



Bathurst Region Economic Development Strategy | **2018-2022**

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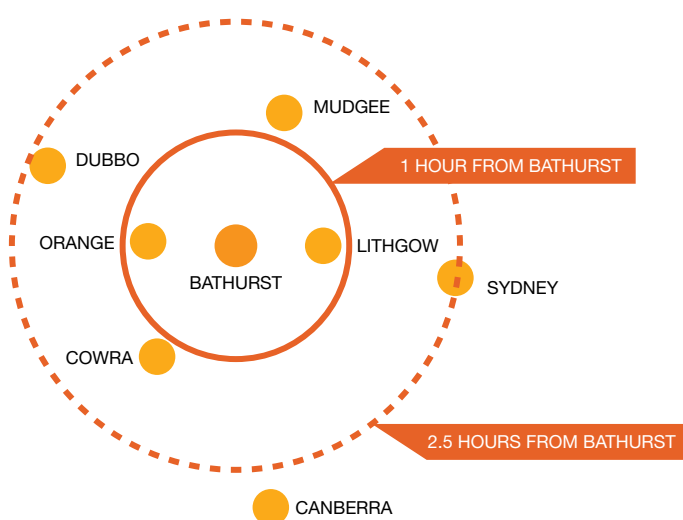
The Bathurst Region

The Bathurst Region is located in Central NSW and covers an area of 3,818km². Bathurst represents the best of both worlds with easy access to Sydney (2.5 hour drive) and an idyllic regional lifestyle, supported by the continual development of city infrastructure. For this reason, Bathurst experiences strong population and economic growth, presenting exciting new business and investment opportunities. Bathurst is the largest LGA in the region and represents one-fifth (20%) of the total Central West economy.

Bathurst's location provides unrivaled logistical opportunities. Bathurst is situated on the Great Western Highway which leads directly to Sydney, and is the starting point of both the Mitchell and Mid-Western Highways. Additionally, the Main Western rail line runs through Bathurst with a daily commuter train service to Sydney. Bathurst aerodrome also provides daily services to Sydney.

As a demographically young city with a median age of 37, Bathurst is recognised as the education hub of the Central West with over 60 institutions employing over 2,000 residents. These institutions not only provide excellent education, but also many students reinvest their skills into the local economy, providing the city with some of the best skills on offer. Industrial land and commercial office space is readily available, including the strategically located Bathurst Services and Trade Centre and the Kelso Industrial Estate. A strong and diverse economy underpins the Bathurst community with Education, Food Manufacturing, Health Care and Construction being the main industries in terms of employment and economic contribution. Bathurst has 3,432 GST registered businesses (source: ABS 2017).

Key food manufacturing companies located in the Bathurst region include Devro, Mars and Simplot. Bathurst also has a strong public administration presence being home to many state and regional Government offices. Bathurst has a thriving retail sector servicing a catchment area of approximately 146,000 people (2016). With approximately 163,000 square metres gross leasable area (GLA) of retail, bulky goods and office floorspace, an additional 50,000 square metres GLA will be required to service a future population of 55,250 by the year 2036 (Profile ID, 2017).



Mayor's Message

It is with great pleasure that I present the Bathurst Region Economic Development Strategy 2018-2022. The Strategy represents a new focussed direction for Council, community and the private sector to drive growth in the Region.

The Strategy recognises that economic development cannot succeed in isolation, and requires partnerships between all levels of government, industry, not-for-profit associations and the broader community. Therefore, the Economic Development Strategy is the result of broad consultation with these groups. The strategy is responsible for driving continued local business growth, innovation, investment, jobs growth, residential relocation and attracting businesses to the region. The Bathurst Region is vibrant with an exciting future. It is a community that is progressive, innovative, and strong. Bathurst has a diverse business base of more than 3,400 businesses and is recognised as a leader in education with more than 60 institutions including the head campus of Charles Sturt University. The Bathurst Region is now firmly centre stage in the continued development and growth of the Central West, with the fastest population growth, highest socioeconomic ranking and a contribution of almost 20% to the region's Gross Regional Product.

Through the provision of successful economic development programs including business workshops, the Bathurst Jobs Expo, business attraction and business growth initiatives and resources, Bathurst Regional Council is now recognised as a national leader in economic development. The Regional Australia Institute (RAI) has ranked Bathurst 15th nationally out of 563 LGAs for 'Local Economic Development Support' and 4th in New South Wales from 152 LGAs.

A key component in Council's economic development participation is the development of the Second Circuit at Mount Panorama and the focus on motorsport. The Second Circuit will be accompanied by a motorsport technology park, which creates its own opportunities to encourage business associated with the motor industry or other commercial and industrial operations to relocate to Bathurst.

The Second Circuit at Mount Panorama is one facet of our plans for future economic growth and development in this city and our Economic Development Strategy for 2018-2022 will guide all our endeavours in this field as we continue to build on Bathurst's prosperity.

With the support of local partners in the state and federal governments and the private sector, Council is planning for a prosperous future. Built on solid leadership and a committed Council, the strong economic growth of the Bathurst Region is set to continue.



Cr Graeme Hanger OAM

Mayor of Bathurst



Executive Summary

The Economic Development Strategy 2018-2022 has been developed with extensive business community consultation undertaken by the Western Research Institute and rigorous economic analysis carried out by Balmoral Group Australia, incorporating the latest census data from 2016 which was fully released in December 2017.

The Economic Development Strategy 2018-2022 provides a guiding framework for Bathurst Regional Council and the community, to drive economic growth. The purpose of the Strategy is to drive vigorous and sustainable economic development and recognises the need for collaborative effort across all levels of government, the community, and not-for-profit groups to achieve the objectives of the Strategy.

Through the process of preparing this strategy an economic vision for the region was developed:

“A pioneering, adaptable economic hub that celebrates the region’s rich diversity, culture, skills and history, yet nourishes innovative, nimble industries and professionals of the future.”

The objectives of the Strategy (and therefore how the Strategy will be actioned by Council and its partners) will be to:

- Set a clear direction for the region for the next four years to support the Bathurst community in achieving its priorities in terms of economic growth;
- Drive Council’s activities and programs in the economic development space;
- Properly interpret, represent and transform the feedback gathered from the community consultation process into an actionable economic framework for the Bathurst Region;
- Work in synergy with other Council strategies and regional plans produced by its key partners, rather than replicate or counteract their objectives; and
- Set achievable targets in the **Economic Activation Plan**

There is a range of Economic Enablers that Council can action to encourage and support economic development in the Bathurst Region. Areas in which Council is able to lead and influence in the development of a dynamic business environment include:

1. Infrastructure
2. Planning
3. Regional Branding, Marketing and Tourism
4. Networks and Partnerships
5. Local Employment
6. Smart City Development

The Economic Development Strategy has a number of interdependent factors, many of these are foundational, which requires a ‘whole of organisation’ approach to be embraced by Council in order to effectively implement the Strategy. Council’s Economic Development section plays a key role in facilitating cross-functional and cross-organisational relationships to enable successful economic development across foundational economic factors. While the Economic Development Strategy is recognised as a ‘whole of organisation’ approach, the activities of the Economic Development section are guided by the Strategy.

Vision for 2022

A pioneering, adaptable economic hub that celebrates the region's rich diversity, culture, skills and history, yet nourishes innovative, nimble industries and professionals of the future.



45,986 Population¹

A 5.7% increase from 2018 to 2022,
or 2,486 new residents



\$2.25 Billion Gross Regional Product²

An increase of \$103M on 2018



20,510 Local Jobs³

A 4% increase or 800 new jobs
compared to 2018

¹Source: NSW Planning and Environment 2016 New South Wales State and Local Government Area Population and Household Projections, and Implied Dwelling Requirements

²Profile ID: Calculated using 10 year averages

³Profile ID: Calculated using 10 year averages

The Strategy

Why is an Economic Development Strategy needed?

The NSW Government's Economic Development for Regional NSW 2015 report defines regional economic development as "growing the regional economy through industry output or revenue, growing jobs and businesses and growing productivity."

The Economic Development Strategy 2018-2022 is needed to provide a guiding framework for Bathurst Regional Council and the community to drive economic growth. The purpose of the Strategy is to drive vigorous and sustainable economic development and to recognise the need for a collaborative effort across all levels of government, the community, and not-for-profit groups to achieve economic prosperity.

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- Set a clear direction for the region for the next four years to support the Bathurst community in achieving its priorities in terms of economic growth;
- Drive Council's activities and programs in the economic development space;
- Properly interpret, represent and transform the feedback gathered from the community consultation process into an actionable economic framework for the Bathurst Region;
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- Set achievable targets in the Economic Activation Plan

The Strategy is not only linked to other plans developed by Council, it is also tied to relevant State and Federal plans, and also strategies developed by community partners. This approach demonstrates that successful economic development cannot occur in isolation, a view that is shared by the World Bank:

"Local economic development (LED) offers local government, the private and not-for-profit sectors, and local communities the opportunity to work together to improve the local economy. It also incorporates many local government and private sector functions including environmental planning, business development, infrastructure provision, real estate development and finance."

The Strategy sets a clear direction and purpose of how Council and the community will achieve its vision of

becoming "A pioneering, adaptable economic hub that celebrates the region's rich diversity, culture, skills and history, yet nourishes innovative, nimble industries and professionals of the future."

While economic development is typically measured in terms of employment and GRP (Gross Regional Product), it also includes improvements in education, socioeconomic standards, culture, health, and environmental sustainability. Therefore, the vision recognises the interplay between economic, environmental, social and cultural facets.

'The purpose of the Strategy is to drive vigorous and sustainable economic growth and to recognise the need for a collaborative effort across all levels of government, the community, and not-for-profit groups to achieve economic prosperity.'

The Strategy also recognises that:

- 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 Bathurst Region;
- The education sector is a key cornerstone of the region's competitiveness and future. Preparing young people for a global economy and upskilling the professional workforce will enable our workforce and companies to respond to complex problems, be more specialised, productive and innovative. It is essential that this industry is supported and enhanced.
- Food manufacturing and agriculture have traditionally underpinned the success of the Bathurst economy. The global economy continues to place pressure on these sectors and change is needed through collaboration, supply chain development and innovation.
- The retail sector plays an important role in the region's economy by preventing the leakage of money out of the area, attracts visitation and enhances the image of the Region.
- The economic growth of the Bathurst Region will result in benefits not only to the Bathurst LGA, but the Central West, NSW and Australia.
- By enhancing the quality of living by including active recreation spaces and ensuring provision of an array of services and facilities, the region will attract talented and creative people.
- The Bathurst Region should enhance its investment and business relocation potential as the closest 'Smart City' to Sydney. This will require the

provision of technological infrastructure, upskilling of the workforce and the growth of the technology sector.

- Strategic partnerships and collaboration underpin the success of the Strategy.
- The recognition and importance of heritage and the role it plays as an economic asset.
- The provisioning of support for the new Destination Brand.
- The Bathurst Region's ability to assist in relieving the population pressures, and therefore, infrastructure and service pressures faced by metropolitan areas such as Sydney, Newcastle and Wollongong.

'The Regional Australia Institute has ranked Bathurst 15th nationally out of 563 LGAs for 'Local Economic Development Support' and 4th in New South Wales from 152 LGAs.'

Council's Role In Achieving the Vision

The approaches taken to facilitate and promote local economic development differ between Councils according to local circumstances. Bathurst Regional Council recognises that it is ideally placed to act as a community leader and coordinator of economic development, embracing the role as an advocate, facilitator, coordinator and service provider to lead and enable continued economic prosperity, infrastructure, innovation, investment, job generation, business relocation and new enterprise development.

Local government plays an integral role in the economic growth and prosperity of their communities. In 2013, the South Australian Centre for Economic Studies completed a report into the role of councils in economic stimulus and economic development. The report had the following conclusions:

"It is important that local governments promote local economic development because it is integral to the achievement of the core purpose and objective of local governments – to build and enhance community development. They have the power to make their localities attractive places to invest in as well as live and work in, they can use their land use planning strategically to attract new business investment and can use a wide variety of other measures to stimulate additional investment by existing businesses and new business start-ups. By planning strategically, local governments can substantially enhance local economic performance and local economic prosperity." ["Promoting Local Economic Development: A role for metropolitan Local Councils", 2013]

This view is shared by the Australian Local Government Association;

"Local Government plays a critical role in the Australian economy. It is uniquely positioned to meet the needs of Australians and to enhance national productivity and economic growth." (Local Government's Plan for an Innovative and Prosperous Australia, 2016).

The Strategy recognises that the success of any economic development program depends entirely on the willingness of all stakeholders (community, industry and government) to work together towards achieving the shared vision and objectives outlined in the Strategy. However, the Strategy also recognises that Council is effectively resourced and positioned to lead the process.

Economic Enablers

There is a range of Economic Enablers that Council can action to encourage and support economic development in the Bathurst Region.

Areas in which Council is able to lead and influence in the development of a dynamic business environment include:

- **Infrastructure:** Infrastructure underpins economic activity and is fundamental to an effective and efficient economy. Council in its role as coordinator has a key responsibility to ensure that hard and soft infrastructure requirements are addressed and maintained. Additionally, Council is able to undertake strategic infrastructure development and expansion of key business parks and precincts;
- **Planning:** Development of an efficient and streamlined local development approvals process and regulatory environment. Council can also facilitate local strategic planning and development investigations (eg land use strategies) and protection of local heritage as an economic asset;
- **Regional branding, marketing & tourism:** Strategic marketing, promotion and events to attract, encourage investment, relocation and visitation in partnership with government agencies, peak bodies and private providers. Tourism potential can be further enhanced through the creation of a consistently applied Destination Brand;
- **Networks and partnerships:** Nurture entrepreneurship, partnerships and skill development through business programs and workshops;
- **Local employment:** Development of programs that reduce local unemployment and create new jobs;

- **Smart City development:** Lead the development of an urban development vision to integrate Information and Communication Technology (ICT) and the Internet of Things (IOT) technology in a secure fashion to manage Bathurst's assets. Develop a Smart Cities Plan to guide Bathurst to become a more productive, accessible, liveable city that attracts talent, encourages innovation, creates jobs and is well positioned to integrate emerging technologies into everyday life.

Through the implementation of the Economic Enablers and the Economic Development Strategy, the following outcomes can be achieved:

- Enhanced local business skills
- Jobs growth
- Clear articulation of the Region's strengths
- New infrastructure to enable economic growth
- Clearly identified regional priorities
- Improved business-to-business networks
- Enhanced quality of life
- New business relocations and industry investment
- Local consumer confidence

GENERATES

- Population growth
- GDP growth
- Reduced unemployment
- Improved median incomes
- Improved awareness and visitation
- Stable local business
- Business diversity
- **ECONOMIC STRENGTH**

Delivery and Reporting

It is important to track the progress and effectiveness of strategies in moving towards an established vision. The Economic Development Strategy 2018-2022 identifies measures for determining whether objectives are being achieved in the Activation Plan. The Activation Plan supports the ongoing requirement for an 'End-of-Year Report' to be submitted to Council to track the rollout of the Strategy. The Economic Development Strategy has also been developed as part of an ongoing process of community engagement in planning for the ongoing economic prosperity of the Bathurst Region.



Resourcing the Strategy

The Economic Development Strategy has a number of interdependent factors, many of these foundational, which requires a 'whole of organisation' approach to be embraced by Council in order to effectively implement the Strategy. While Council portfolios are organised along lines of managerial accountability, the economic development of the Bathurst Region is dependent on a range of foundational factors, including planning, infrastructure, property development, tourism, regional marketing, business attraction and development, and other factors that fall across the various organisational portfolios of Council. An effective Economic Development Strategy will need to take these factors into consideration and be implemented by the whole of the organisation.

Council's Economic Development section plays a key role in facilitating cross-functional and cross-organisational relationships to enable successful economic development across foundational economic factors. Examples include the proper communication and support for state and federal funding opportunities to the appropriate sections



of Council, capacity-building for Council-owned assets (public Wi-Fi access, aerodrome development, Mount Panorama, leasing of Council property to new businesses) and bridging new business enquiries with town planners. While the Economic Development Strategy is recognised as a 'whole of organisation' approach, the activities of the Economic Development section are guided by the Strategy. They are responsible for activating local business development, actively attracting new businesses to the Region, and furthering the development of economic infrastructure. The Economic Development section is also primarily tasked with overseeing the implementation of the Activation Plan, to generate the required relationships to enable the Strategy and to report rollout progress back to Council.

The below matrix demonstrates how economic development is managed at Bathurst Regional Council. It correlates the Economic Enablers listed on page 8 of this document with the various departments of Council and demonstrates the shared responsibility for Economic Development across Council.

COUNCIL ECONOMIC ENABLERS	COUNCIL DEPARTMENTS			
	Environmental, Planning & Building	Engineering	Cultural & Community	Corporate Services & Finance
Infrastructure	✓	✓	✓	✓
Planning	✓	✓		
Regional branding, marketing & tourism	✓		✓	✓
Networks & partnerships	✓	✓	✓	✓
Local employment	✓	✓	✓	✓
Smart City development	✓	✓	✓	✓

Methodology & Engagement

Bathurst, one of the fastest growing inland regions in NSW is located only 2.5 hours from the state capital, Sydney.

The Bathurst Region is home to over 42,900 (ABS 2017) residents and growing at a rate of 1.4% over the past five years. Population forecasts predict the region to grow by 24% to 52,500 by the year 2031 (Department of Planning & Environment 2016).

The Economic Development Strategy 2018-2022 presents a tool by which the Council, in partnership with industry and the community, can take a coordinated approach to retaining and growing the existing economic base of the Region, as well as attracting new investment.

The Western Research Institute (WRI) was engaged to undertake a range of community engagement and research activities to assist Council's strategy development. The outputs of these activities have

provided Council with a strong understanding of the current strategic documentation impacting economic development in the region, a thorough understanding of community feedback on the priorities and actions needed to develop the local economy, and a number of proposed actions that can be utilised in the Economic Development Strategy 2018-2022 including:

- A socioeconomic profile of the Bathurst Region.
- A review of strategic documentation developed by Council and other stakeholder organisations that have a bearing on the future economic development of the region.
- Four community engagement forums.
- A short survey, developed to gather feedback from the Bathurst business community and the wider community.
- An analysis of the information gathered from community engagement with input from relevant strategic documentation.

Socioeconomic Profile of the Bathurst Local Government Area

A socioeconomic profile of the Bathurst Local Government Area (LGA) was developed in order to provide a fact base to discussions on the local economy throughout the engagement process. The profile considered a range of economic and social factors, including:

- Gross Regional Product and key sectors including sectoral employment
- Count of businesses
- Tourism
- Average income by occupation
- Unemployment
- Educational characteristics of the community
- Age profile and age dependency ratios
- Population projections
- Median personal and household incomes
- Housing affordability

Review of Strategic Documentation

Over recent years, Council has generated a range of strategic documentation regarding different aspects of its operations. The principal strategic document is the Bathurst 2036 Community Strategic Plan. Community Strategic Plans (CSPs) represent the highest level of strategic planning undertaken by a local council. The Office of Local Government advise that all other plans developed by councils as part of the Integrated Planning and Reporting Framework must reflect and support the implementation of the CSP.

Council's other relevant strategic documentation, and strategy's developed by key community stakeholders, were analysed to understand the necessary inputs for Council's Economic Development Strategy. Strategic documentation was summarised and a matrix was developed highlighting how these documents align with the economic development priorities set out in the Bathurst 2036 Community Strategic Plan.

Community Engagement Forums

Four community forums were held to gather community feedback on the Economic Development Strategy. Two of these forums were aimed at the general business population, one smaller forum was held to gather feedback from a range of Not-for-Profit and government stakeholders and another forum was held for a group of select business leaders, to incorporate a more high level and strategic viewpoint from leading business people in the community.

The community forums were successful in delivering some interesting and informative feedback. Approximately 100 people attended these forums.

Survey

A short survey was developed to gather feedback from the Bathurst business community and the wider community, to ensure that all interested persons were able to provide feedback to inform the development of the Economic Development Strategy. The survey contained a range of questions designed to elicit information on the strengths and weaknesses of the Bathurst economy and to understand views on how Council could assist future economic growth. Questions were also included that asked respondents to rank the importance of the seven economic development goals highlighted in the 2036 Community Strategic Plan and also to rank Council's performance in achieving these goals.

The survey was promoted widely, through paid and unpaid Facebook advertisements and updates, articles in the local paper and through direct emails to forum attendees and the wider Council business contact list. Surveys were completed by 44 individuals. Whilst this number does not provide a statistically significant response to the survey questions, it does add to the feedback gathered through engagement forums and provided an opportunity for interested community members to add their ideas to the development of the Strategy.

Thematic Analysis

A thematic analysis was undertaken of engagement feedback to understand the main themes provided by the community. A good deal of high level feedback was provided across community forums and the survey, including a range of interesting, achievable and sometimes aspirational ideas. These themes were condensed and filtered to remove the obviously unrealistic, less popular ideas and issues well out of the scope of the Economic Development Strategy.

Methodology Process

Inception & Research

Meetings with key Council stakeholders, EOI process and engagement of a consultant.

Community Consultation

Business, Government & not-for-profit forums, socioeconomic analysis, business surveys, literature reviews, thematic analysis.

Draft Economic Development Strategy

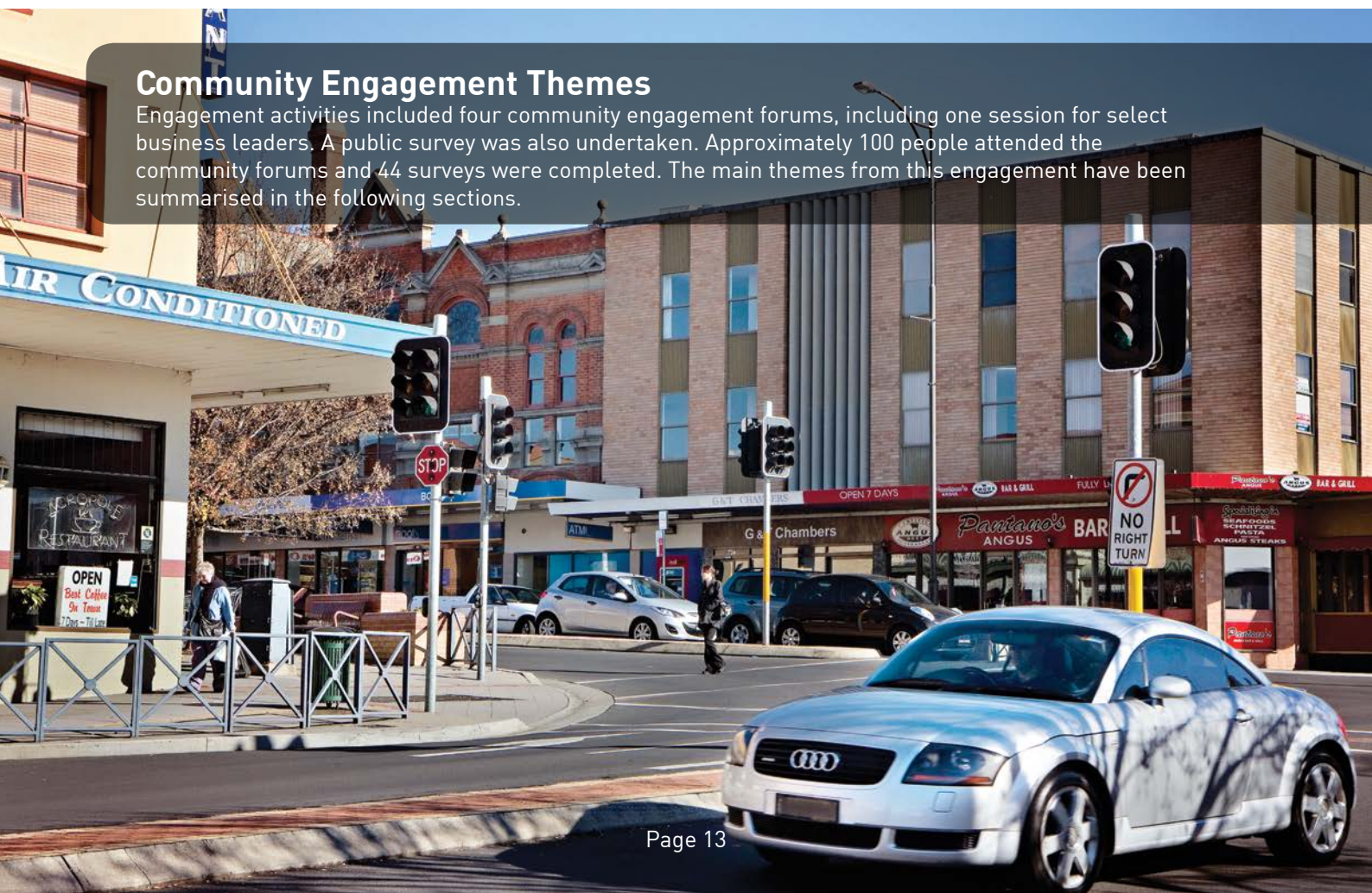
Final consultant report (community consultation) submitted & approved, draft strategy reviewed by senior Council staff.

Public Exhibition & Final Strategy Adoption

Strategy placed on exhibition for community feedback, submissions received and feedback considered, adoption of Strategy by Council.

Community Engagement Themes

Engagement activities included four community engagement forums, including one session for select business leaders. A public survey was also undertaken. Approximately 100 people attended the community forums and 44 surveys were completed. The main themes from this engagement have been summarised in the following sections.



SWOT Analysis

STRENGTHS

- Education sector
- Health services
- Lifestyle
- Geographical position
- Infrastructure & facilities
- Heritage background
- Affordability
- Population profile
- Robust economy

OPPORTUNITIES

- Heritage
- Tourism
- IT & communications
- Infrastructure
- Regional branding
- Sectors - mining, professional services, IT, education, care services, agriculture, manufacturing
- Affordable land
- Streamline planning
- Attracting businesses
- Attracting/retaining people & skills
- Agricultural diversification (warmer climate)

WEAKNESS

- Specialist health services
- Business culture
- IT & communications
- Sectors - professional services
- Retail rental cost
- Outside perceptions of local liveability & lifestyle
- Skills - IT, engineering, professional services, care
- Planning
- Transport
- Economic diversification
- Social issues

THREATS

- Managing growth vs lifestyle & environment
- Transport
- Car parking
- Energy cost
- Competition for investment dollars with other regions
- Skills shortage
- Regulation & red tape
- Major local businesses shrinking
- Climate change

Key Strengths:

- Infrastructure and facilities – Bathurst has a diverse range of cultural, economic and sporting infrastructure. The provision of national (and international) standard facilities is a priority for Bathurst Regional Council, as is the drive for maximised use.
- Population profile – The largest portion of the population in Bathurst LGA is 20-24 year olds and the second largest is 15-19 year olds. Compared to NSW, 25-34 year olds make up a smaller percentage of the population. However, the other age groups are comparable to NSW.
- Affordability – The Bathurst housing market is viewed as an affordable alternative to metro city living, an advantage that Bathurst is able to capitalise on for continued population growth.

Key Weaknesses:

- Bathurst LGA identified a weakness in IT, engineering, professional services and care services skills. This may be overcome due to the presence of extensive educational infrastructure. Vocational programs can be developed to fill this gap.

Key Opportunities:

- Mining is a potential opportunity sector – According to the New South Wales Government Resources and Energy Department, the region is poorly explored for copper and gold and there is an opportunity for much more excavation⁴.
- Agriculture as a potential opportunity sector – While Bathurst may have a competitive advantage in agriculture due to location, it is a decreasing industry in terms of production and employment, and will continue to diminish in size (even if not as fast as surrounding areas).
- Diversification in agricultural production – Opportunity to explore new produce due to changing climate conditions.

Key Threats:

- Reduction in the number of operating small businesses – Threats posed to traditional small business models due to online shopping, skill shortages and operational cost increases.
- Impact of climate change – Threats to primary production resulting from drier soil moisture content and constraints placed on conventional agriculture. Also threats to water security.



⁴<http://www.resourcesandenergy.nsw.gov.au/miners-and-explorers/geoscience-information/nsw-geology-overview/commodities>

Key Community Themes

	Engagement Feedback	Strategic Alignment
Business Development	<p>Re-Investing in Council Activities</p> <p>Feedback highlighted support for a number of business growth and development activities currently being undertaken by Council. Feedback suggests that Council should continue the following activities or invest further in them.</p> <ul style="list-style-type: none"> Invest in Council's series of business related events and training. These events received significant support and provided information and training to local businesses, allowing them to network and share ideas. Provide active support to business start-ups and creative spaces that allow ideas/businesses to develop. 	<p>2036 Community Strategic Plan</p> <ul style="list-style-type: none"> To attract employment, generate investment, strengthen and attract new economic development opportunities To facilitate and foster partnerships, networks and infrastructure to support and attract knowledge, innovation and research <p>Digital Economy Strategy 2013</p> <ul style="list-style-type: none"> Expanding the technology sector Economic diversification <p>Bathurst Manufacturing Study 2015</p> <ul style="list-style-type: none"> Council to become a business network and information hub
	<p>Skills Partnerships</p> <p>Council currently engages with many local institutions and plays an important role as a facilitator and connector. It has been suggested that Council become more involved in developing the local skill base by connecting people and organisations.</p> <ul style="list-style-type: none"> CSU could be utilised to greater local benefit. Increased engagement between CSU and local businesses could result in reducing skill gaps within particular industries and drive innovation. The business community has also recognised other educational providers in Bathurst (such as TAFE) as potential education partners. Council to act as a facilitator to allow industry to engage with CSU and other educational organisations to provide a vital link between students/graduates and businesses who may be looking to take on interns, work experience students or recent graduates. Gunther's Lane experiential technology hub has massive potential to bring together individuals, skills, technology and organisations for the benefit of the local economy. If Council were to bring other organisations, including CSU, into the discussion of how to best utilise this and other local resources (such as CSU's first class engineering school) there is huge potential to solve/alleviate local skills issues and build new and exciting businesses. 	<p>Bathurst Manufacturing Study 2015</p> <p>Investing in skills</p> <p>Central West and Orana Regional Plan 2017</p> <ul style="list-style-type: none"> Direction 6: Expand education and training opportunities Direction 10: Promote business and industrial activities in employment lands <p>Digital Economy Strategy</p> <ul style="list-style-type: none"> Expanding the technology sector Economic diversification <p>Economic Development Strategy for Regional NSW</p> <ul style="list-style-type: none"> Goal 2 - Drive regional employment and regional business growth

Engagement Feedback

Regional Branding and Marketing

Branding and marketing the region's assets and opportunities is viewed as a key element to developing the local economy.

- Support and recognition of the Bathurst Region Destination Management Plan.
- Development of a Bathurst Business Destination Management Plan. A document that clearly understands and articulates the needs of new businesses and develops a plan to market the region to these businesses.
- Community engagement highlighted that there are many individuals and businesses developing interesting new products and utilising cutting edge technologies. By telling and marketing these stories, the region could be positioned as an industry hub, with the aim of attracting like businesses to the region.

Business Packages

Explore the potential for developing business attraction packages. Business attraction packages were raised as an attractive way for Council to bring new businesses to the region.

NBN

A strong area of agreement amongst forum attendees related to the need for better internet connectivity through the NBN. Previous research undertaken on this issue has found that 'the lack of, or insufficient, internet connection was the number one barrier preventing businesses expanding their online presence and maximising their leverage of the digital economy' (Digital Economy Strategy 2013).

- Council could investigate further investment into NBN infrastructure available for businesses.

Second Circuit at Mount Panorama

Council is in the process of developing its plans for the Second Circuit Project. This project received support from the community as a means of attracting businesses and people to the region. The Second Circuit will invest and build on the assets already in place on Mount Panorama and works toward a key tourism strength for Bathurst – motorsport. All support should be provided for this project to assist economic development and business attraction.

Strategic Alignment

2036 Community Strategic Plan

- To attract employment, generate investment, strengthen and attract new economic development opportunities
- To market Bathurst as a great place to live, work, study, invest and play
- To facilitate and foster partnerships, networks and infrastructure to support and attract knowledge, innovation and research
- To support infrastructure development necessary to enhance Bathurst's lifestyle and industry development

Destination Management Plan 2015

- Improved brand awareness, preference and intention in key target markets
- Increased number of sustainable tourism jobs
- Increased investment in tourism product and infrastructure in the region

2036 Community Strategic Plan

- To support infrastructure development necessary to enhance Bathurst's lifestyle and industry development

Economic Development Strategy for Regional NSW

- Invest in economic infrastructure & connectivity

Regional Development Australia Central West - Telecommunications Infrastructure Support Guide**Digital Economy Strategy 2013**

- Expanding the technology sector
- Teleworking/home based digital business promotion

Central West and Orana Regional Plan 2017

- 10.5 Monitor the supply and demand of industrial land in strategic centres to inform the planning and coordination of utility infrastructure to support new development
- Direction 21: Coordinate utility infrastructure investment
- 21.3 Monitor development and ensure that infrastructure is responsive to investment opportunities

Key Opportunity Sectors Arising from Community Engagement

- **Agriculture (value adding):** This sector is recognised as an area of interest and importance for the Central West region, with the potential to develop on local produce and skills to drive value adding processes.
- **Advanced manufacturing:** Building on the strong local manufacturing sector, developing advanced manufacturing will require fewer low-skilled positions and more specialised and higher skilled roles.
- **Disability and aged care:** Feedback suggests that the human services sector will be one of, if not the, largest growing sectors in the Australian economy. Developing this sector in the regional economy will likely deliver significant economic development results for the local economy.
- **Education:** Developing Bathurst's education assets holds promise as a means of maintaining a diversified economy and addressing local skills shortages, at the same time as developing the skills needed to drive innovation.
- **Information technology:** The information technology sector and the digital economy have risen to form a major part of modern economies.
- **Tourism:** The tourism sector is increasingly being recognised as a powerful job creator and a significant part of regional economies. Council is addressing this sector under its Bathurst Region Destination Management Plan, to continue the development of this industry.
- **Professional services:** The professional, scientific and technical services sector (including legal, accounting, architecture, engineering and associated services) has significant opportunity to expand in the region. Opportunities exist to replace imported professional services and to make better utilisation of technology.

Survey Findings

The targeted participants of the survey were residents and businesses within the Bathurst LGA. **Figure 10** shows the breakdown of survey participants. The majority of respondents were businesses.

Figure 10: Survey Participants

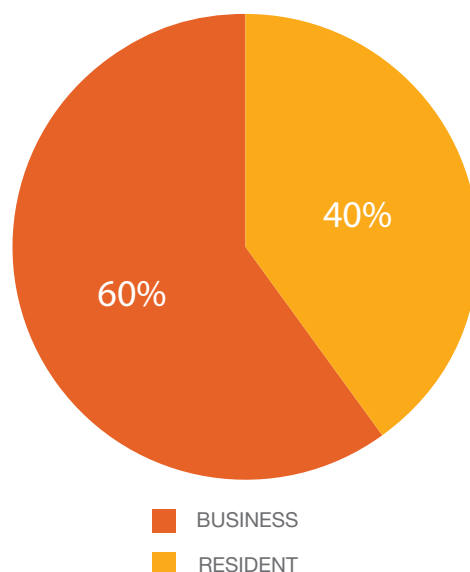
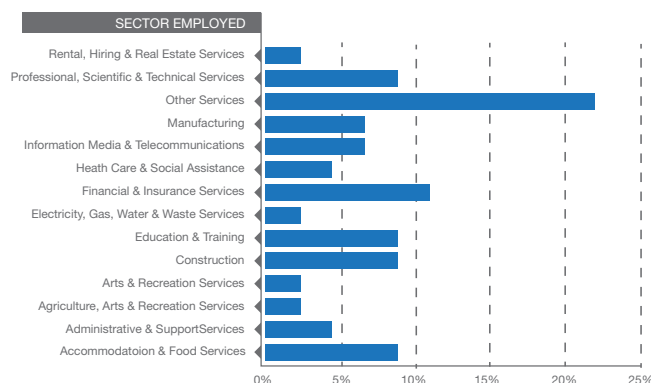


Figure 11 shows the breakdown of survey participants by employment. Over 20% of respondents were employed in 'other services' not listed as an option. Around 11% of respondents were employed by the finance and insurance services sector and professional scientific and technical services, education and training, construction and accommodation and food services each made up 9% of the employment of survey participants.

Figure 11: Employment of Survey Participants

Source: Bathurst Regional Council Survey



Of the top barriers to entry in Bathurst, survey respondents indicated infrastructure such as internet and transportation as a key issue. Another concern voiced was high rental costs.

The Bathurst 2036 Community Strategic Plan sets out seven economic development goals for the Bathurst region, the survey asked respondents to rate how well Bathurst is doing to achieve these goals on a scale of 1 to 10, with 1 being very poor and 10 very well.

Respondents felt that **Goal 1 (See Appendix, Figure 1)**, to attract employment, generate investment, strengthen and attract new economic development opportunities, is on average doing very well with 71% of respondents indicating a ranking above 6.

Goal 2, (Appendix Figure 2) to encourage, promote and protect the region's primary resources, was not perceived by respondents as being achieved with 42% of respondents indicating a ranking equal to or below 5.

Goal 3, (Appendix Figure 3) to protect a vibrant CBD and support and grow retail diversity, was perceived as doing well with nearly 70% of respondents indicating a ranking of 6 or higher and 25% indicating 8 or higher.

Goal 4, (Appendix Figure 4) to market Bathurst as a great place to live, work, study, invest and play, had a very positive response with 80% ranking 5 or above.

Goal 5 (Appendix Figure 5) to facilitate and foster partnerships, networks and infrastructure to support and attract knowledge, innovation and research was also perceived very well with 71% of respondents indicating a ranking above 6.

Goal 6 (Appendix Figure 6) to support infrastructure development, necessary to enhance Bathurst's lifestyle and industry development received a positive response with 62% of respondents selecting 6 or above.

Goal 7 (Appendix Figure 7) to support integrated transport infrastructure development was perceived as being the lowest achieved goal with 48% indicating a ranking of 5 or below.

Strategic Linkages Matrix

The development of the Economic Development Strategy 2018-2022 has been informed by relevant, existing strategic documentation to ensure that it will take into account previous strategic work undertaken by Council and other relevant stakeholder organisations.

Analysis of the various strategies has revealed that Council has a proliferation of goals and visions that are not fully aligned. These strategies and plans have areas of consensus and overlap. The Economic Development Strategy 2018-2022 aims to build on previous work.

At the inception of this community engagement project, an agreed aim of the project was to undertake an analysis of the strategic documentation and highlight its alignment against the existing economic development priorities set out in the Bathurst 2036 Community Strategic Plan.

The Bathurst 2036 Community Strategic Plan contains four priorities being economic prosperity, liveable communities, environmental sustainability and sound leadership. Council's Economic Development Matrix on the following page (page 20) highlights the contribution of each strategic document to the economic development objectives set out in the Bathurst 2036 Community Strategic Plan. The CSP identifies 7 economic development objectives:

1. To attract employment, generate investment, strengthen and attract new economic development opportunities
2. To encourage, promote and protect the region's primary resources
3. To protect a vibrant CBD and support and grow retail diversity
4. To market Bathurst as a great place to live, work, study, invest and play
5. To facilitate and foster partnerships, networks and infrastructure to support and attract knowledge, innovation and research
6. To support infrastructure development necessary to enhance Bathurst's lifestyle and industry development
7. To support integrated transport infrastructure development

While the Economic Development Strategy 2018 – 2022 recognises and supports the achievement of the above objectives as they currently exist, the Economic Development Strategy has developed an updated set of objectives (formed around the Economic Enablers) that will inform the development of the next iteration of the Community Strategic Plan.

Where each listed strategic document assists the achievement of the existing CSP objectives, a tick has been placed against the goal in the matrix.

Strategic Linkages Matrix

1 BATHURST REGIONAL COUNCIL STRATEGIC DOCUMENTS							
BATHURST 2036 COMMUNITY STRATEGIC PLAN	To attract employment, generate investment, strengthen & attract new economic development opportunities	To encourage, promote & protect the region's primary resources	To protect a vibrant CBD & support & grow retail diversity	To market Bathurst as a great place to live, work, study, invest & play	To facilitate & foster partnerships, networks & infrastructure to support & attract knowledge, innovation & research	To support infrastructure development necessary to enhance Bathurst's lifestyle & industry development	To support integrated transport infrastructure development
Bathurst Region Destination Management Plan	✓		✓	✓	✓		
Bathurst Manufacturing Study	✓			✓	✓	✓	✓
Bathurst Digital Economic Strategy	✓			✓	✓	✓	
Urban Strategy	✓		✓	✓		✓	
Rural Strategy	✓	✓					
Village Plans				✓		✓	✓
Bathurst CBD & Bulky Goods Business Development Strategy	✓		✓			✓	
Cultural Vision	✓		✓	✓	✓	✓	
Heritage Strategy	✓		✓	✓		✓	

BATHURST 2036 COMMUNITY STRATEGIC PLAN	To attract employment, generate investment, strengthen & attract new economic development opportunities	To encourage, promote & protect the region's primary resources	To protect a vibrant CBD & support & grow retail diversity	To market Bathurst as a great place to live, work, study, invest & play	To facilitate & foster partnerships, networks & infrastructure to support & attract knowledge, innovation & research	To support infrastructure development necessary to enhance Bathurst's lifestyle & Industry development	To support integrated transport infrastructure development
Central West & Orana Regional Plan	✓	✓	✓		✓	✓	✓
Economic Development Strategy for Regional NSW	✓	✓			✓	✓	✓
Regional Development Australia Central West - Investment Opportunities 2013	✓		✓			✓	✓
Regional Development Australia Central West - NSW Central West Export / Import Contribution Study	✓		✓	✓		✓	✓
Regional Development Australia Central West - NSW Central West Freight Study	✓						✓
Regional Development Australia Central West - Telecommunications Infrastructure Support Guide					✓	✓	
Regional Development Australia Central West - Value Adding to Agriculture	✓	✓			✓	✓	
Containerised Cargo Demand Assessment Central West NSW						✓	✓

Situational Analysis

Economic Indicators

A strong and diverse economy underpins the Bathurst community. Rather than having a concentration in one or two major industries, the region's economy is well structured and is spread across multiple industry sectors. This non-reliance on any specific sector ensures the community is buffered against major fluctuations in industry and reduces the impact of economic shocks.

Population Growth

As of June 2017, the Estimated Residential Population (ERP) of the Bathurst Region is 42,900 (ABS). The Bathurst Region is ranked as the 4th fastest growing regional centre in NSW, with an average annual growth of 1.4% (Department of Planning & Environment 2016).

Economic Production

The Bathurst Region's Gross Regional Product (GRP) was \$2.13 billion as of June 2017. From 2014 to 2016, the region experienced the strongest three consecutive years of growth that have ever been recorded by local economists. On average, GDP has grown by approximately 2.2% each year since 2010 (ID Consultants 2017).

Count of Businesses

There are 3,432 registered businesses in the Bathurst Region LGA with Construction (681), Agriculture (646), Rental, Hiring & Real Estate (314), Professional, Scientific & Technical Services (290) and Transport, Postal & Warehousing (192) as the largest industries by business count (ABR 2017).

Major Industries

The largest industries by value added contribution in the Bathurst LGA include Education & Training (\$205.3M), Manufacturing (\$186.2M), Health Care & Social Assistance (\$184.8M), Construction (\$178.4M) and Public Administration & Safety (\$168M).

Tourism

In 2016, 920,000 tourists visited the Bathurst Region (overnight and domestic day trips) with a total spend of \$227.1M generated in the local economy (Tourism Research Australia 2016).

Employment

There are 20,390 employed residents in the Bathurst LGA, and 19,515 local jobs. Average annual jobs growth over a 10 year period is approximately 1.3%. More than 50,000 people work in the wider region, providing a diverse employment pool. The largest industries in the Bathurst LGA by employment include Health Care & Social Assistance (2,011), Education & Training (1,810), Retail Trade (1,522), Construction (1,502) and Manufacturing (1,479). (ID Consultants 2017)

Unemployment

As of December 2017, the unemployment rate of the Bathurst Region was 3.54%, well below the regional NSW average of 5.29% and the NSW average of 4.8% (ABS 2017).

Real Estate

The median house price in the Bathurst LGA is \$404,439 and \$274,000 for units/townhouses as of June 2017. This is significantly below the NSW median house price of \$711,006, and drastically below the Sydney metropolitan median house price of \$1.02M (Hometrack 2017).

Skills and Education

Bathurst is supported by a strong education sector with over 60 institutions, employing over 2,000 residents. According to the 2016 Census, 48% of persons 15 years and over in Bathurst had attained some form of qualification with 16.1% of the population holding a Bachelor degree or higher.

Economic Snapshot

\$2.13 Billion

Gross Regional Product
NIER 2017

42,900

Population
ERP 2017

19,515 local jobs

2017

\$404,439

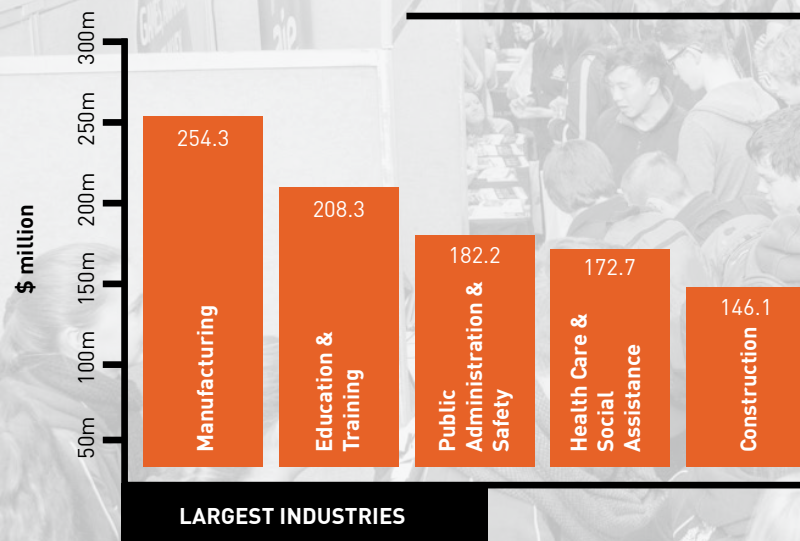
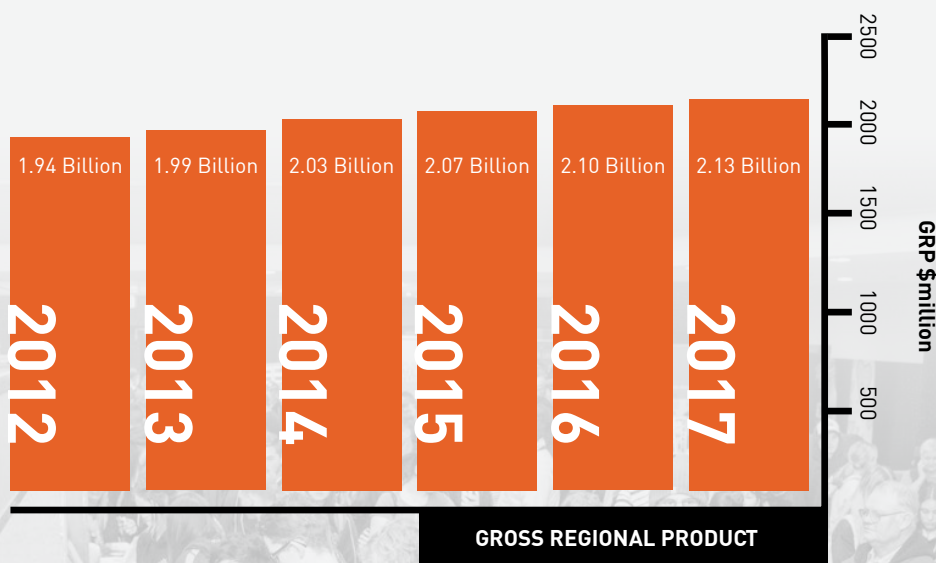
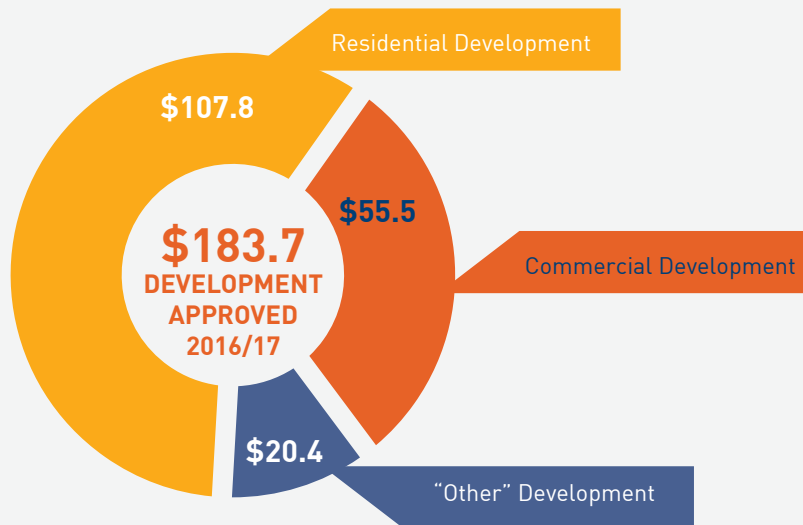
Median house price 2017

3,432

Registered Businesses
ABS 2017

3.54%

Unemployment Rate
ABS 2017



Demographic Overview - 2016 Census

At the heart of any labour force or employment pool is the demographic make-up of the community. Shifting changes in demographic structures ultimately shift the available human capital within a region. The 2016 Census provides key insights into these changes.

Table 1 describes the population in the Bathurst LGA compared to NSW. The median age of Bathurst residents is slightly lower than in the state overall. Older populations are typical of rural/regional communities, as the lure of a big city – in this case Sydney – pulls young residents away. However, this does not appear to be the case in Bathurst. The average household size in Bathurst is about the same as the state average, and both Bathurst and NSW have very similar proportion of males and females to the total population. People over the age of 60 also make up a similar proportion of the population in Bathurst as in NSW.

	Bathurst	NSW
Median age of persons	36	38
Proportion of males to total population	50.1%	49.3%
Proportion of females to total population	49.9%	50.7%
Over 60 as a proportion of total population	22.1%	21.8%
Average household size	2.4	2.6

Table 1: Population Statistics (2016) Source: ABS Data

Figure 3: Family Household Composition (2016)

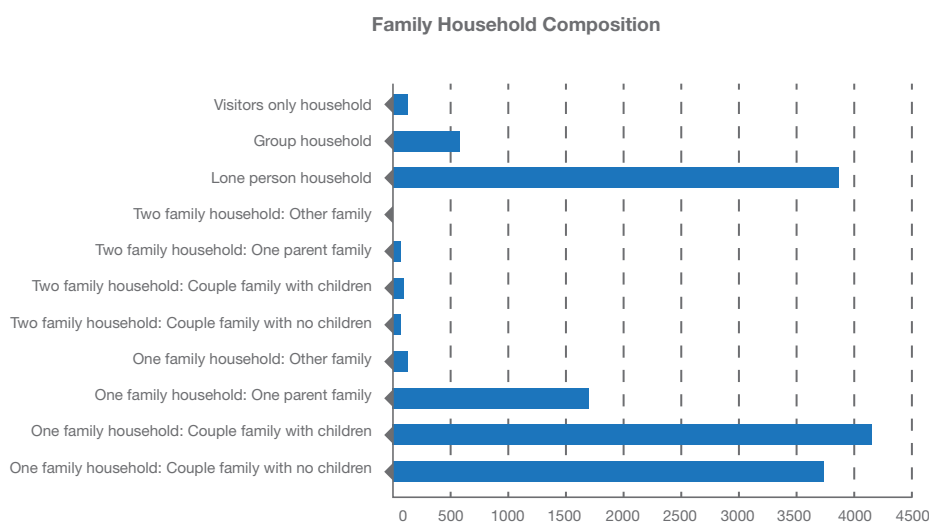


Figure 1: Bathurst Population by Age (2016) Source: ABS Data

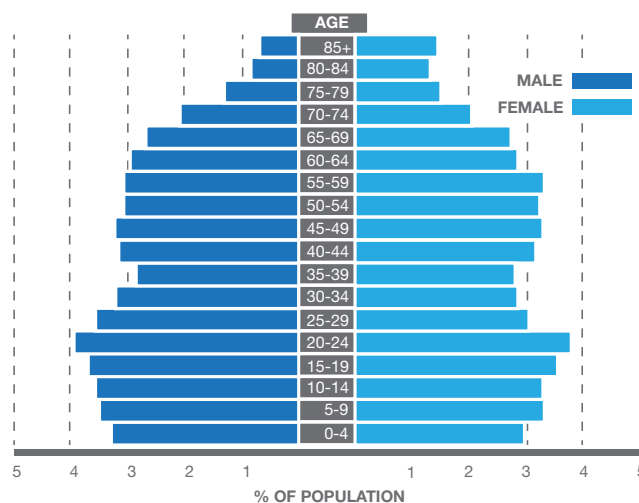


Figure 2: New South Wales Population by Age (2016)

Source: ABS Data

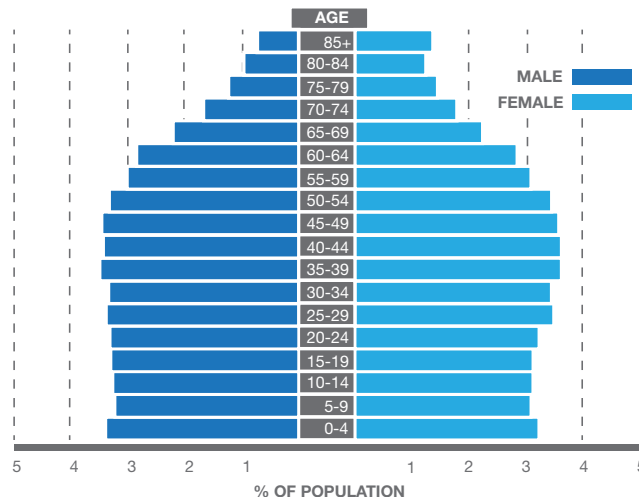


Figure 1 shows the age profile of Bathurst LGA. 20-24 year olds make up the largest percentage of Bathurst's population with 15-19 year olds following closely behind. The rest of the population is distributed fairly evenly across age groups.

Figure 2 shows the age distribution of the population of New South Wales. New South Wales has a more evenly distributed population than Bathurst but has similar proportions of people 64 and older.

Figure 3 shows household composition in Bathurst. It is clear that coupled partners with or without children and lone-person households represent the great majority of household types.

Table 2 shows that Bathurst's unemployment rate at the time of the 2016 Census (6%) was lower than the NSW average (6.3%). The participation rate in Bathurst (58.2%) was higher than in NSW (54.7%). Since higher participation rates are usually associated with periods of strong job growth, the economy in Bathurst in 2016 appears to be performing well compared with the NSW economy as a whole.

Table 2: Labour Force Statistics (2016) Source: ABS Data

Description	Bathurst (LGA)	NSW
Employer full time (number)	11,165	2,134,521
Employed part-time (number)	5,923	1,071,151
Unemployed (number)	1,162	225,546
Total labour force (number)	19,329	3,605,872
Unemployment rate (unemployed as a % of labour force)	6%	6.3%
Participation rate (labour force as a % of persons aged 15+)	58.2%	54.7%
Employed full time (as a % of total employed)	61.5%	63.1%
Employed part-time (as a % of total employed)	32.6%	31.7%

Figure 4 shows employment by industry as a percent of the total employment in 2016 for both Bathurst and New South Wales. Bathurst has a much greater percentage of its population in agriculture forestry and fishing, education and training, public administration and safety, manufacturing and electricity, gas, water and waste services than New South Wales. New South Wales has a much larger percentage of the population working in wholesale trade, professional, scientific and technical services and financial and insurance services than Bathurst.

Figure 4: Employment by Industry as a percent of the total (2016) Source: ABS Data

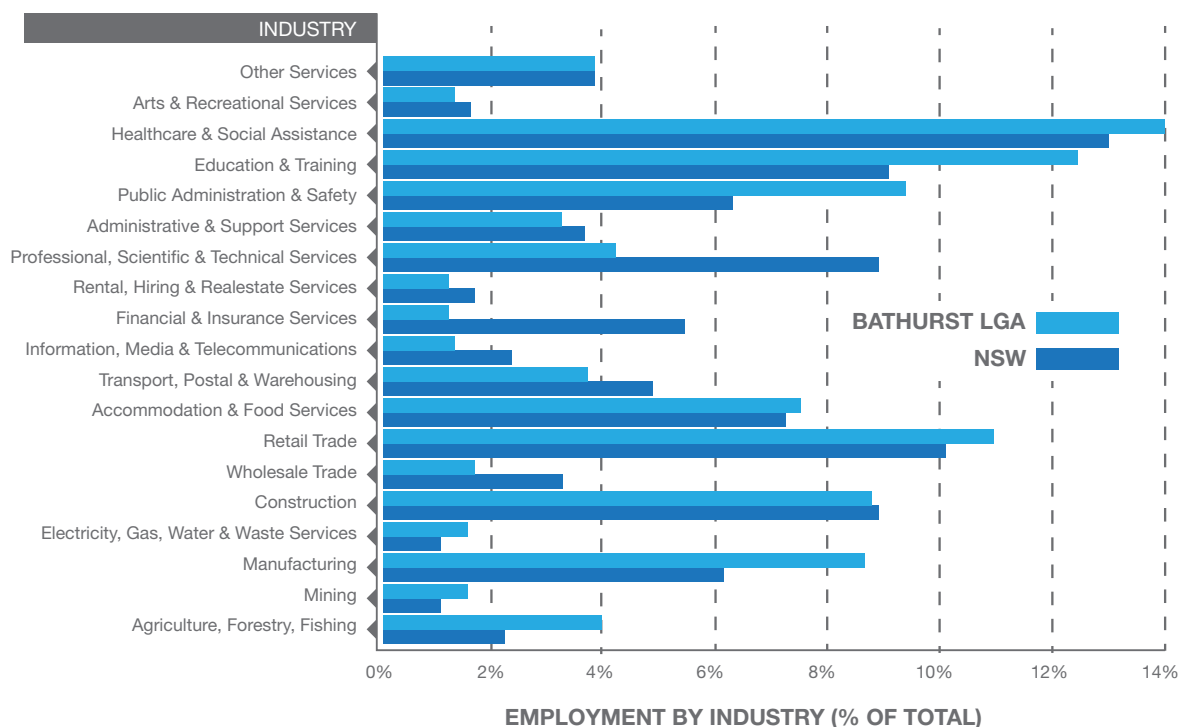
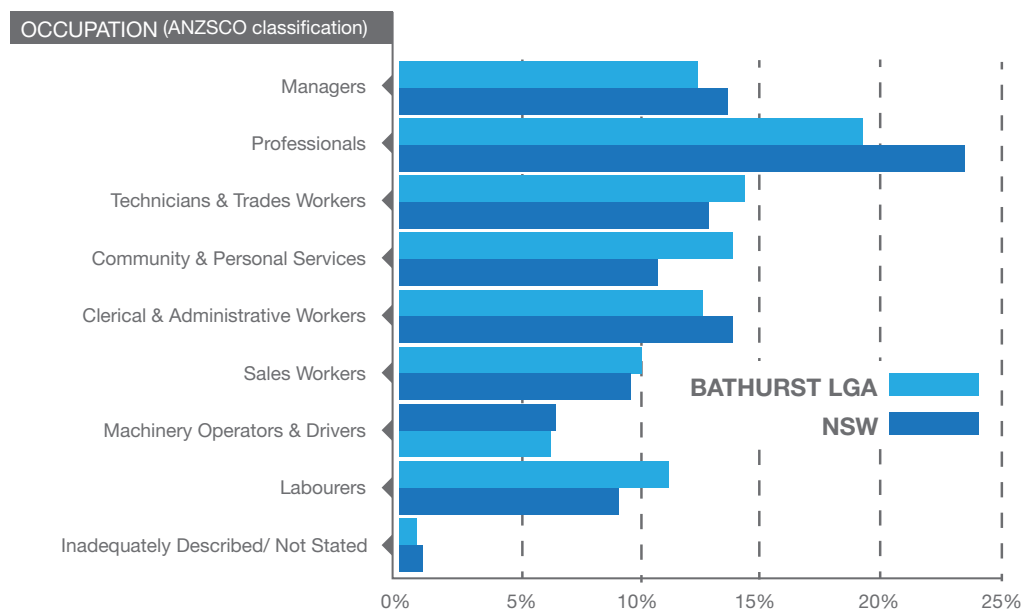


Figure 5 compares the relative share of workers in each occupation for Bathurst LGA and for NSW as a whole. In 2016, a greater proportion of workers in Bathurst were engaged as technicians and tradesmen, community and professional service, and labour workers than in the wider New South Wales region. The Bathurst LGA generally employs a comparable percentage of people as employed in NSW in most other occupations, excluding the professional category, where significantly fewer people are employed.

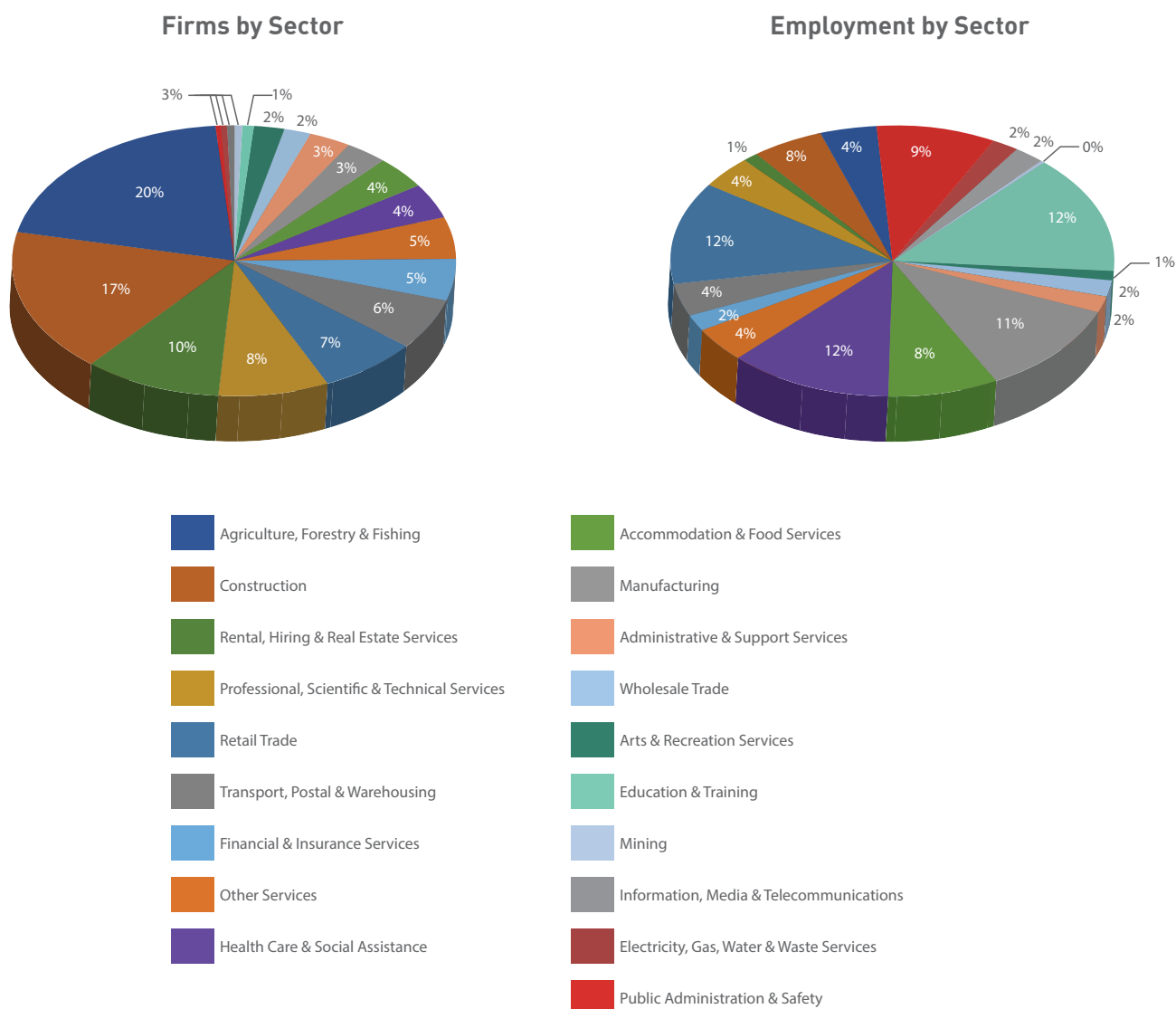
Figure 5: Employment by Occupation Source: DPC Data



Industry Composition

Bathurst has a diverse economy, as seen in Figure 6, which shows the current employment breakdown.

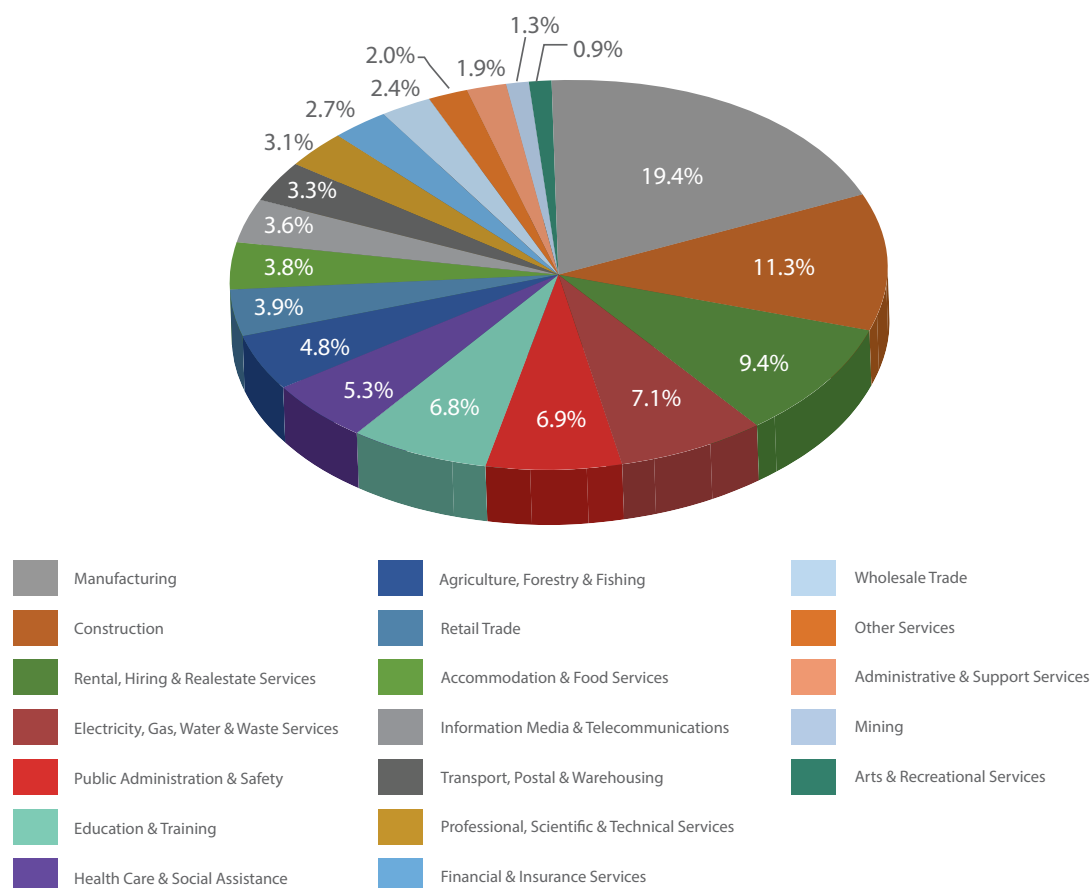
Figure 6: Industry Composition by Business Sector



Source: 2016 Census Data, Regional Statistics by LGA, 2011-2016, Annual (2010-11 to 2015-16) Bathurst Regional Council

The relative contribution of various industries to Bathurst's overall income can be evaluated by comparing the number of businesses in a sector to the employees in that sector. For example, if the number of firms in an industry sector comprises only 2% of the overall economy but 10% of overall employment, the sector would be characterised by fewer, larger firms; conversely, if 10% of firms support 2% of employment, then the sector would consist of many smaller firms. For example, agriculture, forestry and fishing makes up 20% of all firms but only 4% of total employment, therefore this industry contains many small firms. In contrast, education and training makes up only 1% of all firms but accounts for 12% of all employment and is characterised by few, large firms. The largest employing industries are retail trade, health care and social assistance, accommodation and food services, manufacturing, education and training, and public administration and safety.

Figure 7: Output by Industry (2016) Source: .id 2017



It is important to analyse industries by their output as well and find the overlaps in industries between different economic indicators. **Figure 7** shows the breakdown of industries by their output in Bathurst. Manufacturing makes up 19.4% of all industry output in Bathurst, 11% of all employment, and is also highly concentrated in the region. Education and training makes up 6.8% of output in Bathurst, 12% of employment and has a large concentration in Bathurst as well. Public administration and safety is another industry with a high percentage of output, employment and concentration in Bathurst. These industries are critical to the economy in Bathurst.

An additional characteristic to examine is how the economy is populated by firm size, measured by number of workers and number of firms. It is generally considered desirable to have a healthy representation of small and medium-sized businesses, especially when such a presence indicates widespread successful entrepreneurship. Under the right conditions, small firms can perform as “gazelles” – that is, they can be particularly effective at creating large amounts of jobs at a rapid pace. Creating the right conditions can lead to significant stimulation of the local economy. Bathurst’s concentration of small firms (from 1-4 employees) keeps pace with other communities in Australia, as well as New South Wales as a whole. Bathurst is also well represented in the 5-9 employee range. This data suggest that Bathurst has a strong foundation in terms of business demographics. Capturing any intrinsic advantages more fully is one key goal of the Economic Development Strategy. Examining the percentages of firms within each employee count provides context for how well a local economy is facilitating growth of smaller companies into more mature, stable employment generators (.id 2017).

Table 3 shows projections of population growth in the Bathurst Regional Council LGA

Table 3: Bathurst Regional Council Population Projection

	2011	2016	2021	2026	2031	2036
Total Population	39,950	43,300	46,500	49,550	52,500	55,250
Total households	15,250	16,850	18,350	19,800	21,150	22,450
Average Household Size	2.48	2.43	2.40	2.37	2.34	2.32
Implied Dwellings	16,850	18,600	20,300	21,900	23,400	24,800

Source: NSW Planning and Environment 2016 New South Wales State and Local Government Area Population and Household Projections, and Implied Dwelling Requirements

The population of the Bathurst region is expected to grow from 43,300 people in 2016 to 55,250 people in 2036, adding 11,950 people. The data also suggests that some 6,200 new homes will be required to house this increased regional population to 2036.

Industry Cluster Analysis

Industry composition is an essential consideration of every economic development plan. Existing industry base and future industry growth need not be inextricably linked, though current composition provides important context for assessing local growth prospects. Local effects that drive employment changes can be teased out of overall employment data by assessing Location Quotients (LQs).

While Public Administration, Education & Training and Electricity, Gas & Water Services are functions of a growing population base, Agriculture, Mining and Manufacturing are specialisations in the region compared to the NSW economy. These industry sectors have variable growth potential over the reporting period (2018-2022) as they have the highest LQs and therefore competitive advantages (For more information see Appendix page 44).

Council's Economic Assets

Mount Panorama

Mount Panorama is a premier motor car racing circuit with iconic international status, and is the Bathurst Region's single most important economic and tourism asset. The pit complex and paddock areas have been upgraded through substantial investment from Bathurst Regional Council, NSW Government and Federal Government. The sporting facilities in the precinct have diversified to accommodate uses other than motorsport including a world class BMX circuit, velodrome and mountain bike track, a planned international standard go-kart circuit, harness racing track, archery, shooting ranges and the National Motor Racing Museum. A Rydges hotel is also located on Mount Panorama. The hotel has 132 rooms and can host large functions and conferences.

Bathurst Regional Council has the legal right to host up to five full track events within the Mount Panorama circuit each year. Due to the races being held on what is normally a public road, the full track road closures and race events are governed by the Mount Panorama Motor Racing Act 1989. Currently, Mount Panorama is home to four major motor sport events annually, the Supercheap Auto Bathurst 1000, the Liqui-Moly Bathurst 12 Hour, the Hi-Tec Oils Bathurst 6 Hour and Challenge Bathurst.

In 2009, the four events that were held in that year contributed \$29.3M in value added to the Bathurst economy when flow-on effects are taken into account, which represented 1.9% of the total Gross Regional Product for that year. They created approximately 355 FTE equivalent jobs and generated approximately 19% of the total contribution from tourism to the Bathurst economy (Economic Impact of Mount Panorama 2009). Bathurst Regional Council wishes to increase the utilisation of Mount Panorama through the development of the Second Circuit. Through a process of advocacy and lobbying to both state and federal governments, Council hopes to attract a \$50M investment in new infrastructure which would result in the development of a second world class racing circuit, designed for major four and two wheeled motorsport events. A second circuit would provide Council with the capacity to host racing events on the second circuit of Mount Panorama all year round.

The second circuit would ideally be accompanied by a business park catering to motor research & development, and commercial business opportunities. Broader use of the Mount Panorama facilities would deliver all year-round economic benefit to the region

through jobs growth, infrastructure development and inbound tourism.

Kelso Industrial Estate

The Kelso industrial area is of particular strategic importance to both Bathurst and the wider regional area. As Bathurst's main industrial precinct for medium and heavy development, it represents the opportunity to provide industrial related employment for its residents. The main industrial area is located only metres from the Sydney Road allowing easy access to markets and transport. Lot sizes in the Kelso Industrial Estate range from 6,381 square metres to 28,900 square metres. All services are provided to each lot including roads, water, sewer, drainage and telecommunications. Currently Council has 16 lots available for sale in this estate (2017).

Bathurst Trade Centre

Servicing both the local and regional community, the Bathurst Trade Centre has a range of operations. Located at the starting point of the Mitchell Highway in the city's west, this industrial estate is easily accessible via freight and transport links.

There is a strong cluster of like businesses and the Centre is growing steadily. The lot sizes are generally smaller than those in the Kelso Industrial Estate; however as the developer of this area, Council is able to create larger lots on request and subject to land availability.

Council has recently approved the development of 15 lots in the Bathurst Trade Centre (average lot size of 3,360m²), which is expected to be completed by late 2017.

Aerodrome

The Bathurst Aerodrome is a 195ha site and was built in 1935. Today, the airport is serviced by REX airlines, providing Regular Public Transport (RPT) service to Sydney (25 flights per week) utilising 34 seat Saab340 aircraft. Panorama Airways and Smartair provide charter services and a number of flying training schools operate at the Aerodrome, including the Australian Air Force Cadets. Bathurst Aerodrome is one of the closest regional airports outside the Sydney basin, which makes it a popular option as a destination for many pilots, mostly trainee pilots from Bankstown and Camden Aerodromes. The Aerodrome is a strategically significant precinct in terms of providing a transport mix for both travellers and for logistics, with the potential for the site to become an industrial freight and storage site.

Locally based aircraft are charged an annual fee, in lieu of landing charges. The airport has two primary runways: one sealed and one gravel. The sealed runway is 1705m long, 30m wide and is rated at a PCN of 12, with a full reconstruction of the runway pavement completed in February 2015. The gravel runway is 1315m long, 30m wide and is an unrated pavement. The airport also has one grass runway, 800m long, used for glider traffic. The sealed runway, taxiway and apron have lighting facilities which are pilot activated. Three aircraft maintenance facilities operate at the Aerodrome along with two AVGAS and one AVTUR fuel suppliers.

In 2015 Bathurst Regional Council received \$2.5M of matched funding under Round Two of the Australian Government's National Stronger Regions Fund to upgrade the Aerodrome. The upgrade will see the construction of a parallel taxiway, a large sealed aircraft parking area and sewer reticulation, a new fence around the perimeter of the airport, tie-down facilities for smaller aircrafts and new CCTV security. Bathurst Regional Council has also approved development of up to approximately 5,000 square metres of land at the Bathurst Aerodrome for hangar development. Features include access to power, water, septic, data/phone, long term leases, customised block sizes based on requirements, close proximity to Sydney, Badgerys Creek and Canberra airports as well as proximity to regional airfields. The aerodrome operations are informed by the Bathurst Airport Master Plan and the Airport Asset Management Plan.

Sporting Facilities

Sports in general are well supported by the Bathurst community. Bathurst Regional Council, NSW State and Federal Governments have contributed significant funds over the past decade to build new facilities, such as a new heated Aquatic Centre, an Indoor Sports Stadium, Hockey Complex and a major upgrade of the track, pit complex and spectator facilities at the Mount Panorama circuit.

The Hockey Complex is an advanced facility which includes water and sand based fields as well as numerous grass fields. Bathurst has had a long association with competitive Hockey at the National level.

The city provides dedicated sports facilities for motor racing, Rugby League (part of Group 10), Rugby Union, AFL, Athletics, Cricket, Netball, Tennis, Football and Touch Football. There are over 70 different sporting groups and organisations in the region from the Academy of Dance, croquet, aero, pony clubs, through to football, rugby, cricket and cycling.

Bathurst Regional Council has entered into a medium term contract with Penrith Panthers to host one NRL game at Carrington Park each year. Carrington Park received \$850K worth of upgrades in 2016, demonstrating Council's ongoing commitment to hosting national and international level sport.

Cycling is increasingly considered a speciality sport of the Bathurst region with ideal road and community facilities around the city. The Bathurst Cycling Club is one of the oldest sports clubs in Australia, founded in 1884. Council has constructed a major facility for cycling which was officially opened in 2015. The Bike Park inclusive of a velodrome, an Olympic standard BMX track and a mountain bike track on Mount Panorama will lead to the region becoming one of Australia's leading venues for cycling events. Bathurst held the National BMX Championship in 2016, the Oceania BMX Championship in 2017 and numerous MTB events including the Central West Interclub Series and the Evocities MTB Series.

Museums, Galleries, Visitor and Cultural Facilities (Council)

The Bathurst Regional Art Gallery (BRAG) is located within the Keppel Street café precinct and co-located with the library. The gallery has acquired a significant permanent collection of artworks and provides free access to residents and visitors to its changing exhibition program.

The gallery attracts touring shows from other galleries, stages its own curated exhibitions within the gallery and develops exhibitions which tour to other art museums and galleries in Australia.

The Bathurst Library is co-located with BRAG on the Keppel Street site. It services the region via the central library and mobile library services to schools and residents. The library has 1720sq. metres of space and provides a mix of book, DVD and music lending, access to computer services, a family history centre, relaxed reading spaces and activity spaces for community groups and young children. The library was fully renovated in 2018.

The Bathurst Visitor Information Centre is strategically located adjacent to the Great Western Highway in order to capture the passing tourist flow. For many visitors the centre provides the first port of call and the principal source of information about the cultural facilities on offer.

The Bathurst Memorial Entertainment Centre (BMEC) is located in the centre of Bathurst, adjacent to the Bathurst Regional Council administration building. It is an ideal location from the perspective of centrality; however there are site constraints in terms of redeveloping the existing facility in the future. The facility is adequate, but limited in its performance spaces and back of house provision. The range of performing art activities includes theatrical performances, musicals, dance and physical theatre. The Centre attracts both national and international acts.

Bathurst Regional Council is responsible for the day-to-day operations of three existing museums and is proposing to develop a fourth. The museums represent a diverse range of subject matters, from fossils to motor racing and Australia's political history.

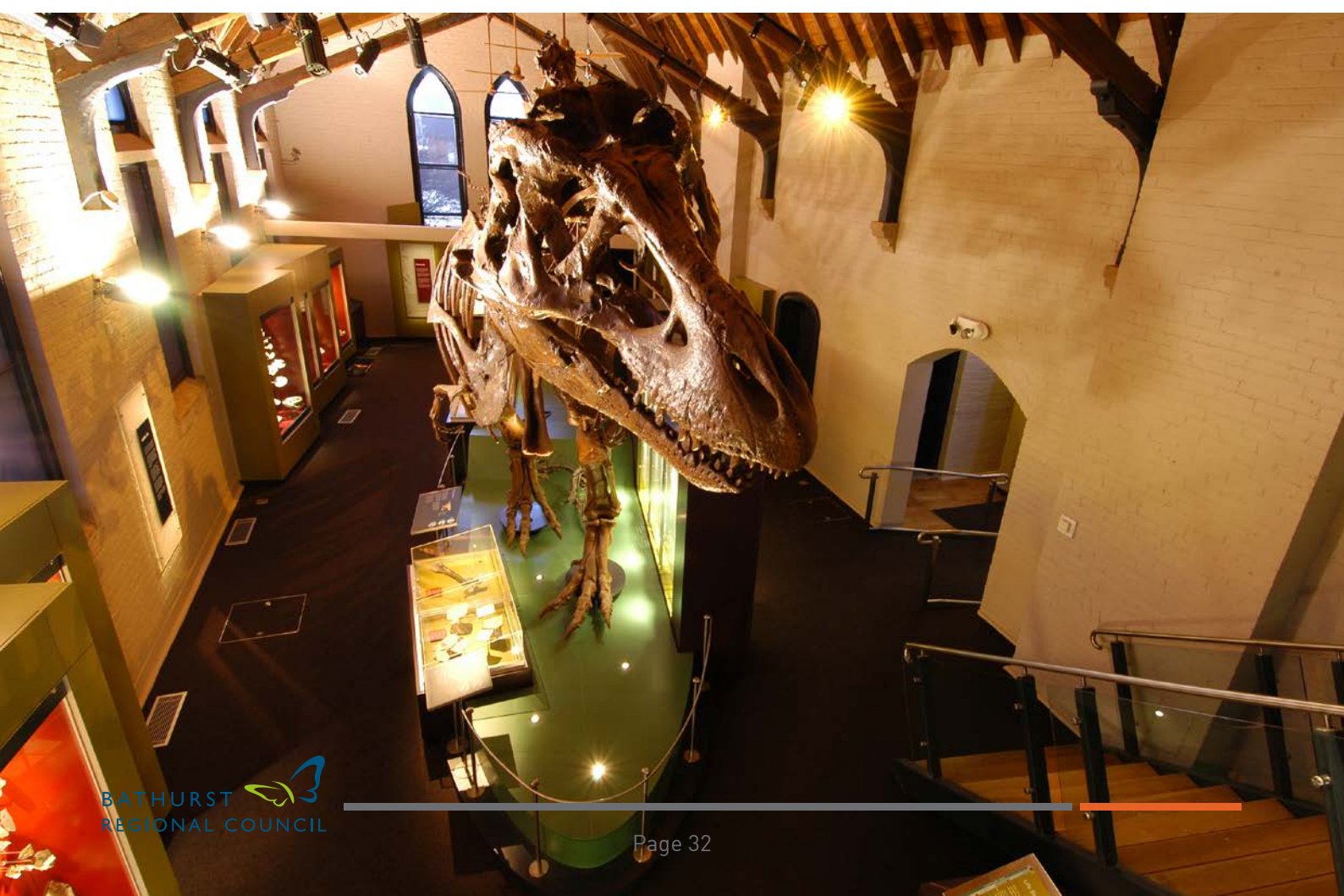
The Australian Fossil and Mineral Museum, incorporating the Somerville Collection, brings together fossil and mineral collections in one place. The collection is housed in the cleverly converted, historic Bathurst Public School building. It is estimated that in the order of 24,000 people visit the museum each year.

The National Motor Racing Museum is located at the base of the Mt Panorama car racing circuit and displays vehicles that represent the history of motor racing, including vehicles associated with the history of racing at Mt Panorama. It is estimated that in the order of 30,000 people visit the museum each year.

The Chifley Home and Education Centre is located on Busby Street in suburban Bathurst and constitutes the former home of Ben Chifley and his wife through their life, including the period that he was Prime Minister of Australia. Bathurst Regional Council has purchased the adjacent cottage and converted it into an information and education centre dedicated to the life and times of Ben Chifley. It is estimated that there are around 2,000 visitors per year.

The Rail Museum is proposed to house a gifted rail layout in the redeveloped Railway Institute Building located in the Railway Station precinct. The intention is to use the rail layout as the basis for a museum that tells the story of rail and its role in the history of Bathurst and inland NSW. The Institute Building is strategically located close to the Bathurst Railway Station and has easy access to Keppel Street, BRAG and the Library.

* Museums & Galleries information taken from the Bathurst Cultural Vision 2017.



Foundational Economic Features

Road Freight Networks

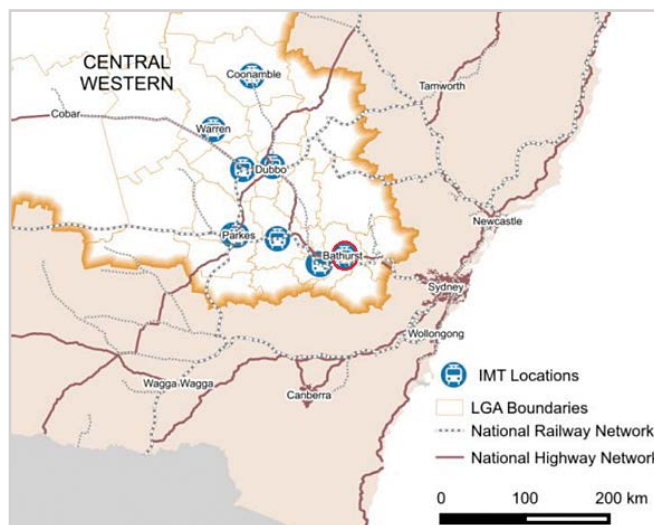
The Bathurst Region is well connected to the national road network. However, access is constrained over the Blue Mountains to Sydney, due to Higher Mass Limit (HML) restricted bridges. Bottlenecks on routes into Sydney were identified as barriers to productive use of road freight. There are a number of bridges with restricted mass limits on the route from Parkes to Bathurst and onwards to Sydney. Access restrictions over the Blue Mountains means that many operators use a smaller vehicle for the entire journey from the region to Sydney, due to the cost of de-stuffing and repacking along the route.

Upgrades to the Great Western Highway through the Blue Mountains and the \$48M upgrade to the Bells Line of Road (an alternative route to Sydney) will alleviate some of these concerns. However, due to predicted freight increases up until 2034, the Great Western Highway through Lithgow and Bathurst will experience major congestion without further expansion (RDA Central West Freight Study 2014).

Rail & Intermodal Terminals

The major rail lines across the Central West are operated and maintained by three separate network managers. Numerous privately owned rail sidings, spur lines and loops are connected to the major networks. The Central West Line which runs through Bathurst and connects to the Port of Botany is managed by John Holland Rail.

There are two Intermodal Terminals (IMTs) that operate in the Bathurst Region, with the potential for a third to be developed in the Kelso Industrial Estate in the near future.



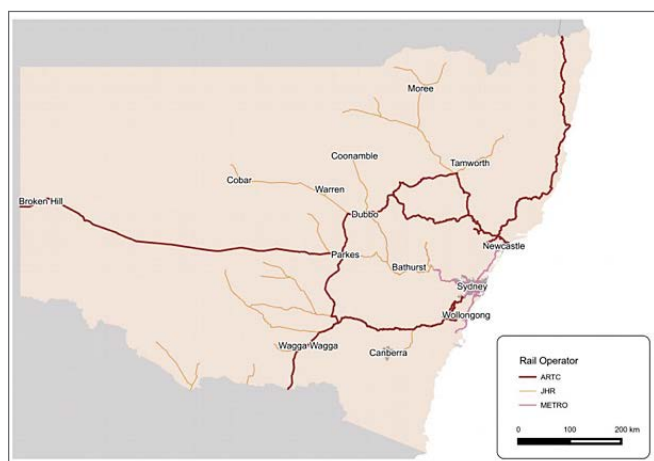
PwC Containerised Cargo Demand Assessment Central West NSW 2015

Under the current infrastructure framework in NSW, Intermodal Terminals are delivered by the private sector. Traditionally there has been little support provided by levels of government into the planning and delivery of freight Intermodal Terminals. The number of terminals in the Central West creates tough competition. Additionally, capacity generally exists within the Central West rail system however is constrained by capacity for train paths through the Sydney Metropolitan Network.

THE IMPORTANCE OF REGIONAL FREIGHT MOVEMENT IN NSW

“Economic Growth in Regional NSW relies on the movement of goods through efficient and effective transport networks. The ability of NSW producers to move agriculture, industrial products and natural resources to domestic and export markets in a timely and efficient manner directly impacts on productivity and competitiveness - and hence the economic performance of regional NSW”

NSW Freight and Ports Strategy



NSW Rail Network by Operator
PwC Containerised Cargo Demand Assessment Central West NSW
2015

The lack of capacity and reduced reliability results in transport cost increases and reduces the attractiveness of rail over road as a preferred choice. Sections of the network based on volume increases up to 2034 are likely to require capacity enhancement in the form of track structure / signalling upgrades, increased path availability through additional crossing loops, or a combination of measures. This may be especially significant in the Bathurst Region should a third Intermodal Terminal be developed.

Intermodal Terminals operating in the Bathurst Region

OWNER	PRIMARY USER	RAIL CONNECTION	ACCESS
Pacific National	PF Olsen	Central West Line	Closed – Port Botany
Grainforce	Grainforce, third party shippers	Central West Line	Open – Port Botany

The Intermodal Terminal operated by Pacific National is a closed access terminal, and therefore does not allow third party shippers. The Grainforce Intermodal Terminal is open access and is considered to have a natural catchment area of 100km, extending to Orange to the West, Bathurst to the North, approximately half of Lithgow Shire to the East and Oberon to the South.

The terminal is characterised by:

- Connection to the road transport network (HML 19 Metre Articulated B-Doubles), although mass limits apply over the Blue Mountains
- Strong connections to existing rail transport networks, as Bathurst lies on the Central West rail line
- Facilities to containerise grain on site
- An estimated cycle time into the Port of Botany of 24 hours

- A catchment area estimated to encompass 20,212 TEUs (Twenty-Foot Equivalent Units) in 2015

Sealink have also opened an additional Intermodal Terminal in Blayney. The catchment area of this terminal overlaps with the existing terminals in Bathurst. While the overlap is significant, it is unclear if the two terminals will draw freight volumes from the same commodity groups.

Air Freight

Regular Public Transport (RPT) flights operate between Sydney Airport (Mascot) and Bathurst, Orange and Parkes. These are operated by Regional Express Airlines (REX) utilising 34 seat Saab340 aircraft. Each flight carries on average approximately 25 kilograms of freight. With 61 flights per week in the Central West this amounts to 1.5 tonnes of freight per week or approximately 80 tonnes per year.

Toll Aviation operates air freight on behalf of Toll Priority. Toll Aviation has bases in Brisbane, Bankstown and Adelaide. A number of aircraft operate out of Bankstown for regional ports during weekdays. These include two Piper Chieftain twin-engine aircraft owned by AFS/Parkes Aviation and running to Bathurst, Orange, Parkes and Dubbo.

Heritage

The Bathurst Region has been inhabited by the Wiradjuri people for over 40,000 years. Today there are many clans/nations whom have relocated here and actively contribute to the economic, social, cultural and political life of the region. Bathurst is the oldest inland European settlement within the Australian continent, and therefore the city and villages within the region have significant historic claim, with a history rich in early settlement, mining and pastoralism. Large manufacturing facilities, together with education, health, retail, government agencies and agriculture have all shaped and will continue to shape the history of the people and places of the region. The Bathurst Regional Local Government Area has 330 listed heritage items and 10 heritage conservation areas and 994 places throughout the region that have been identified as having some level of heritage significance. Heritage includes both tangible aspects, such as buildings, memorials and landscapes; and intangible aspects, such as cultural practices, stories and conserved knowledge.

The historic environment is a proven source of benefit to local economies, particularly through tourism enhancement. Additionally, an attractive heritage environment assists in attracting external investment

as well as maintaining existing businesses of all types, not just tourism-related. Therefore, the heritage of the Bathurst Region is an important economic asset and is actively preserved by Council.

Adaptive reuse of heritage buildings is an important factor in creating sustainable communities. Heritage buildings add value to regeneration projects, both in terms of the economic and environmental advantage of reuse over new build and in adding character to a precinct. The economic value of heritage is recognised in the Bathurst Region Heritage Strategy 2018-2021.

Land Development & Zoning

Bathurst prioritises sustainable development within the LGA. In 2014, Bathurst Regional Council developed the Bathurst Regional Local Environment Plan (LEP) which details the development and zoning standards for the LGA. The goals for development in Bathurst are outlined and include; ecological sustainable development with consideration to climate change and the management, preservation and growing of resources, protecting Aboriginal and European heritage, protecting and growing biodiversity conservation, growing rural, urban and suburban lifestyle living opportunities and communities, and minimising risk to communities from environmental hazards such as floods and fires. The Bathurst community recognises the importance of natural resources, the environment, community and cultural heritage in its economic development and has written its development strategy to reflect this.

Council continues to proactively zone sufficient land to cater for future long term growth of the City and allow for choice when locating developments. In the 2016/17 financial year, Council zoned:

Residential land

565.84 ha for general residential
235 ha for rural residential development

Commercial land

5.12 ha of land for neighbourhood shopping needs
66.13 ha of land for trade style businesses
4.9 ha of land for CBD style business needs

Industrial land

104 ha of land for industrial developments

Telecommunications & Internet Access Opportunities

With the recent implementation of NBN, a new broadband network, to all of Central West New South Wales, Bathurst is one of many LGAs now part of the most well-connected area in the country. For years the rural area of the country has been using outdated and slow telecommunications software which inhibited communication. With this new infrastructure, almost

every home and business now has access to high speed broadband software. This allows for teleconferences, video conferences, streaming and other new communication opportunities in the region.

Megatrends

In 2012 the CSIRO identified seven mega trends:

1. Greater demand for resources
2. Threats to the natural environment
3. Impact of eastern economic trends on the west
4. Expanding technologies
5. Disruption and the service economy
6. New technological markets
7. Our aging population

These megatrends will have impacts on regional economies in one way or another. The Bathurst Region will not be immune from these trends and needs to be prepared for their influence.

Aging Population

Unlike some other LGAs within the Central West, Bathurst has a smaller proportion of older residents. While Bathurst is comprised of a younger population when compared to other LGAs, the region will still face similar challenges in the provision of aged care services (medical, aged care facilities) as the proportion of older residents increases over time.

Growth of Digital Technology & Innovation

The New South Wales Government recently provided \$270,000 for a start-up incubator in Bathurst. That money created 'Upstairs', a 24 hour workspace with high speed internet, meeting rooms, pitch space and 50 work spaces to nurture and encourage new businesses. Upstairs will also provide many new community programs including mentoring programs, coding classes for kids, robotics competitions and many more. This community facility was developed through the assistance of the Foundation Partners; Bathurst Regional Council, Charles Sturt University, Department of Industry, Jobs for NSW, Office of Regional Development and Reliance Bank. This represents the collaborative culture that exists within Bathurst which enables the development of technology and innovation. Council will also lead the development of a Smart City Plan for Bathurst, which will position the region as a national leader in technological innovation.

Education

With over 60 educational institutions and a location quotient of 1.40 in 2016 (refer to the Appendix page 44), education and training is highly concentrated in Bathurst. Bathurst is home to Charles Sturt University (CSU), Western Institute of TAFE, the Conservatorium of

Music, two public high schools, public primary schools, private primary schools and 4 private colleges. Due to the extensive amount of educational opportunities, young Bathurst residents are more likely to remain in Bathurst for their education and hopefully for work as well. This means that residents can grow up in Bathurst, go to school in Bathurst and learn the skills for industries needed for Bathurst to thrive, and eventually work in Bathurst and contribute to the economy.

These educational institutions will need to fill the skills gap identified by the community in IT, engineering, professional services and care services skills.

Tourism

As one of the oldest settlements west of the Blue Mountains, the Bathurst Region has lots of history, heritage and culture worth exploring, which is why the tourism industry has been identified by the community as an opportunity sector for growth. Not only is Bathurst home to the history of the Wiradjuri tribe and the gold rush, Bathurst has many other attractions for visitors as well. Mount Panorama is a world renowned racing facility and hosts many events throughout the year. The Bathurst Region has numerous museums and galleries, sporting facilities, wildlife sanctuaries, underground caves, and wineries that draw people in. Annual events like the Bathurst Royal Show, the Winter Festival and motor racing bring many people to Bathurst.

Key Observations

Four industries have a large economic impact on the region in that they produce large amounts of output, employ a large percentage of the population and are high growth industries. These are education and training, health care and social assistance, public administration and safety, and manufacturing.

Education and Training

Education and training is the second highest concentrated industry in Bathurst among level 1 ANZSIC industries with more than 60 educational institutions that employ 12% of the workforce. However, the community still believes there is a skills gap in IT, engineering, professional services and care services. Council should work with it's educational partners to address these skill gaps.

Health Care and Social Assistance

Health care and social assistance has a location quotient above 1, employs 12% of the workforce, and is growing at three times the rate of the population. In the SWOT analysis, the community identified specialised care as one of Bathurst's weaknesses. It will be important for Bathurst to consider how to develop specialised care as the industry grows at such a high rate.

Public Administration and Safety

Public administration and safety employs 9% of the workforce, produces 6.9% of total output in Bathurst and has a location quotient of 1.42. It is also projected to grow at a rate of 1.09% from 2015 to 2020 in the Central West. However, these industries do not produce goods that Bathurst can export to other areas.

Manufacturing

Manufacturing is a main industry in the economy and employs 11% of the workforce, produces 19.4% of total output in Bathurst and has a location quotient of 1.40. However, it is not a high growth industry sector. In fact, manufacturing employment decreased by 9.6% from 2011 to 2016 due to industry and local factors.

Action Plan

The **Economic Development Action Plan** is critical to the economic growth of the Bathurst Region. The Action Plan allows Bathurst Regional Council, its partners and the broader community to strategically plan and facilitate actions that will activate the region's Economic Enablers. It recognises the role of other levels of government, industry groups, education and health services and other organisations in achieving economic prosperity. Implementation of the strategies and actions presented in this plan requires a dedicated, sustained and collaborative approach from all stakeholders and the community.

Monitoring and evaluating the objectives and actions of the Economic Development Strategy will be completed on an ongoing basis. An annual review of progress towards the outcomes sought from the Economic Development Strategy and associated Action Plan should be undertaken by Council's Economic Development section.

Converting our Economic Enablers into Actionable Objectives

Council and its stakeholders will drive Bathurst's growth through activating our Economic Enablers:

- Infrastructure
- Planning
- Regional branding, marketing & tourism
- Networks and partnerships
- Local employment
- Smart City development

Objectives

- ① Nurture economic and cultural infrastructure development.
- ② Planning processes that protect and grow a vibrant region.
- ③ Market-leading promotional campaigns and events.
- ④ Support local business growth, partnerships and skill development.
- ⑤ Grow local employment, investment and attract new businesses.
- ⑥ Develop Bathurst into a Smart City.

ECONOMIC ENABLER: INFRASTRUCTURE

OBJECTIVE 1: Nurture economic and cultural infrastructure development.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
1.1	Continue to develop community, recreational and cultural infrastructure that enhances the lifestyle of the Bathurst Region.	Long Term	Industry, government agencies, community groups, Heritage Reference Group
1.2	Advocate for the upgrade and development of rail transport networks, such as the expansion of regional Intermodal Terminals (IMTs), support for the proposed Inland Rail and capacity on the Central West Line.	Long Term	Government agencies, industry, CENTROC, RDA Central West
1.3	Continual attraction of funding and ongoing infrastructure planning for the development of Mount Panorama Second Circuit and the associated motorsport R&D industrial precinct.	Short Term	Industry (particularly automotive), government agencies, community groups, Supercars
1.4	Continued investment in sporting and recreational infrastructure to enhance lifestyle, attract more events and encourage local participation.	Long Term	Sporting clubs, government agencies, community groups
1.5	Activate the Cultural Vision 2036 actions inclusive of cultural facility upgrades, development of a Collections Management & Storage Facility and the Bathurst Railway Museum, and the creation of facility business plans.	Medium Term	Industry, government agencies, community groups
1.6	Facilitate sustained population growth and provisioning through the funding and upgrade of capital works programs and upgrades to Chifley and Winburndale dams.	Medium Term	Government agencies, community groups
1.7	Identify and develop (where appropriate) infrastructure partnership projects with neighbouring LGAs.	Long Term	Neighbouring Councils, government agencies, CENTROC
1.8	Strategic land development at the Bathurst aerodrome to attract aviation related investment and active pursuit of State/Federal funding to expand infrastructure.	Long Term	Industry, government agencies
1.9	Pursue the adaptive reuse of the former Bathurst TAFE site.	Medium Term	Industry, government agencies, community groups
1.10	Activate opportunities to improve community and commercial access to mobile telecommunications and NBN technologies, inclusive of the expansion of NBN fibre to industrial and residential precincts and the upgrade of mobile base stations.	Medium Term	Industry, government agencies, Bathurst Business Chamber, community groups, Central West RDA
1.11	Implement Council's asset management plans for infrastructure works and provide for ongoing review.	Long Term	Government agencies
1.12	Advocate for the ongoing development of access transport links inclusive of the Bells Line of Road, upgrade of daily return train services, the reduction of Higher Mass Limit (HML) restricted bridges within the region and further expansion of the Great Western Highway through Lithgow and Bathurst.	Long Term	Government agencies, CENTROC
1.13	Support demographic change of the Bathurst population through the attraction of private investment in aged care and childcare centres.	Long Term	Industry, ID Profile
1.14	Review, update and implement the Bathurst Region Signage Strategy as informed by the Bathurst Destination Brand and Destination Management Plan.	Medium Term	Government agencies
1.15	Continue Council's land development program to ensure adequate supply of residential, service trade & industrial land.	Long Term	Industry, Government agencies
Economic Outcomes	<p>NBN fibre installation at identified industrial precincts (inclusive of the aerodrome).</p> <p>Funding sourced from government agencies for the development of the aerodrome.</p> <p>Development of new cultural facilities, inclusive of the Bathurst Railway Museum and the Collections & Management Facility.</p> <p>Energy efficiencies are achieved across Council assets and the installation of LEDs in Bathurst street lights.</p> <p>Water, telecommunications and other services keep pace with land releases and population growth.</p> <p>Development of the Second Circuit and accompanying industrial precinct on Mount Panorama.</p>		

ECONOMIC ENABLER: PLANNING

OBJECTIVE 2: Planning processes that protect and grow a vibrant region.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
2.1	Ensure that the Regions' strategic planning and land use strategies accommodate long term business and residential needs.	Long Term	Government agencies, industry, community groups, Bathurst Business Chamber
2.2	Reduce multiple handling and streamline the planning approval process through improved definition and coordination of the activities of all agencies in public land management and planning.	Long Term	Government agencies, industry
2.3	Manage housing development pressures and mixed residential requirements through the adoption and rollout of the 2036 Housing Strategy.	Long Term	Government agencies
2.4	Implement the recommendations of the Bathurst Region Heritage Plan 2017-2020 inclusive of the Development of local urban design guidelines for the city of Bathurst and integrate those guidelines into Council's planning controls giving particular regard to: <ul style="list-style-type: none"> • Maintaining the integrity of heritage places, streetscape and vistas. • Integrating new growth within heritage conservation areas. • Promoting well designed urban renewal precincts. • Improving city/village entrances and gateways. • Adaptive reuse of major historic sites within the Bathurst CBD. • Encourage the use of local artisans and tradespeople in undertaking heritage, restoration, rehabilitation and interpretative works. • Engagement with the community in maintaining the heritage identity of Bathurst. 	Medium Term	Government agencies, community groups
2.5	Maximise opportunities to expand land resources for primary production purposes.	Long Term	Government agencies, industry, Central West RDA
2.6	Protect non-fragmentation of retail clustering within the CBD through the Bathurst CBD and Bulky Goods Business Development Strategy and the Local Environmental Plan.	Long Term	Government agencies, community groups, industry, Bathurst Business Chamber
2.7	Where appropriate for developments that significantly enhance and protect heritage and culture, waive DA fees and other application fees to encourage applications to be lodged and minimise the cost of the approval process.	Long Term	Government agencies, community groups, industry
2.8	Implement the adopted Rural Strategy through the Local Environmental Plan and provide for ongoing major review in each 10 year period.	Long Term	Government agencies
2.9	Continue the Bathurst CBD Main Street Improvement Fund.	Long Term	Community groups, industry
2.10	Update and adopt Council's Social and Community Plan, and implement the recommendations of the Bathurst Community Safety Plan 2015-2019.	Short Term	Community groups, government agencies
2.11	Minimise the fragmentation of agricultural lands, protect highly valued lands and encourage the consolidation of small holdings.	Long Term	Government agencies, industry, Central West RDA
2.12	Participate in the development and rollout of cross regional plans, inclusive of the Central West and Orana Regional Plan to ensure the Bathurst regions economic issues are identified and included.	Long Term	Government agencies, industry, Central West RDA, CENTROC
2.13	Provide a network of robust neighbourhood activity centres and convenience centres/stores to meet the needs of existing and future suburban populations.	Long Term	Industry, government agencies
2.14	Review the Bathurst CBD Car Parking Strategy 2013 to ensure adequate car parking areas are available to service new retailing and commercial developments, including regulation of time limits of existing on and off street car parking areas.	Medium Term	Industry, government agencies
2.15	Provide public transport infrastructure within activity centres to support local and intercity public transport services.	Long Term	Government agencies, industry, community groups
2.16	Improve the pedestrian and cycling environment to and within activity centres.	Long Term	Community groups
Economic Outcomes	Achieve an average application approval time less than the average of NSW regional cities. Adoption and rollout of the 2036 Housing Strategy. Continuation of the CBD Main Street Improvement Fund. Continuation of community and industry involvement in heritage matters. Continued protection of heritage, CBD retail clustering and primary production in the Bathurst Region. Increased percentage of residents that utilise public transport and bicycles to get to work.		

ECONOMIC ENABLER: REGIONAL BRANDING, MARKETING & TOURISM

OBJECTIVE 3: Market-leading promotional campaigns and events.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
3.1	Implement the recommendation and actions within the Bathurst Region Destination Management Plan 2015 and promote the Bathurst Region as a key destination within NSW.	Medium Term	Industry, community groups, reference groups, government agencies
3.2	Develop and implement a destination brand across all touch points inclusive of a new website, brochures, Bathurst Visitor Information centre (BVIC) staff and buildings, signage and entry statements.	Short Term	Industry, community groups, reference groups, government agencies
3.3	Promotion of Bathurst lifestyle advantages through continued participation in relocation marketing campaigns inclusive of Evocities and CENTROC's Beyond the Range program.	Medium Term	Evocities, CENTROC, government agencies, community groups
3.4	Strategic partnerships with local education providers to promote Bathurst's role as an Education Hub and to retain students.	Long Term	CSU, TAFE, Skillset, VERTO, other tertiary & secondary providers, employment agencies, government agencies
3.5	Continuation and growth of Council's diverse events program and the development of an Events Strategy to guide future direction.	Medium Term	Industry, community groups
3.6	Redesign of the Lifestyle & Investment Packs incorporating the 2016 Census data and Destination Brand.	Short Term	Industry, government agencies, ID Profile
3.7	Engagement with tourism operators and reference groups to increase the depth of tourism product.	Long Term	Reference groups, community groups
3.8	Publish an image library that represents the destination and its assets, and providing industry with access to the library.	Short Term	Industry, community groups
3.9	Facilitate residential and business investment attraction through continual promotion of the Bathurst Business Hub website, Evocities "Invest" portal, RDA Invest NSW Central West website and relocation prospectus'.	Long Term	RDA Central West, government agencies, Evocities, industry, Bathurst Business Chamber, Central West Business HQ, CenWest Innovate
3.10	Destination messaging that articulates the value of Bathurst as Australia's first inland European settlement, promotes historical architecture and heritage tourism.	Long Term	Reference groups, community groups, government agencies
3.11	Review the structure of tourism within the Council with a view to improving collaboration, efficiency and outcomes across the various Council players charged with conducting tourism associated business.	Medium Term	Industry, reference groups
3.12	Support the attraction of filming and conferences to the Bathurst Region.	Long Term	Screen Central (CENTROC), RDA Central West, industry, community groups, reference groups
3.13	Maximise the potential for Bathurst to attract sporting events through strategic partnerships with sports marketing agencies.	Long Term	Sporting clubs, community groups, industry
3.14	Run regular Mayoral Welcome Wagon morning teas to welcome new residents to the Bathurst region.	Long Term	Community groups, Bathurst Business Chamber
3.15	Measure the economic impact of events in the Bathurst Region through economic impact studies.	Long Term	Industry, ID, economic consultants, community groups, reference groups, government agencies, Bathurst Business Chamber, Central West Business HQ, CenWest Innovate
3.16	Identify and take full advantage of government funding opportunities to upgrade existing tourism product.	Long Term	Government agencies, reference groups
Economic Outcomes	<p>Sustained population growth of 1% per year as a minimum.</p> <p>Installation of new city entrance, village, park signage and entrance billboards.</p> <p>Achieve the target of 1M overnight and domestic day trips by 2022.</p> <p>Inclusion of Bathurst's Destination Brand across Council marketing assets.</p> <p>Increased residential relocations through the Evocities program.</p> <p>Development and rollout of an Events Strategy and increased event visitation.</p> <p>Development of new marketing assets including an image library and promotional lifestyle packs.</p> <p>Continuation of community and industry involvement in tourism matters.</p>		

ECONOMIC ENABLER: NETWORKS & PARTNERSHIPS

OBJECTIVE 4: Support local business growth, partnerships and skill development.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
4.1	Facilitate the creation of industry cluster groups including manufacturing and a technology cluster, with the aim of sharing resources and strengthening supply chains.	Medium Term	Industry, Bathurst Business Chamber, Central West Business HQ, CenWest Innovate
4.2	Work with Village Progress Associations and businesses to investigate Place Activation in key precincts, inclusive of villages, industrial parks, Keppel St. William St. and George St.	Short Term	Bathurst Business Chamber, industry, Central West Business HQ, CenWest Innovate, Village Progress Associations
4.3	Support the Bathurst Business Chamber and relevant business houses through partnership programs (including the hosting of an After Hours networking event annually), event attendance and sponsorship of relevant award categories at the Business Awards.	Long Term	Bathurst Business Chamber, industry, Central West Business HQ, CenWest Innovate, Central West RDA
4.4	Develop an informed business community through the growth of the business database, provision of monthly eNewsletters and maintenance of the Business Hub website.	Long Term	Industry, government agencies, Registered Training Organisations, Central West Business HQ, CenWest Innovate
4.5	Represent and provide presentations (where required) at relevant conferences and events on business practices, innovation and branding.	Long Term	Industry, community groups
4.6	Facilitate contact between industry, developers, new business, relocators, training bodies and community groups where appropriate.	Long Term	Industry, Registered Training Organisations, community groups, Central West Business HQ, CenWest Innovate, Bathurst Business Chamber
4.7	Implement the actions from the Bathurst Manufacturing Study 2015 including the provision of grant information, contacts and reactivation of the manufacturing cluster.	Short Term	Industry, government agencies
4.8	Host leading business experts in Bathurst to share knowledge through industry forums.	Long Term	Industry, government agencies
4.9	Enter the Bathurst Region into relevant economic and regional development awards.	Long Term	Industry, community groups, government agencies, Bathurst Business Chamber
4.10	Partner with and support NSW and Federal Government programs, inclusive of the Small Biz Bus and the development of the Regional Economic Development Strategy (REDS).	Long Term	Government agencies, industry
4.11	Continue to provide access to the ID websites and ensure economic/demographic data is up-to-date across Council platforms.	Long Term	Industry, Bathurst Business Chamber, community groups, ID, government agencies
4.12	Support the development of business incubators, inclusive of the 'Upstairs Start-up Hub'.	Medium Term	Reliance Bank, CSU, Department of Industry, Jobs NSW, industry
4.13	Continue Council's business development programs inclusive of: <ul style="list-style-type: none"> Bathurst Buy Local Gift Card Business Management workshops BizMonth Annual Business Leaders Lunch 	Long Term	Why Leave Town Promotions, industry
4.14	Promote local business through offering sponsorship opportunities for Council's programs and events.	Long Term	Industry, government agencies
4.15	Work in collaboration with Charles Sturt University, TAFE, VERTO, Skillset, industry and other key educational providers to disseminate training and development opportunities to the business community.	Long Term	CSU, TAFE, VERTO, Skillset, industry, Registered Training Organisations, community groups, Bathurst Business Chamber, Central West RDA, CenWest Innovate, government agencies
4.16	Investigate the activation of a night-time economy.	Medium Term	Industry, community groups, reference groups
Economic Outcomes	<p>Creation of manufacturing, technology and education clusters.</p> <p>Development of a Precinct Activation Plan, inclusive of villages and identified Bathurst city precincts.</p> <p>Stronger supply chains and cost reduction through collaboration and bulk purchasing models.</p> <p>Increased success in NSW and national awards to promote the Bathurst Region.</p> <p>Completion of the REDS for Bathurst and Oberon.</p> <p>Launch of a minimum of 15 new businesses from the Upstairs Start-up Hub.</p> <p>Increased participation from Businesses for business development programs inclusive of BizMonth (inclusive of the Lunch), Buy Local Campaign and the business database.</p> <p>Achieve a total of \$600,000 economic return to the local economy through the Buy Local Gift Card program.</p> <p>Achieve sponsorship targets each financial year.</p>		

ECONOMIC ENABLER: LOCAL EMPLOYMENT

OBJECTIVE 5: Grow local employment, investment and attract new businesses.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
5.1	Development of a structured, targeted and resourced business relocation program that fills existing product/service gaps and available commercial/industrial land at the aerodrome, trade centres and Mount Panorama.	Long Term	Industry (particularly automotive and aviation), Bathurst Business Chamber, community groups, Central West Business HQ, Central West Business HQ, government agencies
5.2	Enhance Bathurst's participation in high level discussions through providing submissions to relevant NSW Parliamentary and Federal Senate enquiries, and attend Parliamentary Hearings where required.	Long Term	Government agencies
5.3	Identify local businesses that are at risk and collaborate with stakeholders to develop a retention plan.	Long Term	Industry, government agencies, Central West Business HQ
5.4	Ensure the continued management and diversification of the Mount Panorama pit complex and circuit to generate revenue and create employment.	Long Term	Industry (particularly automotive), Supercars, government agencies
5.5	Provide support for innovative practices within the agriculture, food manufacturing and renewable energy sectors.	Long Term	Industry, Central West Business HQ, Bathurst Business Chamber, CenWest Innovate, RDA Central West
5.6	Maintain and strengthen Bathurst Regional Council's Aboriginal employment strategy.	Long Term	Community groups
5.7	Continue to run the Bathurst Jobs Expo in collaboration with industry to reduce unemployment, promote skill/career development and retain skilled students within Bathurst through the promotion of jobs.	Long Term	Recruitment agencies, Registered Training Organisations, TAFE, CSU, industry, tertiary education, community groups, Bathurst Business Chamber
5.8	Utilise the Evocities Evojobs portal to promote job opportunities and the attraction of specialist skills to the region.	Medium Term	Evocities, industry, government agencies
5.9	Conduct economic modelling and market research to identify industry trends (especially patterns of decline) and develop programs to address industry challenges.	Long Term	ID, government agencies, industry, Bathurst Business Chamber, Central West RDA, Central West Business HQ, CenWest Innovate
5.10	Explore potential trade and cultural exchange opportunities with Bathurst region sister cities.	Medium Term	Okhuma, Cirencester (potentially), Yanquan (potentially)
5.11	Development of a Youth Unemployment Program to reduce the youth unemployment rate.	Short Term	Industry, community groups, government agencies
5.12	Develop Relocation Prospectus' that attracts the attention of targeted businesses and industries.	Long Term	Industry, government agencies, Bathurst Business Chamber
5.13	Support programs that address Equal Employment Opportunity (EEO) and gender equality in the workplace.	Long Term	Industry, government agencies, community groups
Economic Outcomes	<p>Sustained Gross Regional Product (GRP) growth of 1% per year as a minimum.</p> <p>Unemployment rate below the national, NSW and regional NSW average.</p> <p>An increase in the percentage of the workforce that are working closer to home.</p> <p>Increased percentage and spread of businesses across different industry sectors.</p> <p>Increased number of submissions to the Senate and Parliament to ensure that Council's voice is heard.</p> <p>Lower youth unemployment.</p>		

ECONOMIC ENABLER: SMART CITY DEVELOPMENT

OBJECTIVE 6: Develop Bathurst into a Smart City.

NO.	ACTIONS	ACTION TIME FRAME	PARTNERS
6.1	Develop a Smart Cities Plan and a Smart Cities Project Group.	Short Term	Australian Smart Communities Association (ASCA), industry, Bathurst Business Chamber, community groups
6.2	Actively seek State and Federal funding to support various Smart City projects.	Long Term	Government agencies, industry
6.3	Install a Free Wi-Fi network in the CBD and selected parks with accompanying analytics software that informs planning decisions and assists local businesses.	Short Term	Government agencies, industry
6.4	Work with the local business community to leverage the benefits of advertising, marketing and analytics through the CBD Wi-Fi network i.e. push notifications, foot traffic.	Long Term	Government agencies, industry
6.5	Become a member Council of the leading smart cities research associations and grow local, state and national awareness of Bathurst as a Smart City.	Long Term	Australian Smart Communities Association (ASCA), Future Ready, government agencies, Smart Cities Research Institute
6.6	Investigate the installation of mobile device and Electric Vehicle (EV) charging stations at various Council owned facilities and CBD precincts.	Short Term	Tesla, EV vehicle manufacturers, industry
6.7	Investigate ownership arrangements of street lighting and seek funding for the installation of smart lighting controls.	Short Term	CENTROC, industry, government agencies, Essential Energy, Australian Smart Communities Association (ASCA)
6.8	Promotion and support of innovative practices from local industry (such as Gunthers Lane) and encourage the attraction of technology related businesses and industries to Bathurst.	Long Term	Reliance Bank, industry, government agencies, Central West Business HQ, Bathurst Business Chamber, Central West Business HQ
6.9	Continued installation and investigation of renewable energy technologies in Council owned facilities to reduce pressures from rising energy costs.	Long Term	Renewable energy providers, industry, government agencies
6.10	Pursue funding for smart parking solutions within the CBD.	Medium Term	Industry, government agencies
6.11	Apply for funding to increase the uptake and extension of NBN mixed-use technologies in the Bathurst region as population and industrial precincts grow.	Medium Term	Government agencies, industry
6.12	Continue to investigate the development of the ACSTEI (Australian Centre for Science, Technology & Emerging Industries) Technology Park.	Medium Term	Industry, government agencies, Central West Business HQ, Bathurst Business Chamber, Central West RDA
6.13	Explore the establishment of a CBD CCTV network to be integrated into the CBD Wi-Fi architecture and the continuation of the CCTV Funding Program.	Short Term	Industry, government agencies
6.14	Ensure the Mobile Black Spot Database is up-to-date and seek funding to upgrade mobile base stations to address mobile black spots (especially in the villages) as the Bathurst regional population grows.	Long Term	Australian Communications & Media Authority (ACMA), Central West RDA, industry, community groups, government agencies, Village Progress Associations
6.15	Encourage and lead (where appropriate) the development of apps that enable greater liveability, access to services and tourism.	Short Term	Industry, reference groups, government agencies
6.16	Create an Internet Of Things (IOT) network to remotely manage assets and sensors.	Medium Term	Government agencies, industry
6.17	Explore emerging smart practices in town planning, workforce development and co-development with neighbouring councils.	Long Term	Neighbouring councils, industry, government agencies
Economic Outcomes	Development of a Smart City Plan.		
	Free CBD Wi-Fi Network installed in the CBD with the participation of local businesses.		
	Installation of EV charging stations.		
	Analytics and platforms that support planning decisions and the growth of local businesses.		
	Development of a CBD CCTV network and increased participation from businesses in the CCTV Funding Program.		
	Improved mobile and data services in the LGAs villages.		
	Integration of energy efficiency technologies, inclusive of smart controls within Bathurst street lights and the development of alternative energy precincts.		
	Increased investment in Bathurst resulting from a dedicated Smart City marketing campaign.		

Appendix

Industry Cluster Analysis

Location quotients are calculated by comparing industry-level employment percentages to corresponding percentages within a “base area,” and obtaining a ratio from the comparison. The location quotient (LQ) can be calculated as:

$$LQ = \frac{\left(\frac{\text{Local Employment in Industry A, Year T}}{\text{Total Employment in Year T}} \right)}{\left(\frac{\text{Reference Employment in Industry A, Year T}}{\text{Total Reference Employment in Year T}} \right)}$$

For example, with the New South Wales statewide economy as the base or reference area, 2011 data shows:

- Bathurst’s employment for the electricity, gas, water and waste services sector is 231.
- Total Bathurst employment is 17,519.
- NSW total employment for the electricity, gas, water and waste services sector is 31,881.
- Total NSW employment is 3,221,228.

→ $LQ = [(231 / 17,519) / (31,881 / 3,221,228)] = 1.3$

→ The Bathurst Region LQ for electricity, gas, water and waste services is greater than 1.0

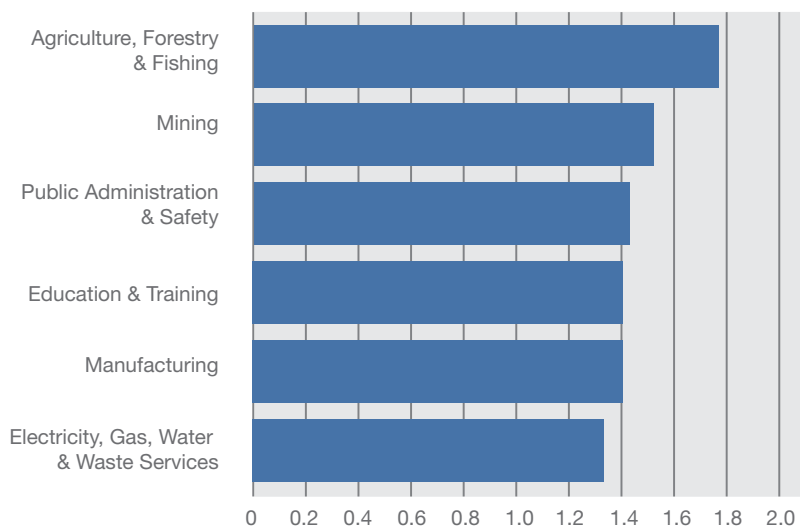
If an industry location quotient for a particular area is greater than 1.0, the implication is that the industry’s presence within that particular area is relatively more concentrated or stronger than the industry’s concentration in the base area. Industry LQs help define which industries make the regional economy unique and are potentially “export-oriented.”

The Australian Bureau of Statistics uses the Australian and New Zealand Standard Industrial Classification (ANZSIC) system to categorise industries based on similar productive activities. This classification system is set up hierarchically with 4 levels; level 1 (divisions), level 2 (sub-divisions), level 3 (groups) and level 4 (classes). Level 1 is the broadest grouping of business and level 4 is the finest. Figure 8 shows ANZSIC level 1 industry location quotients in Bathurst LGA, with New South Wales total employment as the base area.

In the Bathurst region Agriculture, Forestry and Fishing have the highest LQ. Public Administration, Education and Training have the next highest and this is typical of a large hub city.

These industries are more concentrated in Bathurst relative to New South Wales, and therefore have competitive advantages as well.

Figure 8: ANZSIC Level 1 Industry Location Quotients (2016) Source: ABS Data



Community Engagement Survey Figures (Page 19)

Figure 1: Breakdown of Rankings for Goal 1

Source: Bathurst Regional Council Survey

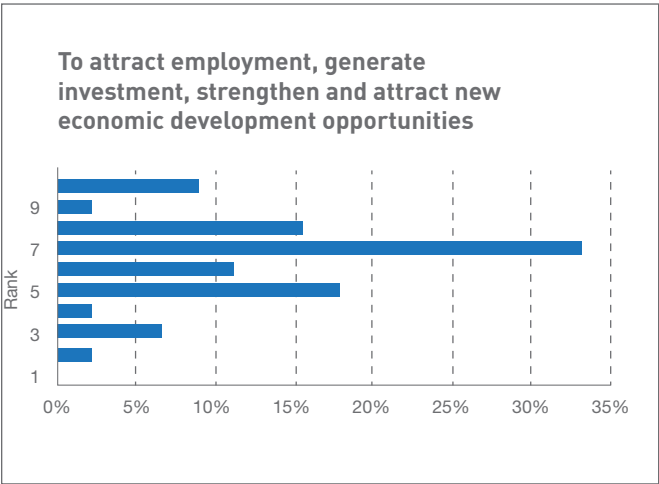


Figure 2: Breakdown of Rankings for Goal 2

Source: Bathurst Regional Council Survey

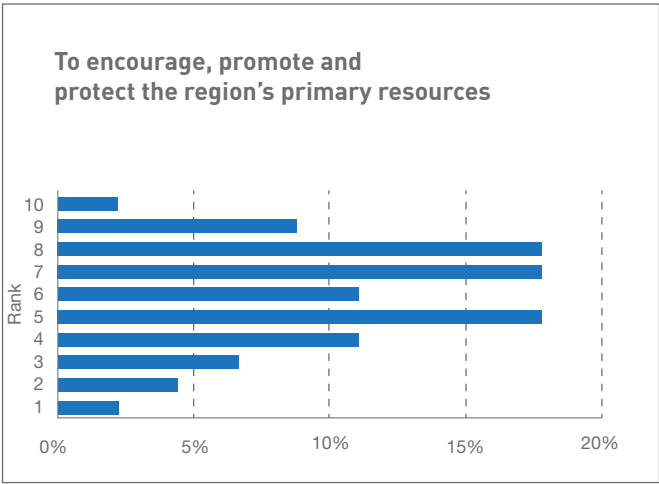


Figure 3: Breakdown of Rankings for Goal 3

Source: Bathurst Regional Council Survey

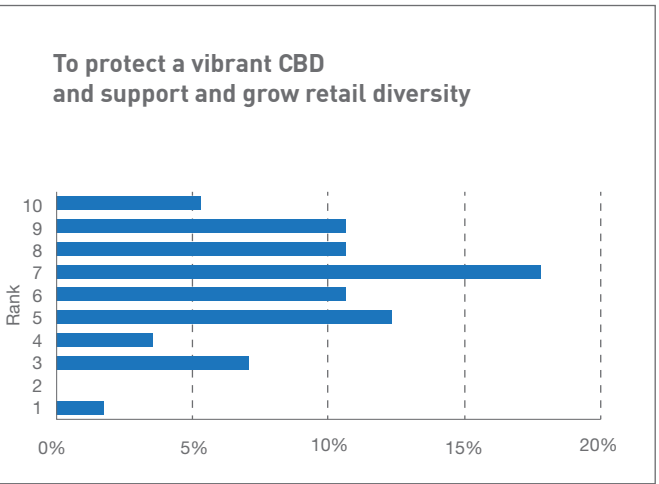


Figure 4: Breakdown of Rankings for Goal 4

Source: Bathurst Regional Council Survey

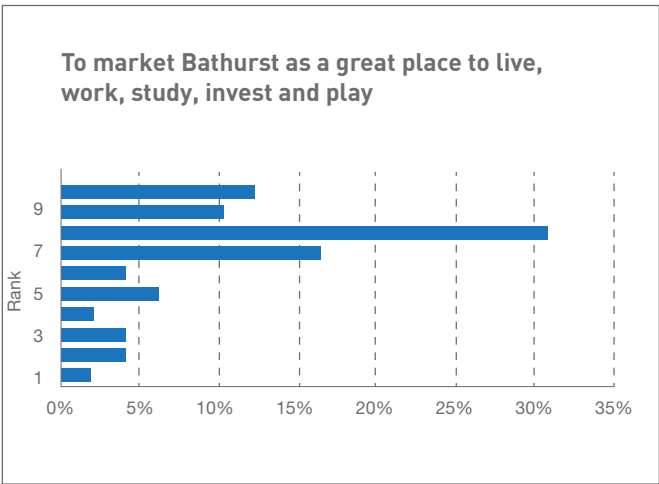


Figure 5: Breakdown of Rankings for Goal 5

Source: Bathurst Regional Council Survey

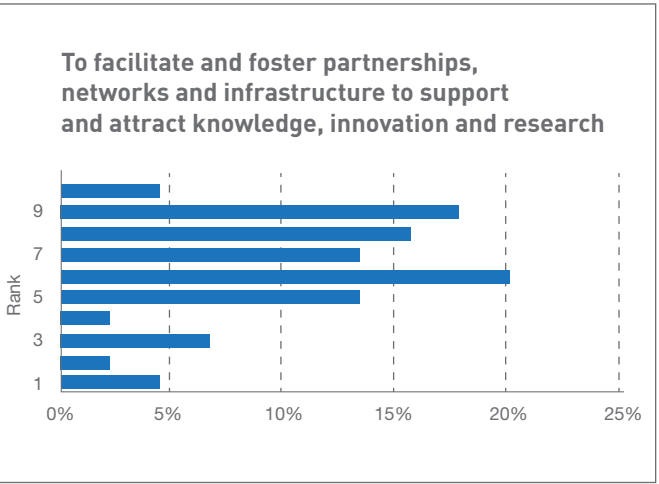


Figure 6: Breakdown of Rankings for Goal 6

Source: Bathurst Regional Council Survey

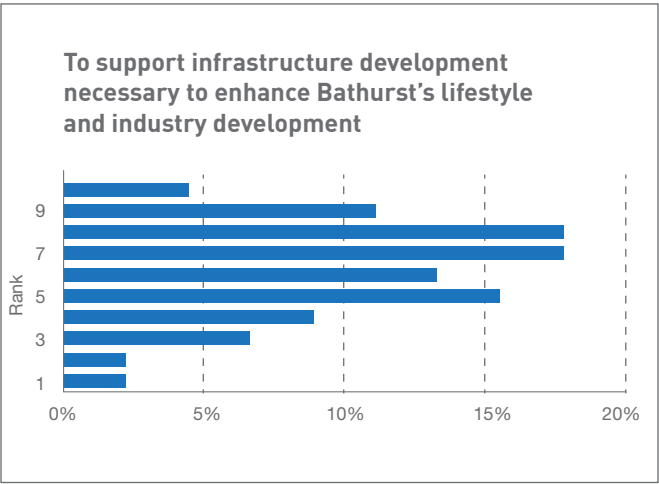


Figure 7: Breakdown of Rankings for Goal 7
Source: Bathurst Regional Council Survey

