners and Stakeholders will drive Tamworth's growth in areas of the region's key industrial foundations and key growth sectors:

- Access & Infrastructure
- Agriculture, Food Processing and Agribusiness
- Aviation
- Education
- Health
- Mining Services
- Technology
- Tourism & Events

ACTIVATING OUR STRATEGIC DRIVERS

The strategic drivers which will activate the growth in these Industry Pillars are recognised as:

- Education Attainment
- Diverse Range of Quality Employment Opportunities
- Investment Attraction
- Business Recruitment, Retention and Expansion
- Continued Research and Development, Entrepreneurial Growth & Knowledge Management



REGIONAL **TARGETS**

POPULATION GROWTH - Achieving population growth above current benchmarks and projections.

LABOUR FORCE CAPACITY - Individuals are skilled in new areas and industries to assist in broader capability development of the labour force.

ECONOMIC DIVERSITY - A diverse economy with a focus on industry with strong flow on effects.

CULTURAL ACTIVITY - A highly sought after region of choice, attracting highly skilled residents and industry from outside the region to create new ideas, new technology, and new creative content.

INNOVATION - Regional centre of innovation, Research and Development and commercialisation.

INFRASTRUCTURE - Key strategic infrastructure is strategically planned for and delivered ahead of time.

COLLABORATION & PARTNERSHIPS - Leading with shared strategic vision.

REGIONAL PROFILE - Identified and recognised as a region of choice. 'Make it happen' is a key philosophy behind driving outcomes for the region.

One of the keys to economic growth lies in the ability to attract the creative class, and translate that underlying advantage into creative economic outcomes in the form of new ideas, new high-tech businesses and regional growth.



INDUSTRY **PILLARS**

ACCESS & INFRASTRUCTURE

Connection drives the region's businesses, strengthens the economy, and makes Tamworth accessible to a global market. Whether it is communicating via email, phone or moving the product in and out of the region, Tamworth is accessible and supported by large infrastructure development and networks.

Tamworth's robust transportation and logistics network, via road, rail and air, is a cornerstone of the region's vitality; outside of its commercial benefits, the network gives city residents and visitors the means to reach and enjoy all aspects of life the region has to offer.

Whether it be the transportation of goods, telecommunications or our journey to work, ensuring the Tamworth region moves easily and efficiently is essential to economic growth.

Strengthening the region's long term water supply, supporting major infrastructure investment and harnessing the use of innovative technology will assist in growing the Regions industry sectors.

International relationships present immediate opportunities to share the region's agriculture knowledge and encourage further investment into the region.

The Access & Infrastructure pillar seeks outcomes that:

- Has governance and policy arrangements needed to provide safe, sustainable, affordable and reliable infrastructure.
- Is strategically planned for goods, services, information and people to move into and through the region's economy.
- Encourages strategic investments and improvements in major transport, energy, water, and communications infrastructure.
- Is underpinned by innovation to meet future demands of a growing regional centre
- Connects people globally through the innovative use of technology and enabling technology infrastructure.
- Builds sustainable business strategies for major infrastructure developments that contribute to their ongoing sustainability and the local economy.
- Continued investment and sustainable regional road infrastructure planning for continued growth that supports freight and vehicle movements in and out of the region.

Connectivity contributes to investment and economic growth through increased productivity and by linking resources to industry, people to jobs and the region's products to markets.

AGRICULTURE, FOOD PROCESSING & AGRIBUSINESS

The area plays a crucial role contributing to Australia's economy in terms of food transportation and distribution industries and through the exports of processed meats and agricultural products. The region is founded on the core agricultural pursuits in beef, sheep, grain, dairy, poultry and lucerne production, the region boasts rich agricultural land.

Due to the close proximity to agricultural enterprises the region is supported by a strong food processing sector. Food product manufacturing generated over \$440m in output in 2013 and employing approximately 1,400 people accounts for 5.4% of total employment.

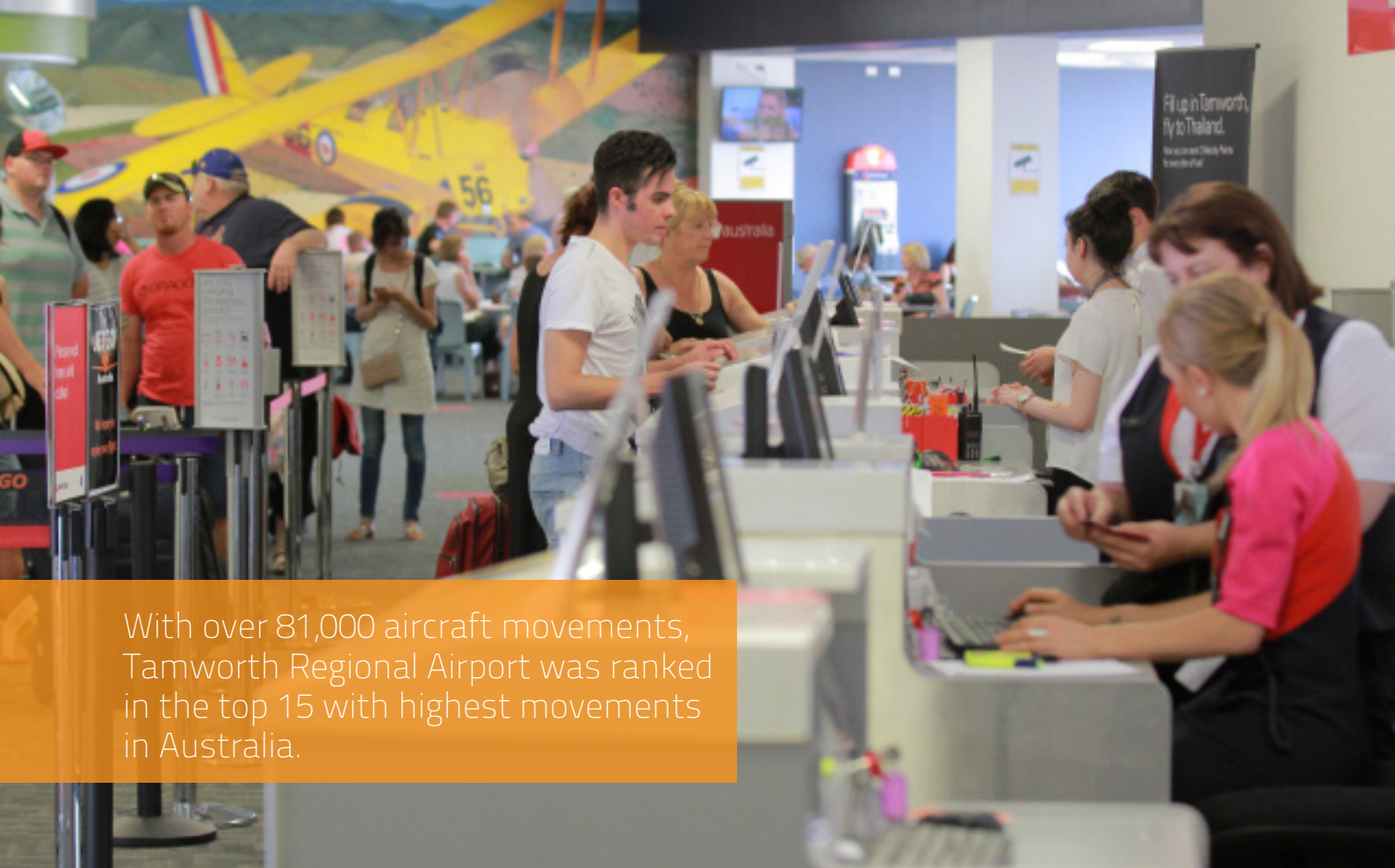
The key infrastructure that supports the industry outputs is the Tamworth Region Livestock Exchange (TRLX), a state of the art saleyard (\$17m) that currently handles over 760,000 cattle and 2,400,000 sheep annually.

Opportunities exist to work collaboratively with the agriculture and food processing sectors to share knowledge and innovative techniques in terms of value add, supply chain and production processes. Other areas for a partnership approach exist in terms of the sourcing and supply of skilled and unskilled labour, strategic issues such as energy supply, biosecurity regulation and freight logistics.

The Agriculture Pillar seeks outcomes that:

- Sustains and future proofs region's water supply.
- Is strengthened by R&D, innovation and technology
- Protects the viability and sustainability of farm land.
- Mitigates the effects of climate change.
- Minimises regulation and uses a collective 'pull' to respond to changes that effect the industry.
- Is able to access global markets through cost effective and efficient transport infrastructure.
- Mitigates issues with supply chain management
- Has access to a pool of skilled and unskilled labour
- Pursues opportunities involved in value adding to existing processes.
- Streamlining processes and minimising costs for expansion.
- Promotes and captures new market opportunities in Asia and other countries.

The Agriculture industry generates over \$164million in total exports. The sectors total sales (output) grew from \$179m in 2005/2006 to \$257m in 2010/2011.



With over 81,000 aircraft movements, Tamworth Regional Airport was ranked in the top 15 with highest movements in Australia.

AVIATION

The aviation sector is founded on the facilities and scope of Tamworth Regional Airport. The Airport is deeply linked into the region's economic activities, with these linkages increasingly driven by growth in leisure tourism and business travel and the regional expansion of strategic resources and agricultural activities.

Tamworth Regional Airport is one of the busiest regional airports in Australia, moving some 180,000 passengers and 81,000 aircraft in 2015. Projections indicate that with an annual population growth rate of 1.5% suggests an annual passenger demand of approximately 320,000 passengers by 2035.

With 81,000 aircraft movements the Airport was ranked in the top 15 with highest movements in Australia. The Airport precinct accommodates a diverse and innovative industry base supported by designated land and modern infrastructure. Located on 600 hectares the airport provides four runways and is capable of accommodating large jet engine aircraft such as B737 and A320. The Airport also owns and operates an Instrument Landing System.

The precinct is home to a flight training service centre with the presence of several large flight training and aeronautical training companies due to the onsite accommodation available.

In addition the Airport is growing a regional centre for aircraft maintenance. Qantaslink undertakes all heavy maintenance on the NSW Dash 8 aircraft with approval to undertake significant expansion due to the closure of the service in Melbourne and Sydney.

There is significant potential for strengthening aircraft maintenance, air access, aviation technology services and significant scope remains for establishing new commercial air passenger routes. A designated business case for the Airport, supported by the Tamworth Regional Airport Master plan, will outline specific opportunities to grow the Airport as a leading aviation hub.

The Aviation Pillar seeks outcomes that:

- Delivers innovative near-term infrastructure solutions for landside design and moving passengers.
- Has appropriate long term master planning for the Airport supported by a sustainable business model.
- Sees the expansion of aviation routes.
- Ensures compliance with aviation regulations.



With over 60 education providers, the sector employs some 2,011 people servicing a catchment area of some 200,000 residents.

EDUCATION

As a regional centre Tamworth provides education services to a catchment of some 200,000 residents in the New England and North West of NSW. The education facilities in the region are diverse with 29 primary schools and 10 high schools including independent and selective schools.

The region is supported by the major campus of TAFE New England, University of Newcastle's Department of Rural Health, University of New England campus, Tamworth Community College, Regional Conservatorium of Music, Northern Inland Academy of Sport, College of Country Music and numerous flight training and aeronautical schools with associated facilities.

The region provides education and training facilities in a range of specialist areas including aviation with a strong presence of companies delivering aeronautical and flight training based from Tamworth Regional Airport.

The Tamworth Agricultural Institute (TAI), located on 80.83 hectares, is the principal research institute for the cropping zone of northern inland NSW. It is a Centre of Excellence for Northern Farming Systems and is

dedicated to helping ensure agricultural industries and rural communities remain economically viable and ecologically sustainable.

Immediate opportunities exist to export the region's knowledge in agriculture, grow the sector's knowledge base and works with industry to export knowledge globally. In addition there are opportunities to encourage closer collaboration between existing educational providers. There is a unique opportunity to establish a cluster of tertiary providers that specialise in the areas of aviation, agriculture, engineering and mining related studies and technology, R&D that can utilise existing infrastructure and provide skills and training to meet skills shortages in the region.

The Pillar seeks outcomes that:

- Connects education and training to employment.
- Increases educational attainment and participation rates.
- Increases access to education and training including effective educational pathways.
- Improves the quality of educational outcomes
- Develops a vision of excellence for education and training for the Tamworth region.
- Promotes a balance between academic and vocational training.
- Attracts professionals and upskills the workforce

HEALTH

Health care is one of the fastest growing industries in Australia and Tamworth's health infrastructure and services play a crucial role in the economic growth of the region. The sector is the largest employer (11.9%) and generates \$104million in exports.

The Tamworth Community Health Service is part of the Hunter New England district and hosts the Rural Referral Hospital, the only one of its size within a 3 hour radius. The hospital provides 265 beds with a 24 hour Accident and Emergency Department, high level Surgical and Medical services, including a Diagnostic Cardiac Catheterisation laboratory, Burns Unit, Rehabilitation services (including Brain Injury), a Diabetes Centre, Banksia Mental Health Unit, Renal services, Oncology, Radiology and Pathology. Tamworth Community Health Centre is located adjacent to the hospital, providing access to a range of community health services.

The region hosts the North West Cancer Centre which services the New England and North West regions and is also serviced by the Tamara Private Hospital. There is also an array of specialist and general practitioners servicing the broader region.

There will be greater demand for aged care and service provision and Tamworth has recently seen significant investment in associated facilities and services.

There is potential to continue to attract this investment supplying a robust and expansive health care system and coupled with an easily accessible region promote Tamworth as an attractive retirement destination.

The Pillar seeks outcomes that:

- Connects health care service providers.
- Ensure appropriate infrastructure to support growing population.
- Ensure appropriate level of services to meet quality of life expectations.
- Utilises the latest technology and innovative measures in delivering services.
- Attracts and retains health care professionals
- Has access to skills development and educational service provision.

The Health Care and Social services sector provides over 3400 local jobs (11.9% of total jobs) and generated \$104 million in total exports (2012/2013).

MINING SERVICES

The Tamworth LGA is ideally located in proximity to significant areas of resource/mining production with six coal mines operating in the broader region. There has been strong growth in the mining sector with the contribution to Gross Regional Product growing by 140% from 2006 to 2011 and further growth expected into the future.

The Tamworth LGA is a major service centre to the mining sector which contributes \$14.4 million directly to gross regional product and \$14.4 million in value added through purchases of goods and services from 340 local businesses (including contractors). The mining sector directly employs 468.5 Full Time Equivalent positions in the Tamworth LGA, distributing wages of \$53.9 million.

Tamworth borders one of the largest coal basins in the country (Gunnedah), anticipated to be experiencing massive growth in extraction in the coming years, rivaling Gunnedah with the Hunter Valley.

As the indirect supplier of goods and services for the industry and relocation hotspot for miners and families, Tamworth gains direct economic benefits without the negative impacts that can be experienced by towns closer to the mining industry.

Opportunities exist to harness the full potential of the mining activity into the future through meeting business supply demands and the provision of a high quality of life to attract workers and their families.

Close monitoring through engagement with the industry sector is critical to ensuring the region is strategically placed in terms of land use impacts of future growth. Simultaneously there needs to be an awareness of the potential economic and social impacts in a downsizing of the industry and ensure the economic diversity of the region.

The Pillar seeks outcomes that:

- Ensures planning for appropriate levels of infrastructure.
- R&D into clean technologies.
- Rationalises the cost of labour and compliance
- Ensures companies engage in Corporate social responsibility.
- Continues to see service based business grow and sustain the industry sector.

The Tamworth region is a major service centre to the mining sector which contributes \$22.65 million directly to Gross Regional Product and \$14.4 million in value added through purchases of goods and services.

TECHNOLOGY

To remain competitive in state, national and global markets the industry base that drives the Tamworth economy must ensure it is maximising advancements in technology. Innovation in Tamworth's industries will bring high level jobs and higher salaries. Attracting a scientist or software engineer triggers a multiplier effect, increasing employment and expanding salaries in the local economy.

Advanced Manufacturing plays an important role in the Tamworth economy. The Manufacturing sector is spread across food products, wood, machinery, transport equipment and fabricated metal amongst others. The total value added by the manufacturing sector increased by \$243.1 million between 2008/09 and 2013/14 (value add) and generated \$758 million (3.9%) in total sales in 2013/2014. The uptake of advanced manufacturing will support existing manufacturers to enter new markets, devise new products and improve productivity. It will also help establish innovative local industries by creating new business models, products and processes.

The need to ensure a broad range of school activities are supported through an information technologies (IT) or a technological infrastructure is essential to creating a learning environment that will help students enter and adapt to the workforce. A learning environment that is founded on problem solving and creative thinking will result in a workforce that is founded on innovation and increase the knowledge base and competitiveness of the region.

Connection to high speed broadband throughout the region will increase business productivity, innovation and product development. This will lead to cost savings throughout the supply chain network, greater efficiencies and profitability for the region's industry base. Ensuring equitable internet access for residents will assist in connecting communities, knowledge sharing and allow access to global information and cultural resources.

Creating a strong and supported tech start-up ecosystem is essential for Tamworth. Fostering an ecosystem where people see opportunities to start a business, where people believe in the skills and knowledge they hold, and where entrepreneurial successes are highly visible in the media will assist in growing an entrepreneurial base in the region.

The Pillar seeks outcomes that:

- Has continuous workforce development.
- Attracts more and fosters the entrepreneurial base in the region.
- Has strong supported Tech Start-up ecosystem
- Is supported by a culture of inclusiveness.
- Celebrates entrepreneurship and encourages the broader community to participate.
- Has a learning environment conducive to entrepreneurship.
- Has connectivity as a centrepiece

"The application of technology to existing industry and tech startups are well placed to drive productivity growth throughout the economy by reducing both the (per unit) labour and capital inputs required to produce goods and services."

(PWC: 2015)



Tourism is both a major economic activity and lifestyle driver for the Tamworth region and visitor expenditure impacts a number of regional economic sectors through flow on effects.

TOURISM & EVENTS

Tamworth has key tourism strengths and assets including a significant major events calendar a large Visiting Friends and Relatives (VFR) market; and a growing business sector that is attracting more corporate visitors.

Tamworth receives over 1.1m visitors per year with tourism generating over \$239m towards the local economy bolstered by Tamworth's globally recognised Country Music Festival which receives 50,000 visitors pa, generating over \$100m in economic benefits.

The domestic overnight visitor stays an average of 2.2 nights spending \$372 during their stay. Over 20% are business travellers with Tamworth also receiving a high proportion of visitors holidaying (32%) and visiting friends and family (36%). Over 10,000 international visitors stay an average of 21 nights.

As identified by the Tamworth Capital of Country Destination Management Plan 2016, the region can also be positioned as a centre for sporting events and cultural tourism with opportunities to extend length of stay and international visitation. In addition, the business event sector can be expanded and leveraged to promote local tourism products, increase average length of visitor stay and encourage repeat visitation. This positioning provides the opportunity to add value and generate synergies between initiatives targeting international students, business events, investment and leisure markets.

The Pillar seeks outcomes that:

- Connects operators in the region.
- Builds on Tamworth's established brand.
- Improves the quality of visitor experiences.
- Extends visitor length of stay, and therefore, expenditure.
- Drives the tourism dollar throughout the region
- Offers a rich tourism experience.
- Develop a deep and supported destination brand and marketing platform.

IMPLEMENTATION **PLAN**



IMPLEMENTATION PLAN YEAR ONE



KEY STRATEGIC OUTCOMES & TASKS

The actions outlined in the Implementation Plan (Year 1) align with the strategic drivers that will activate growth and sustainability of the key industry pillars.

The Strategic drivers are identified as:



EDUCATION ATTAINMENT



PEOPLE & INVESTMENT
ATTRACTION



DIVERSE RANGE OF QUALITY
EMPLOYMENT OPPORTUNITIES



BUSINESS RECRUITMENT,
RETENTION & EXPANSION



ENTREPRENEURIAL GROWTH



R&D and KNOWLEDGE SHARING

OBJECTIVES

The key objectives for Year One are identified as:

OBJECTIVE 1:

Raise the region's profile as an emerging & progressive destination to live, do business and visit.

OBJECTIVE 2:

Ensure a robust, diverse economy that is accessible and connected.

OBJECTIVE 3:

Foster partnerships and networks focussed on attracting and building knowledge, innovation and R&D activities to the Tamworth region.

OBJECTIVE 4:

Partner to build and maintain globally competitive economic infrastructure so it meets the needs of local industry and enhances the region's quality of life for its residents.

OBJECTIVE 5:

Encourage new and further investment in the Region to support existing industry, enhance quality of living and provide greater employment opportunities.

It is not the intention of the Strategy to replicate existing Tamworth Regional Council or regional strategies that are focussed on specific areas, however, work in synergy and supports these planning documents. It is critical that outcomes from the Implementation Plan are reviewed in line with these planning documents to ensure effective planning for the future prosperity of the region.

REPORTING

As there are local, national and global trends and emerging innovation in terms of product and service delivery, it is imperative that the Strategy be reviewed internally every 12 months. This will ensure Tamworth is responsive to changes effecting the industry base and minimise any impacts to the regional economy. Therefore, the Strategy and associated Implementation Plan needs to be broad enough so that Council can respond and facilitate a sound response/action to harness each emerging opportunity for the Tamworth region.

It is important that not only the Action Plan be reviewed on a quarterly and annual basis but outcomes of the actions contained reviewed - "What worked, what didn't and what can we do better". Regular monitoring, feedback and delivering a course of action for improvements will lead to continual innovation in terms of delivery to achieve Tamworth's Economic Vision.

OBJECTIVE ONE:

Raise the region's profile as an emerging & progressive destination to live, do business and visit.

STRATEGIC DRIVER FOCUS AREAS



People and
Investment Attraction

NO.	ACTION	MEASURE	PARTNERS
1.1	Develop a 'Brand' strategy for the Tamworth region.	Strategy Developed	Council
1.2	Develop an online presence in synergy with tourism destination marketing including a review of the usability and effectiveness of economic development websites and tools including social media an update of the region's Economic Profile and statistics contained within 'Tamworth Tomorrow' on an annual basis.	Website reviewed	Council
1.3	Develop a suite of key message to ensure consistency for the Tamworth Brand on external sites and publications (eg Evocities, RDANI).	All marketing touch-points reviewed	Council Regional organisations NSW Government Evocities
1.4	Develop a 'Welcome Pack' for new businesses.	Welcome pack developed and distributed	Council (Environmental/ Economic Development) Tamworth Business Chamber Real Estate Agents
1.5	Work with local media to identify opportunities to promote business and residential case studies.	Local media engaged and feature business achievements.	Industry NSW & Australian Government Tamworth Business Chamber Council (Destination Tamworth, Community & Engagement) Media Evocities
1.6	Reinvigorate of 'New Residents Welcome Program, including a survey of perceptions, and development of case studies. Investigate use of sponsorship.	Assess other area Programs, appropriate budget and report to Council	Council Industry Tamworth Business Chamber Media
1.7	Continue to participate and support Evocities as a means of marketing the region into the Sydney Market and raising the profile of the Tamworth region.	Participation continued and return on investment assessed annually	Council Evocities
1.8	Facilitate a Tamworth Regional Council Economic Unit presence that fosters partnerships that is highly visible and accessible by the business community.	Location assessed, actioned appropriately	Council (Investment & Growth Division)

OBJECTIVE TWO:

Ensure a robust, diverse economy that is accessible and connected.

STRATEGIC DRIVER FOCUS AREAS



People and Investment



Business Retention,
Recruitment & Expansion






R&D and Knowledge
Sharing

NO.	ACTION	MEASURE	PARTNERS
2.1	Activate a key stakeholder industry leaders forum for business to communicate freely with Council and each other and strategically assist driving regional economic development.	Tamworth Tomorrow formed & reported accordingly	Council Industry partners State & Federal Government Members of Parliament Tamworth Business Chamber NSW Business Chamber
2.2	Work with internal Council departments to increase communication and establish protocols for business interaction.	Internal Business Comms Group Formed	Council
2.3	Review Council's existing communications and newsletters and their relevance to business commencing with economic development focussed communication.	Review undertaken	Council
2.4	Explore feasibility of establishing a 'Grants Program' for identified business sectors including small/start up businesses that fosters innovation and business growth.	Feasibility undertaken and reported accordingly	Council
2.5	Support externally facilitated local networking initiatives.	Supported and reported to Council accordingly	Council State & Federal Government Members of Parliament
2.6	Encourage and help promote State and Federal Programs that can build the capacity of Industry.	Programs promoted.	Council State & Federal Government
2.7	Pursue and support Tamworth as a 'Smart City.	Reported to Council accordingly	Council Members of Parliament NBN Co Tech Providers
2.8	Continue to facilitate and prioritise rollout of NBN in the Tamworth region including an educational program to ensure uptake of NBN and support regional initiatives that promote a digital economy.	NBN roll out commenced 2016	Council State & Federal Government Commercial partners
2.9	Investigate the CBD becoming WIFI enabled.	Reported to Council accordingly	Council Industry Partners
2.10	Develop a Business Plan for the Tamworth Airport Infrastructure that ensures it is aligned with the Airport's Masterplan.	Brief developed.	Council Airport Stakeholders State and Federal Government
2.11	Maintain support and regular communication with Village Business Groups.	Regular meetings held with lead village groups	Barraba Business Chamber Nundle Business Chamber Manilla representative Other villages as identified Council
2.12	Collaborate with Inland NSW and Destination NSW to drive Tourism outcomes for the region.	Ongoing	Council Industry Inland NSW Destination NSW
2.13	Continue to support small business through Council's involvement in the Small Business Friendly Council Program through the NSW Small Business Commissioner.	Ongoing	NSW Small Business Commissioner Council Industry
2.14	Collaborate with other organisations, such as RDANI, Regional Australia Institute and Regional Capitals Australia, on initiatives and projects that will benefit the Region.	Ongoing	Various regional, state and federal organisations Council




OBJECTIVE THREE:

Foster partnerships and networks focussed on attracting and creating a culture of innovation and entrepreneurship where building knowledge, innovation and R&D activities are central to local business activities.

STRATEGIC DRIVER FOCUS AREAS			
 Business Retention, Recruitment & Expansion		 Entrepreneurial Growth	 R&D & Knowledge Sharing
NO.	ACTION	MEASURE	PARTNERS
3.1	Investigate the establishment of an Innovation and Commercialisation Network to facilitate knowledge sharing, mentoring and innovation between business.	Meeting held with stakeholders to discuss interest.	Council Industry partners State & Federal Government Members of Parliament Tamworth Business Chamber NSW Business Chamber Education providers
3.2	Deliver a series of Programs, in collaboration with State Government agencies, aimed at nurturing start up business, entrepreneurial activity and innovation.	Program developed.	Council Industry Tamworth Business Chamber State Government
3.3	Encourage local industry to investigate state and federal grant programs focussed on commercialisation, R&D and innovation.	Grant news disseminated.	Council Industry Tamworth Business Chamber State Government Regional Organisations
3.4	Leverage and continue to develop relationships made through international visits and existing sister city relationships with a focus on economic development.	Ongoing and reported to Council.	Council International Sister Cities State Government Agencies NSW and Tamworth Business Chambers Regional organisations Interested commercial partners
3.5	Investigate a "Start-Up" Cluster group for entrepreneurs and new business.	Expression of Interest developed and distributed.	Council Industry Tamworth Business Chamber State Government Regional Organisations
3.6	Investigate the establishment of a Start-Up Centre which draws together entrepreneurs and fosters a start-up ecosystem.	Centre investigated and assessed.	Council Industry Tamworth Business Chamber State Government




OBJECTIVE FOUR:

Ensure the Tamworth's region's workforce is closely aligned to local industry needs and the region's ambitions by increasing educational attainment.

STRATEGIC DRIVER FOCUS AREAS			
 Business Retention, Recruitment & Expansion		 Education Attainment	
		 Diverse Range of Quality Employment Opportunities	
NO.	ACTION	MEASURE	PARTNERS
4.1	Develop a Talent and Skills Group to work with and advise industry and providers on Tamworth region's education and training needs.	Group formed and active.	Council Leadership Group Key Educational Providers
4.2	Investigate the establishment of an 'Educational Precinct' with campuses to deliver known specialisations required by the industry pillars.	Investigation undertaken, reported and assessed.	Council Training providers Industry Universities
4.3	Facilitate a centralised annual regional Program of training opportunities within the region (online tool - alignment 1.2).	Training Calender established, maintained and up to date.	Council Regional Organisation State Government Tamworth Business Chamber NSW Business Chamber Training Providers
4.4	Leverage opportunities for knowledge sharing with international destinations that will maximise investment opportunities utilising key industry pillars.	Opportunities assessed and advanced as required.	Council (environmental/ Economic Development Tamworth Business Chamber Real Estate Agents
4.5	Encourage regional collaboration between researchers and the advanced manufacturing sector centred on commercial outcomes to generate new global growth markets for the sector.	Investment Prospectus developed.	Council State Government Tamworth Business Chamber Industry

OBJECTIVE FIVE:

Encourage new and further investment in the Region to support existing industry, enhance quality of living and provide greater employment opportunities.

STRATEGIC DRIVER FOCUS AREAS			
 Business Retention, Recruitment & Expansion		 Diverse Range of Quality Employment Opportunities	
		 People and Investment	
NO.	ACTION	MEASURE	PARTNERS
5.1	Develop an International Investment Prospectus and translated to Chinese.	Prospectus developed and distributed	Council Industry State & Federal Government
5.2	Investigate an Investment Attraction Program.	Program investigated and recommended as determined	Council Industry Tamworth Business Chamber Evocities
5.3	Develop a business case for the 'Northern Inland Regional Sports Precinct' and apply for external grant funding.	Business Case developed & potential grant funding sources identified	Council Sporting bodies
5.4	Facilitate grant writing workshops to organisations including Not for Profit, industry and community groups to attract more external funding to the Region.	Grant workshop(s) held.	Council Industry Business Chambers Not for Profit sector
5.5	Provide support to those businesses and organisations seeking external funding for Projects	Projects assessed and letters of support supplied where deemed appropriate	Council
5.6	Ensure a timely, coordinated approach to external investment enquiries.	Enquiries assessed and responded to in a timely manner	Council
5.7	Maintain a database of external investment enquiries to the Region.	Database maintained	Council



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TAMWORTH TOMORROW

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