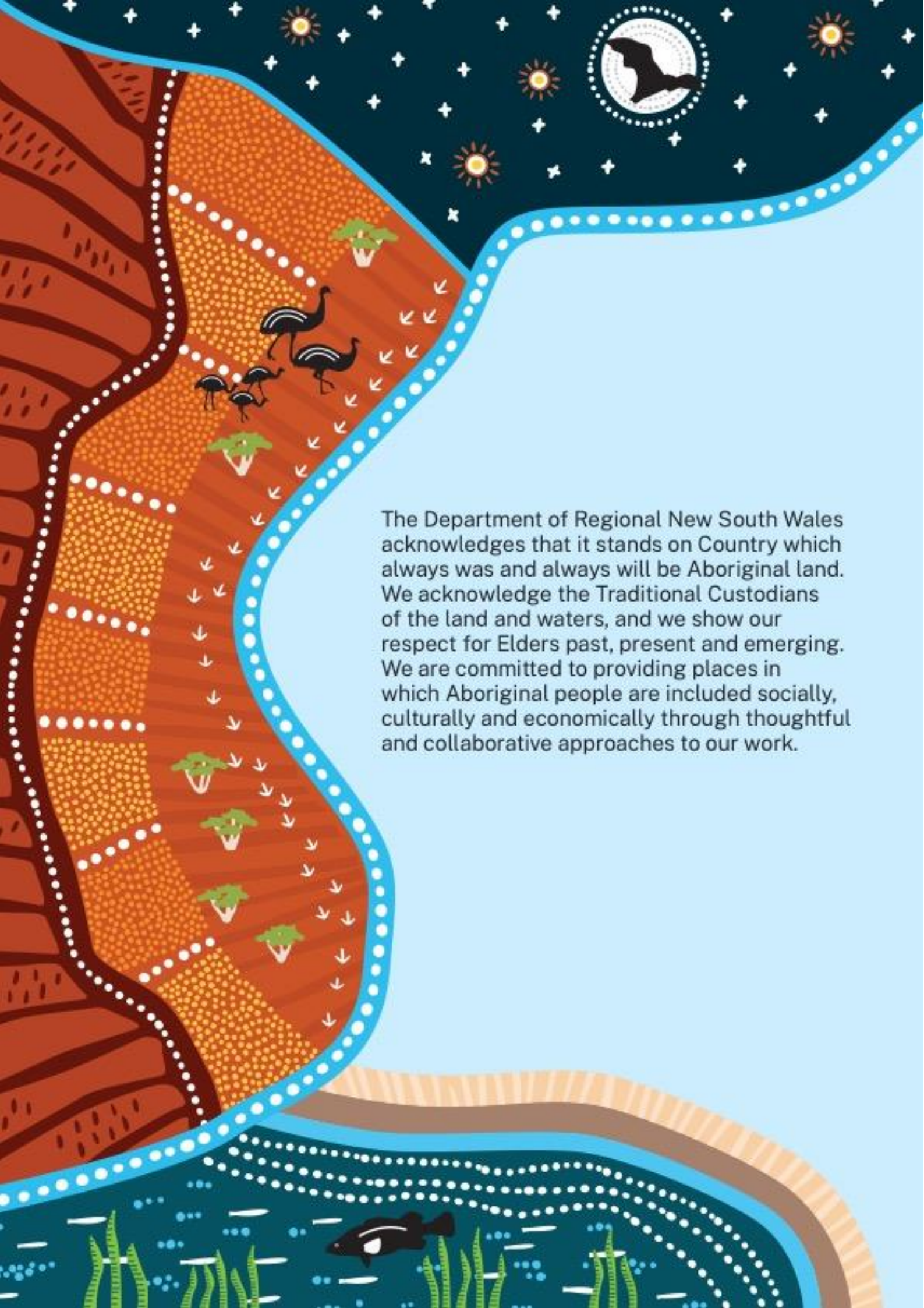


Lower North West Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Lower North West region to the development of the 2023 REDS update, in particular staff from Gunnedah, Liverpool Plains and Tamworth councils. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS update project.

On Country – Artwork by Mumbulla Creative

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant Emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a River Redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: Jacarandas in bloom in Gunnedah. Photo credit: Gunnedah Shire Council

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1. Executive summary

Changes in the Lower North West region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The Lower North West region has seen significant investment since 2018, with additional projects in the planning or delivery stages



The **\$53m Gunnedah Hospital Redevelopment**.



Establishment of the **Tamworth Business Park**.



Over **\$100 million** invested into **road and rail upgrades and intermodal facilities**.



\$4 million committed to deliver the **Gunnedah Airport upgrade**.



\$47 million to establish the **University of New England Tamworth Campus**.

The Lower North West region has experienced sustained population growth since 2018, which has been accompanied by low housing vacancy rates and increasing job vacancies



+ **1.6%** population growth since 2018.



Housing vacancy rates sit at **1.2%**, with median house prices rising by **an average of 35%** across the region since 2018.



The proportion of the population over 55 years has **remained relatively consistent** since 2018.



Unemployment rate has remained relatively stable since 2018, with **job vacancies** in the region reaching an all-time high of **1,456** in 2022.

Key engine and emerging industries including agriculture, mining, tourism and electricity generation are driving growth in the region's economy



Agriculture

+ 7.2% Year-on-Year (YoY) growth from 2011-2020

\$ 475 million Gross Value Added (GVA) in 2020

3,123 jobs supported in 2021



Mining

+ 6% YoY growth from 2011-2020

\$ 426 million GVA in 2020

1,306 jobs supported in 2021



Tourism

+ 2.4% YoY growth from 2011-2020

\$ 310 million visitor spend in 2021

6,261 jobs supported in 2021



Energy supply (including renewables)

+ 2.9% YoY growth from 2011-2020

\$ 159 million GVA in 2020

404 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Lower North West highlighted housing availability, water security and addressing skills and workforce shortages as key priorities for the region.

Housing availability



Enhancing housing supply in the region to support workforce needs associated with major project delivery and industry growth was highlighted as a critical priority.

Skills and workforce shortages



Widespread skills and workforce shortages were noted as a major constraint to business and industry growth in the region.

Water security



Stakeholders outlined that achieving long term water security for town and industry supply as a key regional priority in order to support growth and enhance resilience against future shocks.

Lower North West REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Leverage existing infrastructure and unique offerings to support growth in key sectors, including agriculture and tourism.</p>	<ul style="list-style-type: none"> • Continue to invest in infrastructure improvements to air and rail, particularly connections to the Tamworth Intermodal Freight Terminal. • Promote the region’s events-based and nature tourism offerings by supporting investment in tourism infrastructure, promoting the region’s recreational opportunities, and leveraging existing events such as AgQuip. • Explore opportunities to improve visitor accommodation supply for major events. • Activate residential lands to increase housing supply by supporting investment in enabling infrastructure. • Collaborate with education providers and industry to deliver courses aligned to future industry needs as part of a workforce strategy for the region.
<p>Build the region’s agriculture sector, focusing on support for both traditional strengths in broadacre cropping and livestock as well as growing intensive horticulture and value-add processing activities.</p>	<ul style="list-style-type: none"> • Engage with NSW Government agencies and industry stakeholders to attract investment in agricultural innovation targeting food production, and to address barriers to the expansion of intensive horticulture and poultry farming. • Identify opportunities to activate new industrial lands for expansion in food processing facilities, particularly for the upcoming Namoi Regional Job Precinct (RJP) and renewable energy investments.
<p>Secure future growth in Tamworth by resolving water security issues.</p>	<ul style="list-style-type: none"> • Improve water security in the region by implementing the Namoi Regional Water Strategy, with a focus on protecting and enhancing natural water systems, improving water storage capacity, developing water use efficiency measures and identifying alternative water sources to diversify supply.
<p>Reduce unemployment by improving connections between industry, local education and employment initiatives.</p>	<ul style="list-style-type: none"> • Investigate designated migration agreements to encourage return of skilled migrants and the seasonal workforce. • Identify and deliver developments and initiatives which can improve liveability and access to quality services, including through leveraging the University of New England Tamworth campus to attract specialists and health services into the region. • Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.

2. About the 2023 REDS update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mouse plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: The Golden Guitar in Tamworth. Photo credit: Tamworth Regional Council



Figure 2: The historic Quirindi Post Office. Photo credit: Destination NSW.

3. About the Lower North West region

The Lower North West FER is formed by a group of local government areas (LGAs) in the southern end of the New England North West region of NSW including Tamworth Regional, Gunnedah Shire, and Liverpool Plains LGAs. The major regional city in the Lower North West region is Tamworth, with Barraba, Gunnedah, Kootingal, Manilla, Quirindi and Werris Creek representing other key population centres. The region also incorporates much of the upper catchment area of the Namoi River, a tributary of the Murray-Darling River system.

Total area covered (km ²)	19,954
Population (2021)	84,345
Gunnedah Shire	13,085
Liverpool Plains	7,608
Tamworth Regional	63,652
Size of the economy (2020)	\$5.395 billion
Total employment (2021)	37,082

Source: ABS Estimated Resident Population (2021), REMPLAN (2020), ABS Census (2021)



Figure 3: Map of the Lower North West Functional Economic Region.

4. The 2018 Lower North West REDS



In the 2018 REDS, the region was actively pursuing growth in its key industry specialisations, particularly in agriculture and mining. Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the strategy's approach to enabling economic development in the region.

2018 Lower North West strategies

	Deliver key infrastructure as a foundation for growth
	Provide a positive, supportive environment to facilitate business growth and investment
	Support and leverage key sectors
	Position and promote the Lower North West region as a location of choice





2018 Lower North West specialisations

The industry specialisations below were identified as comparative advantages for the Lower North West region in the 2018 REDS, based on employment concentrations in industry sectors.

	Agriculture, forestry, and fishing
	Mining

2018 Lower North West endowments

The Lower North West is home to a range of physical, institutional, built and human endowments. The endowments listed below help enable success and growth across the region's industry specialisations.

Endowment	Relevant 2018 specialisation
Location, accessibility, and connectivity (air, road, and rail infrastructure)	
Highly productive agricultural land	
Significant mineral resources	
Strong lifestyle attributes (affordable land, access to quality services, and 'country lifestyle')	

5. The big picture: shocks and trends impacting the Lower North West region since 2018



Figure 4: View from Oxley Scenic Lookout. Photo credit: Tamworth Regional Council

Significant events impacting major industries

A sustained period of drought, followed by flooding and the mouse plague, had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses, particularly those in visitor economy, suffering from the impacts of movement and operating restrictions. During the period 2018 to 2022, the region had 14 disaster declarations^[1] and received \$44.74 million in disaster recovery grants. Building community resilience against future events and ensuring the growth of key industries post-recovery has been a focus for the region since 2018.

Drought

The Lower North West was in severe drought from 2018 to 2020.^[2] The region's key agricultural sector was significantly impacted by water shortages, particularly in Tamworth. In 2019, Peel River – a major water source for the Namoi region – was at risk of running dry, while a lack of groundwater reserves triggered two years of stringent water restrictions.^[3]

Reduced water allocations reduced farming activity around the area. The NSW Government provided \$15 million in support for downstream water users to buy and cart water as part of its response to the intense drought conditions.^[4]

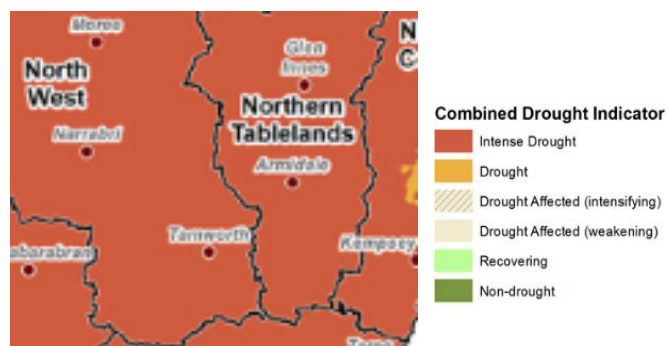


Figure 5: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries, 2022)

COVID-19

The COVID-19 pandemic significantly impacted business as usual activities, with 48% of businesses in the region reporting that COVID-19 negatively affected their business.^[5] There was a sustained increase in income support recipients in the acute phase of the pandemic in 2020, with Jobseeker recipients rising by 40%. While health care card recipients rose 17% from March to June 2020.^[6] Tourism Research Australia data indicates that 2021 spending levels were down \$166 million on 2019 levels as a result of a net decrease in overnight and day travel.^[7]

Floods

Severe storm and flooding events since 2018 account for 10 of the 14 natural disaster declarations in the Lower North West region.^[1] Flooding events have caused major damage to local infrastructure, particularly local roads and visitor facilities, and also required the temporary closure of national parks on multiple occasions.^{[8][9]}

In 2022, the region continued to face flooding events, particularly around the Peel and Namoi Rivers, with Tamworth experiencing no less than seven flood events.^[10] Major repeated flood events in the region in September 2022 led to significant damage to public infrastructure, inundation of some low lying properties, as well as ongoing impacts on output in the agriculture sector due to sustained periods of crops being waterlogged.^[11]


Mouse plague



The region was significantly impacted by the extended mouse plague event that occurred in 2021, with parts of the region experiencing among the highest rates of mouse infestation.^[12] Mice caused substantial damage to residential properties, infrastructure and equipment across the region, which even included interrupting mobile coverage as telecommunication cables were damaged.^[13] The agricultural sector was significantly impacted by the plague, with crops and stored feed destroyed or badly damaged, resulting in significant costs associated with mouse control, as well as significant impacts on productivity and farm output across the region.^[14]

To support impacted communities, the NSW Government made available up to \$95 million for primary producers in financial need, and \$45 million for the Small Business and Household Mouse Control Rebate. In the Lower North West region, a total of \$4.28 million was paid to 8,456 small business and household recipients through the rebate program.^[15]

Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate and migration have played a significant role in the Lower North West region's economy since 2018 and are likely to continue to have a strong influence on its future. With accelerated digital transformation, the impacts of successive natural disasters, and the shift towards net zero, the region faces both opportunities and risks in building resilience and leveraging competitive advantage associated with key trends.

Trend	Opportunities and risks
 Digital transformation	Digital technologies present wide-ranging applications across industries and can support the economic development of regions through increased productivity in engine industries. It also supports greater flexibility for people to work remotely, a trend accelerated by the COVID-19 pandemic. ^[16] Ensuring that digital infrastructure is fit for purpose is vital to continued economic growth as technology advances. Internet and mobile blackspots have been particular barriers to adopting technology in agriculture and ongoing investment is needed to continue to address these issues. Digital transformation can open up greater

Trend	Opportunities and risks	
	<p>Investment in improved telecommunications infrastructure since 2018 through the Connecting Country Communities program, including the rollout of multiple new mobile towers throughout the region to improve connectivity, will support growth and productivity in key sectors and services. Further investment will be needed in areas that continue to be impacted by poor mobile coverage and limited digital connectivity.</p>	<p>opportunities for small and medium businesses to access a wider market for their products via online channels.</p>
 <p>Changing migration patterns</p>	<p>As a result of the COVID-19 pandemic, many regional areas saw an influx of internal migration from city-dwellers seeking a lifestyle change, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200 from 2020 to 2021.^[17]</p> <p>While the Lower North West has not experienced a major additional influx of people, the region has been experiencing sustained population growth for several years. A key impact in the region has been significant local skills shortages, as part of broader challenges seen in many parts of regional NSW partially induced by extended COVID-19 international border closures.</p>	<p>Lifestyle offerings and remote working capability offer a new path and opportunity for the region to attract population and workers.</p> <p>Ensuring that infrastructure and service provision can meet the needs of a growing population presents a key challenge.</p>
 <p>Towards net zero</p>	<p>Although coal mining is will remain a key contributor to the Lower North West regional economy in the short- to medium-term, it will be impacted over time by the broader shift towards renewables in the medium-to long-term as part of the shift towards net zero.</p> <p>Being adjacent to the New England Renewable Energy Zone (REZ), the region is well placed to capitalise on the shift towards renewable energy generation. The Gunnedah and Tamworth solar farms and the Tamworth battery represent key projects in the region, with other developments in the planning stages. Investigations are also underway to consider significant circular economy opportunities in the region.</p> <p>Stakeholders highlighted the need to improve energy security in the region, and increase diversity of the energy mix for the benefit of the community and large energy intensive industries.</p>	<p>Energy intensive industries can increase energy security and benefit from access to local renewable energy sources.</p> <p>There are also supply chain opportunities that local businesses can capitalise on with large solar projects.</p> <p>Circular economy opportunities exist across a range of products, with recycling of solar panels highlighted by stakeholders as an area of potential for the region.</p>

Trend	Opportunities and risks
<div data-bbox="87 235 167 313" data-label="Image"> </div> <p data-bbox="87 331 247 398">Rising uncertainty</p> <p data-bbox="359 235 1029 481">The region has experienced a succession of extreme climatic events since 2018, including drought, and the mouse plague brought on by wet conditions after drought and floods. Climate events have had a significant impact on the community, local businesses and industries, in particular the agriculture sector.</p> <p data-bbox="359 492 1029 705">With the frequency and intensity of these events anticipated to increase,^[18] there is a need to enhance climate resilience. Building community resilience in relation to health and wellbeing, alongside economic and infrastructure resilience, will need to be prioritised.</p>	<p data-bbox="1093 235 1428 369">Elevated risk of damage to major infrastructure assets due to natural disasters.</p> <p data-bbox="1093 392 1460 705">Increased risk of supply chain unreliability impeding local industries, particularly in agriculture and manufacturing, both from the impacts of climate change and as the cost of inputs increase due to global events.</p>



Figure 6: Aerial view over Tamworth CBD. Photo credit: Tamworth Regional Council.

6. Responding to change: initiatives and investments since 2018



Figure 7: Aerial view of fields and mountains around Oxley Highway, Gunnedah LGA. Photo credit: Gunnedah Shire Council.

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The New England North West Regional Plan 2041 sets the 20-year strategic land use planning framework for the region, aiming to protect and enhance the region's assets and plan for a sustainable future across the region.</p>	
<p>The Gunnedah Shire Economic Development Strategy 2022-2026 aligns directly with council's Community and Strategic Plan and Future 2040 – Local Strategic Planning Statement. It provides a framework and directions for economic development with actions focused on economic diversification of key industries, population retention and growth, support for small-medium sized businesses and investment in projects to stimulate growth.</p>	
<p>The Liverpool Plains Shire Council Economic Development Strategy 2022-2025 aligns with council's Community Strategic Plan 2022-2032 and Local Strategic Planning Statement 2040. These documents highlight key objectives of driving job creation and long term sustainable economic development through 4 pillars of population growth, commercial freight, the visitor economy and resources and energy.</p>	

<p>The Tamworth Tomorrow Economic Development Strategy 2022-2026 complements Tamworth's Blueprint 100 - Our Community Plan 2023-2022 as the major strategic documents to guide the delivery of services and facilities over the next decade. The Tamworth Regional Council Local Strategic Planning Statement 2020 sets out the council's strategic plan for the next 20 years.</p>	
<p>The Tamworth Housing Strategy 2020-2025 outlines priorities associated with ensuring sufficient housing stock into the future by maximizing the delivery of affordable housing through all available funding options.</p>	
<p>The Royalties for Rejuvenation Fund and North West Expert Panel (established under the Mining Act 1992) seek to support long term economic diversification in coal mining regions, including through the funding of infrastructure, services, programs and other activities.</p>	
<p>Destination Networks Country and Outback Destination Management Plan (DMP) 2022-2030 guides industry on priorities, strategies and required actions that will drive the growth of the visitor economy at a regional level. It specifically calls out Tamworth as a food and beverage experiential destination.</p>	
<p>The Gunnedah DMP and Tamworth Visitor Economy Strategy 2022-2027 identify opportunities to build visitation and assess the product and infrastructure development required to realise these opportunities.</p>	
<p>The draft Namoi Regional Water Strategy (set to be finalised in 2023) sets out the long-term plan for water management in the region, with a key focus on long term water security across the Namoi Valley, supporting growth in the regional economy and removing barriers to Aboriginal water rights.</p>	



Figure 8: Scenic views across the town of Quirindi and the surrounding countryside. Photo credit: Destination NSW.

Significant investments since 2018

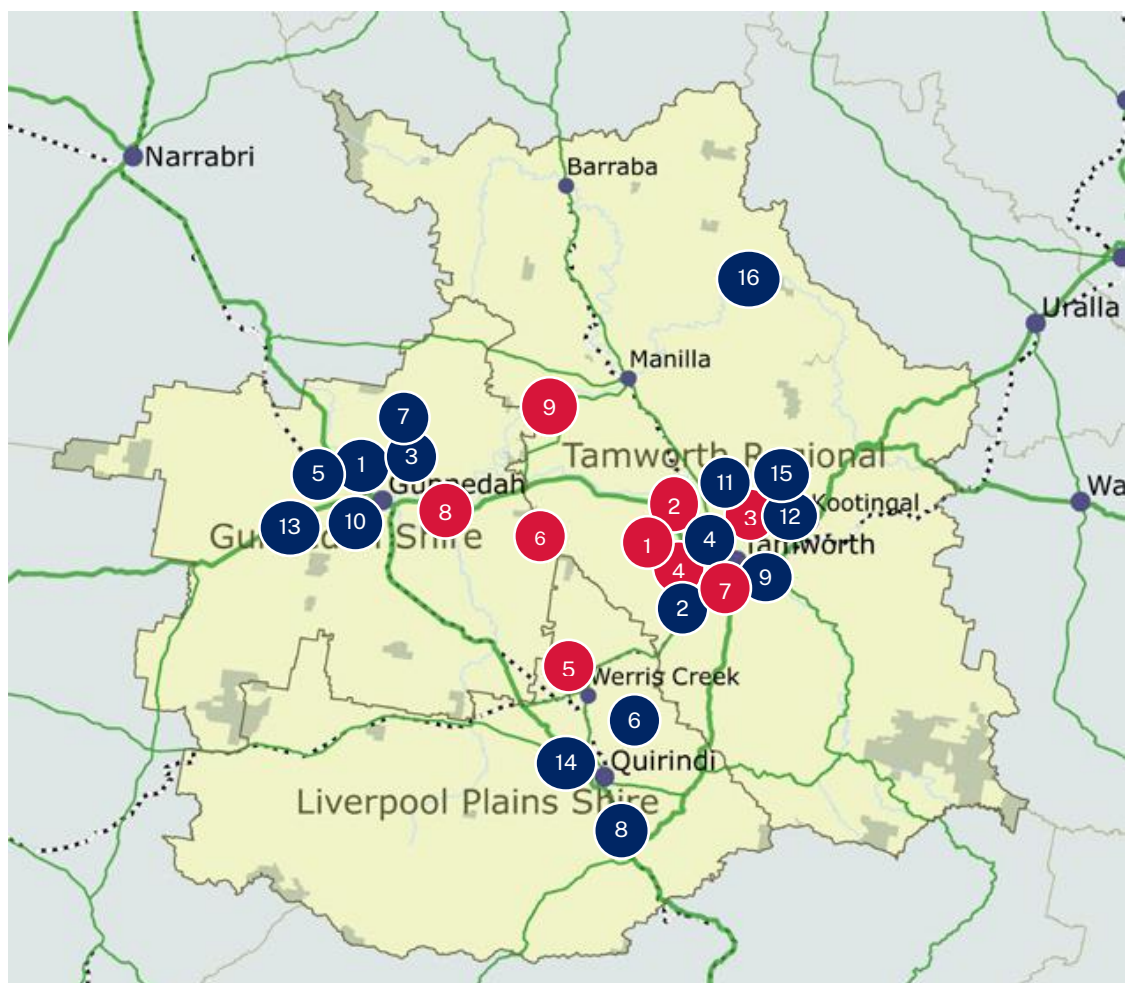


Figure 9: Significant investments in the Lower North West region since 2018.

As shown in Figure 9 and detailed below, since 2018 the Lower North West region has received significant local, state and federal government investments, as well as a range of private investments. These investments are at varying stages of progress, with some delivered, some underway, and some investments still in the planning stage. Public investments have included significant transport and logistics upgrades, new education and health facilities and a range of community and tourism infrastructure upgrades. Grant funding has played a key role in delivery of many projects.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Baiada Integrated Poultry Processing Facility	\$208 million	
2 Thomas Foods processing facility upgrade	\$2 million	
3 Leading Edge Data Centres Tamworth	Not available	

4	Tamworth Business Park	Not available	
5	Crawfords Freightlines intermodal rail facility	\$8 million	
6	Carroll Cotton Gin Expansion	\$20 million	
7	Tamworth Intermodal Freight Facility	\$8 million	
8	Gunnedah Solar Farm	\$200 million	
9	Rushes Creek Poultry Farm	\$55 million	

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Gunnedah Rail Bridge	\$61 million	
2 Tamworth intermodal rail line reopening	\$35 million	
3 Gunnedah Airport upgrade	\$4 million	
4 Tamworth Global Gateway Park	>\$43 million	
5 Gunnedah saleyards redevelopment	\$17.6 million	
6 Quipolly Water Project	\$36.9 million	
7 Gunnedah Water Treatment Facility	\$8 million	
8 Liverpool Plains Waste Management facilities	\$3.5 million	
9 University of New England Tamworth campus ¹	\$46.6 million	
10 Gunnedah Hospital redevelopment	\$53 million	

¹ Funding for this project is a combination of direct funding from UNE, a grant from the NSW Government, and a significant contribution from Tamworth Regional Council through the provision of land for the new University site.

11	Tamworth Banksia Mental Health Unit upgrade	\$14.6 million	
12	Major Tamworth sports facilities including the Northern Inland Centre of Excellence	>\$55 million	
13	Gunnedah Koala Sanctuary	>\$20 million	
14	Quirindi Aquatic Centre	\$6.6 million	
15	Tamworth Regional Astronomy and Science Centre	>\$2 million	
16	Infrastructure upgrades in Warrabah National Park and Boonalla Aboriginal Area	\$250,000	

Regional grant programs

The region has received \$198.56 million in grants since 2018. Key programs in the region have included the Regional Stimulus Package, with \$32.8 million invested in the region, along with the Regional Tourism Activation Fund (\$24.5 million), Resources for Regions (\$19 million) and Stronger Country Communities Fund (\$17.35 million).

Grant category	Approved funding
Community	\$53.69 million
Economic	\$100.13 million
Disaster recovery	\$44.74 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.

7. The Lower North West region 2023 economic snapshot

The Lower North West has experienced stable, but slowing, population growth

The Lower North West region has experienced stable population growth over the past decade, although the rate of growth has slowed since the start of the COVID-19 pandemic. A key focus is needed on attracting and retaining people to the region in the prime working age cohort.

Population growth

The region saw an average population growth rate of 0.72% between 2011 and 2021 (see Figure 10). The population growth rate has slowed since 2019, averaging 0.3% between 2019 and 2021. This may in part be due to COVID-19 related movement restrictions, including international border closures.

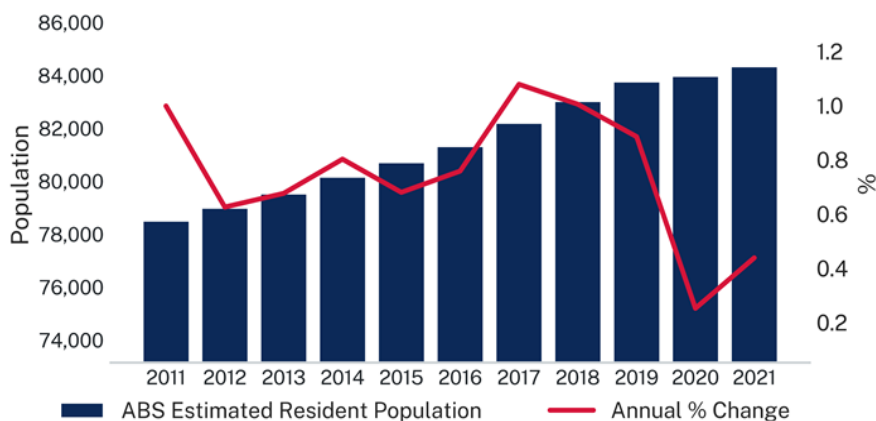


Figure 10: Lower North West FER population growth, 2011-2021 (ABS ERP, July 2022).

Population growth and retention was a focus area in the 2018 REDS. This needs to remain a priority, with a focus on ensuring availability of high quality infrastructure and services, adequate housing and achieving a high degree of liveability.

Demographic profile

The region currently has a higher proportion of people over 55 years old compared to the NSW benchmark (2.9% higher) (see Figure 11). The proportion of residents in the prime working age cohort (20-54 years) is about 6% lower than the NSW average. The region has a higher proportion of residents in the 0-19 years age group compared with NSW, but this drops off quickly in the 20-24 cohort, which suggests young people may move from the region once they complete school.

A continued focus on better matching of education opportunities, skills and job opportunities can help to retain young people in the region, which can be supported by the development of the University of New England (UNE) Tamworth campus. During consultation participants noted a distinct lack of coordination between education providers in articulating education/training to jobs pathways. A focus is also needed on enhancing community amenity through ongoing investment into social infrastructure that supports attraction and retention of skilled workers in the prime working age cohort.

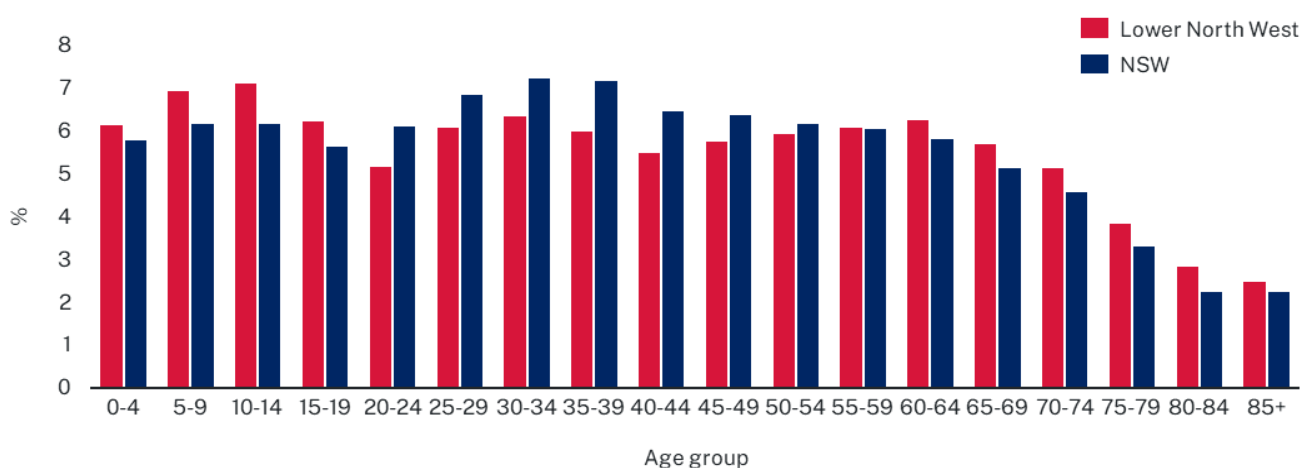


Figure 11: Lower North West FER population by age, 2021 (ABS ERP, July 2022).

Housing availability in the region has declined since 2018

The region has faced a decline in housing availability since 2018, with sustained increases in house prices recorded. This may increase pressure on lower income households with flow on impacts for social housing demand, and will also impact the ability to support ongoing population growth.

Housing availability

Residential vacancy rates in the region have dropped from 3.9% in May 2020 to 1.2% in August 2022 (see Figure 12). Stakeholders have reported that a shortage of one or two bedroom rental properties has increased the number of locals seeking social housing in recent years, as evidenced by long social housing wait times in Tamworth and Gunnedah.^[19]

The region has however continued to see a steady flow of residential building approvals, which if translated into dwelling completions can ensure a consistent supply of new housing stock for the region. However, supply and demand analysis of large lot and rural residential lands suggests there may be future development constraints in the Tamworth area, as some zoned lands cannot viably be developed due to servicing constraints, biodiversity protections and/or natural hazards.^[20]

Housing affordability

Despite heightened demand for housing, house price growth in the region has been lower than seen in other parts of regional NSW. Between June 2018 and June 2022, median house prices in the Gunnedah LGA increased by 24% to \$390,000, by 55% in the Liverpool Plains LGA to \$283,000 and by 25% in the Tamworth LGA to \$430,000.^[21]

The large number of infrastructure projects both underway and proposed in the region (such as the Gunnedah Airport upgrade, the Tamworth Intermodal Freight Terminal, renewable energy projects and the Namoi Regional Jobs Precinct) is likely to drive ongoing demand for housing, which may drive further growth in property prices.

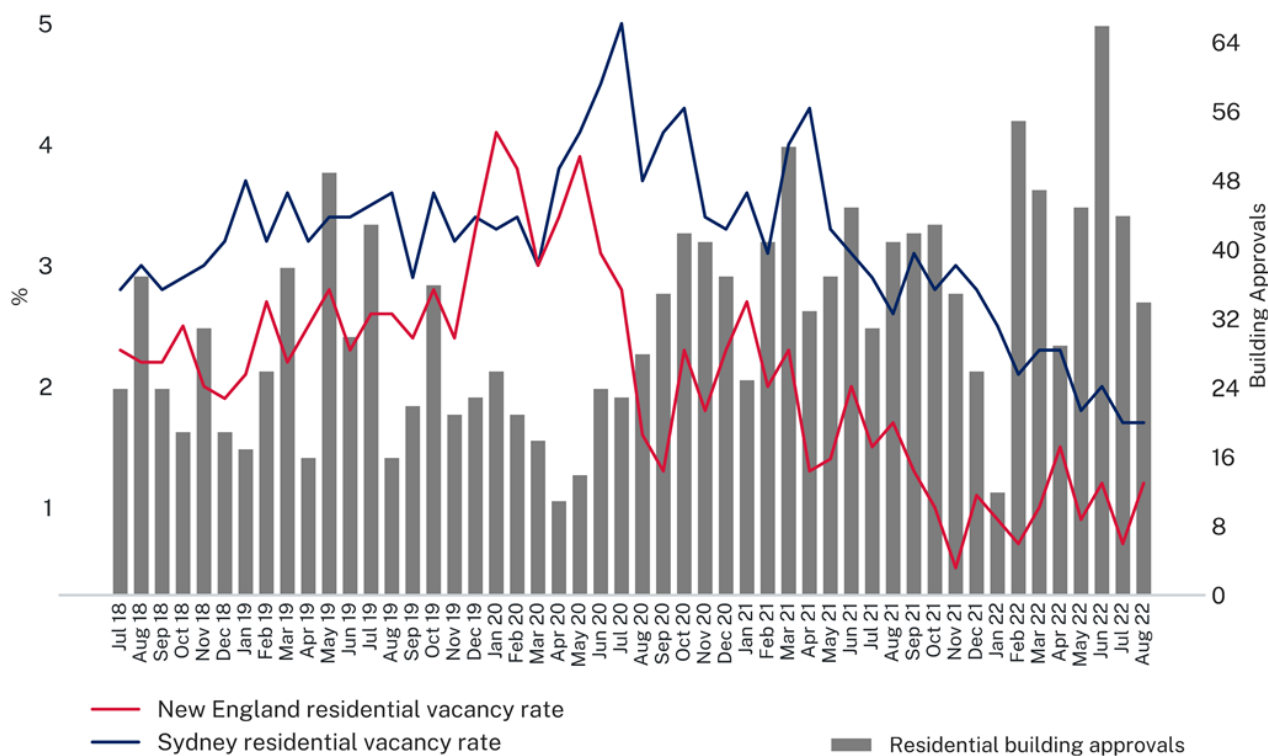


Figure 12: Lower North West FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region.

Unemployment has remained relatively stable since 2018, while job vacancies have more than doubled since mid-2020

The region identified a need to further develop skilled workforce attraction and retention initiatives in the 2018 REDS. This continues to represent a key challenge due to a tight labour market.

Employment

As of June 2022, the three local councils within the region had an average unemployment rate of 5.8%, above the NSW benchmark at 3.3% (see Figure 13). The region's unemployment rate increased following the first wave of COVID-19 in March 2020 but dropped below the state average after December 2020.

The recent uptick in unemployment, despite widespread entry-level workforce shortages and increasing job vacancies, indicates a potential need for targeted local employment initiatives aimed at enhancing skills development and training opportunities, to ensure local workforce capability is well matched to the needs of business and industry in the region.

Job vacancies in the broader Tamworth and North West region have tripled since mid-2020, reaching a record 1,456 in August 2022 (see Figure 14). Occupations with a particularly acute need reflect both entry level and skilled roles and include sales assistants (106 job advertisements), administrative workers (114), carers and aides (107), and automotive and engineering trade workers (70).

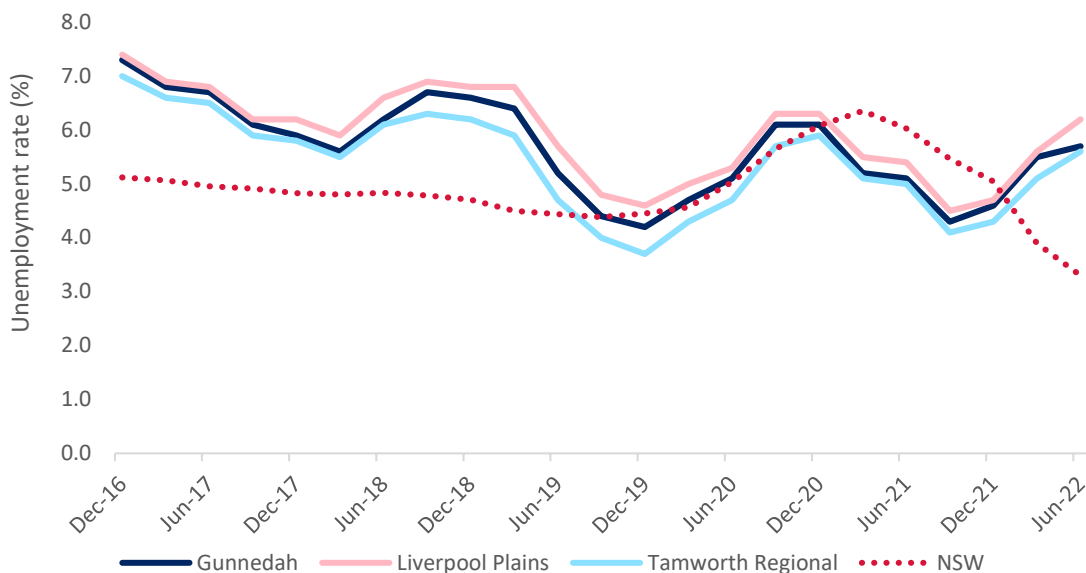


Figure 13: Lower North West unemployment rate (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 14: Job vacancies, Tamworth and North West region (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI - National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region.

Aboriginal employment

Over the past five years, significant improvement has been achieved in employment outcomes for Aboriginal people in the Lower North West region. The Aboriginal unemployment rate has dropped from 16.6% in 2016 to 11.4% in 2021. However, this rate is above the NSW Aboriginal unemployment rate of 9.8% and the NSW unemployment rate of 4.9%.

A continued focus is needed on ongoing wide spread collaboration to support Aboriginal economic development opportunities, including key stakeholders such as Local Aboriginal Land Councils, traditional owners, businesses and all levels of government. This can help ensure the positive trend of increased Aboriginal economic participation can be sustained into the future and can translate into long term benefits for the Aboriginal community in the region.

Aboriginal unemployment rate: Lower North West	2011	19.7%
	2016	16.6%
	2021	11.4%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021



Figure 15: Murals on Barraba Silo. Photo credit: Tamworth Regional Council.

Lower North West 2023 engine and emerging industries

The Lower North West region has a \$5.4 billion economy. In spite of significant shocks since 2018, the Lower North West region's engine industries have remained a key source of stability for the regional economy by maintaining consistent growth. The relative strength of each industry is measured using Location Quotient (LQ) analysis¹ as displayed in Figure 16, where industry size correlates with bubble size.

Engine industries

Agriculture (LQ of 4.48) has continued to be a key specialisation for the region, generating \$476 million in GVA in 2020 and recording average annual growth of 7.2% between 2011 and 2020. The sector is driven largely by the sheep, grains, beef and dairy sector (LQ of 6.5), which generated at least 72.7% of the industry's output for the region. The next most significant subsector is poultry & other livestock (LQ of 5.6), which contributed \$69 million to GVA in 2020.

Mining (LQ of 1.77) is another core pillar of the local economy, with the sector contributing \$436 million to GVA in 2020. Coal mining (LQ of 1.9) is the dominant industry subsector, accounting for approximately 87.3% of the industry's output.

The **health care** industry was identified as an emerging specialisation in the 2018 REDS and has now grown into an engine industry, adding \$487 million in 2020. Residential care and social assistance and healthcare subsectors made a similar economic contribution, with an LQ of 1.2 and 1.3 respectively.

Although **tourism** is not a specialisation as measured by LQ analysis, it is an important sector in the region. The sector helps to diversify the economy and raise the profile of the region, which plays a part in supporting migration. In 2021, visitors to the region are estimated to have spent \$310 million (a 35% drop from pre COVID-19 spending).^[7] Nature based tourism, including national parks, contributes \$24.4 million in economic value to the region.^[22]

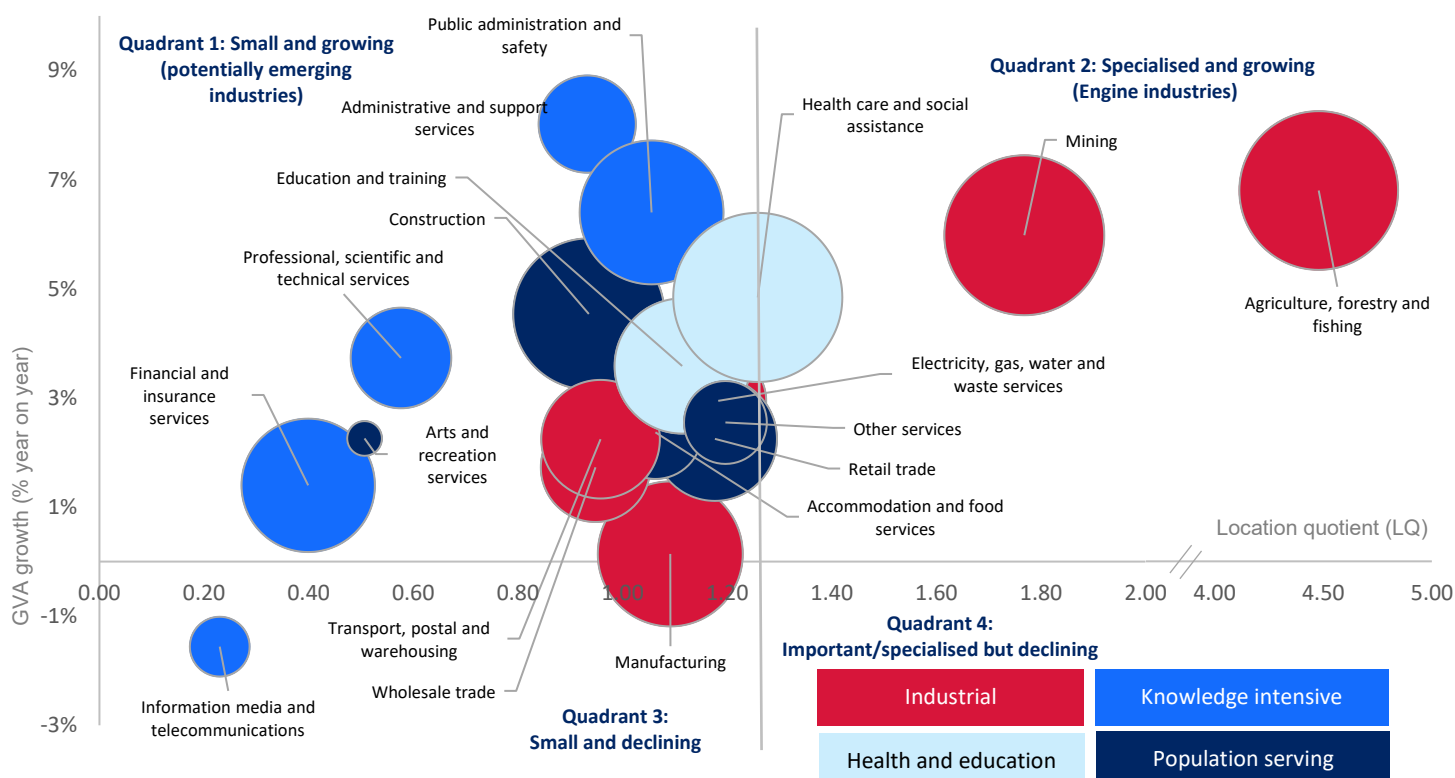


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used GVA data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

¹ LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.

Emerging industries

Public administration and safety demonstrated strong annual GVA growth over the past decade, averaging 6.4% from 2011 to 2020. Public administration and regulatory services was the strongest subsector performer, contributing \$226 million to the regional economy in 2020.

Energy supply (including renewables) also saw strong average annual growth of 2.9% between 2011 and 2020. Energy distribution is the dominant subsector, contributing \$118 million to the economy in 2020, with future growth likely to be supported by increased investment in the renewable energy sector.

Additionally, **construction** demonstrates strong growth and potential as an emerging specialisation for the region. The sector saw 4.5% average annual growth between 2011 and 2020, likely driven by a number of infrastructure developments. The emerging capability of the region's construction sector can serve as a key enabler across both engine and emerging industries, especially for boosting housing capacity and supporting renewables projects.

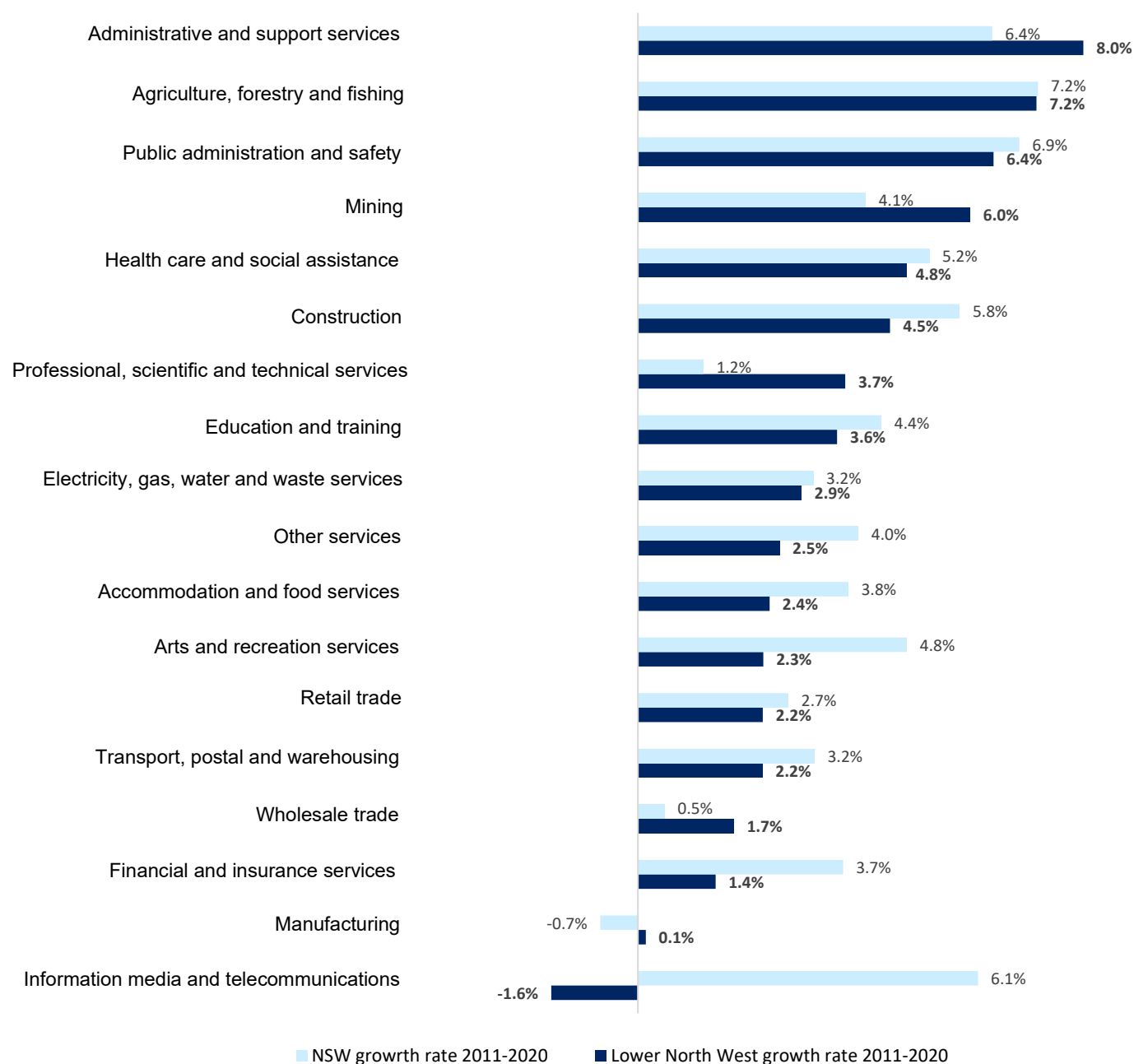


Figure 17: Change in GVA by Industry (% YoY), 2011-2020 (REMPPLAN, 2020).

Lower North West 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a number of endowments underpinning the Lower North West's economy and regional competitiveness. Despite recent shocks impacting these endowments, consultation outcomes and analysis undertaken in preparing the 2023 REDS Update have confirmed they that remain valid. These key endowments are:

- Location, accessibility, and connectivity (air, road, and rail infrastructure).
- Highly productive agricultural land.
- Significant mineral resources.
- Strong lifestyle attributes (affordable land, access to quality services, nature and recreational experiences and a 'country lifestyle').

New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have led to the creation of new endowments which can also underpin new economic opportunities and future specialisations in the region.

+ Namoi Regional Jobs Precinct	The Namoi Regional Jobs Precinct will focus on making improvements in planning to help support sustainable growth in intensive agriculture and livestock production in the region.
+ Tamworth Intermodal Freight Terminal	The Tamworth Intermodal Freight Terminal will enable suppliers, businesses and producers to have competitive access to ports for exports, and will also serve as a regional hub for inbound freight.



Figure 18: A vibrant children's playground in Gunnedah. Photo credit: Gunnedah Shire Council.

8. Looking ahead: strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

Mining

The mining sector continues to be a key driver of economic growth in the region, but is facing challenges associated with workforce shortages and will need to adapt to the shift towards net zero.

GVA (2020, \$m)	436
Employment (2021)	1,306
LQ score (2020)	1.77
LQ coal mining (2020)	3.6
LQ oil & gas extraction (2020)	3.6

Strengths

- Coal mining in the Gunnedah Basin is the major mining activity in the region, contributing more than 87% of total GVA for the industry.
- Other resources extracted commercially in the region include zeolite from the Liverpool Plains Shire, tungsten, copper, gold and hard-rock aggregate. The region also has significant natural gas reserves.
- The sector is well supported by key facilities such as the Gunnedah Coal Handling and Preparation Plant, strong road and rail links and transport, professional and commercial services companies.

Vulnerabilities

- The coal mining industry will need to adapt to the shift towards clean energy and related targets adopted to the achievement of net zero.
- The sector is vulnerable to the impacts of supply chain disruptions, fluctuations in key input costs, such as energy and freight, and challenges associated with water security.
- Workforce shortages continue to remain a key challenge, with strong competition between mining companies for skilled talent. A lack of sufficient worker accommodation is also an impediment.

Opportunities

- Expansion of existing mines such as the Vickery Coal Mine extension, which was approved in 2021 and is expected to support 950 jobs, will continue to underpin growth in the sector.^[23]
- Continued investments to upgrade road, rail and air infrastructure in the region will continue to support the efficient movement of output for export from the mining sector.
- With the shift to net zero, long term opportunities will exist associated with the repurposing of land and infrastructure, and for the sector's skilled workforce to support growth in emerging industries.
- Support for actions that drive economic diversification will be available through the Royalties for Rejuvenation Fund, with decision making to be guided by the North West Expert Panel.

Agriculture

Agriculture continues to be a key economic strength of the region. The breaking of the drought in 2020 has led to a very strong period for the sector, in particular areas such as Gunnedah that have a large amount of irrigation water available.

GVA (2020, \$m)	476
Employment (2021)	3,123
LQ score (2020)	4.48
LQ sheep, grain, beef & dairy (2020)	6.5
LQ poultry & other livestock (2020)	5.6

Strengths

- The region has highly productive agricultural land coupled with a favourable climate for production.
- The region is well known for high quality produce, with the region being an optimal location for sectors such as broadacre cropping, intensive livestock and poultry production.
- Significant road and rail investments to enhance transport infrastructure and connectivity in the region has assisted in driving the current economic success of the sector in the region.
- The region has strongly developed links between agriculture and key downstream processing facilities such as saleyards and processing plants for grains, legumes, oilseeds and leather.

Vulnerabilities

- Supply chain disruptions, high input costs (in particular fuel and fertiliser) and workforce shortages are impediments to realising the full potential of the post-drought agricultural boom.
- Uncertain water availability, particularly in the context of a changing climate, presents a challenge to industry expansion for both existing key strengths and emerging opportunities

Opportunities

- Investment in high-value, diverse agricultural activities that are targeted for export, such as high-value crops, food processing and packaged produce, as demonstrated by the upgraded Baiada poultry abattoir.
- The Namoi Regional Jobs Precinct will provide additional support for exploring opportunities associated with intensive agriculture and livestock production.
- Development of agritourism offerings can help promote the regional profile as a premium food producing region and provide opportunities for producers to diversify income streams.
- Agricultural innovations that leverage the region's professional service providers in agribusiness and agricultural engineering can help drive productivity growth and increase output value.
- Leveraging export efficiencies associated with the Tamworth Intermodal Freight Terminal.
- Opportunities to secure water availability by upgrading water infrastructure, for example around Dungowan Dam, and implementing water efficiency measures.

Tourism

Although not a key specialisation of the Lower North West economy, tourism plays an important role by helping to diversify the economic base of the region. Recent investments in new tourist attractions will complement the key role that longstanding major events play in attracting visitors to the region.

Visitor spend (2021, \$m) ^[7]	310
Employment (2021) ^a	6,261
LQ score (2020) ^b	0.78
LQ accommodation(2020)	1.3
LQ food & beverage (2020)	1.0

a Summation of ANZSIC 1 digit Retail trade, accommodation and food services, arts and recreation services

b LQ score is for the accommodation and food services industry.

Strengths

- The region is home to a number of unique major events that attract substantial visitors to the region, including the Tamworth Country Music Festival, Taste Tamworth Festival Farm Gate Trail and AgQuip, one of the world's largest agricultural events held in Gunnedah.
- The region encompasses a large geographic area that is rich in cultural heritage and contains a range of unique natural landscapes including Boonalla Aboriginal Area and Warrabah National Park.

Vulnerabilities

- The industry is vulnerable to externalities. This has been demonstrated by the impacts of the COVID-19 pandemic and associated travel and operating restrictions - total visitor spend in 2021 remained around 35% lower than pre-Covid-19 pandemic levels.
- The increasing frequency of natural disaster events increases the risk of damage to key natural landscapes that form an important part of the region's visitor economy offering.

Opportunities

- New tourist assets such as the Tamworth Astronomy & Science Centre, Gunnedah Koala Park, Quirindi Silo Art and the proposed Kokoda Trail Walkway can provide unique additional attractions that can further diversify the visitor economy offering and encourage more people to visit the region.
- Development of agritourism offerings, including farm-stays, cellar doors and experience-based offerings can help showcase the region's agricultural sector and high-quality produce.
- Ongoing investment to promote the region's natural and built tourism attractions can help draw new visitors to the region, and a focus on developing multi-day adventures and routes can help maximise the value that tourism brings to the region.
- High quality sporting infrastructure and sports with a strong level of community engagement can be leveraged to attract more regional, state or national sporting events to the region.
- The region has a number of significant Aboriginal cultural sites and areas that could support the development of new cultural tourism experiences. Cultural tourism can provide a mechanism to support Aboriginal business development and provide opportunities to enhance the economic prosperity of the Aboriginal community.

Electricity, gas, water and waste services

The region's energy sector may experience significant future growth given favourable climatic conditions for solar energy generation and close proximity to the New England Renewable Energy Zone (REZ).

GVA (2020, \$m)	159
Employment (2021)	404
LQ score (2020)	1.18
LQ electricity distribution (2020)	1.5
LQ gas supply (2020)	1.5

Strengths

- The electricity, gas, water and waste services industry experienced strong growth between 2011 and 2020, driven by the energy distribution sector that contributed \$118 million to GVA in 2020.
- The region has a hot semi-arid climate which is favourable for solar energy generation.
- Close proximity to the New England REZ can allow new renewable projects in the region to leverage the increased electricity transmission network capacity associated with the REZ.
- Significant renewable energy projects in planning or delivered in the region include the Bendemeer Solar Farm, Calala Battery, Gunnedah Solar Farm, Hills of Gold Wind Farm, Tamworth Battery, Tamworth Solar Farm and the Thunderbolt Energy Hub. A number of smaller, community sized facilities are also planned across the region.

Vulnerabilities

- Large-scale energy generation projects often require a large amount of space, which is an increasingly in-demand resource given commercial, industrial and residential needs.
- Potential land use conflicts related to the use of high quality agricultural land for renewable energy projects also represents a key challenge for the sector.
- The construction of major renewable projects may create additional pressures on the regional housing market, given the need for housing to accommodate workers during the construction phase.

Opportunities

- Increased availability of renewable energy sources in the region can also aid the efforts of other key sectors to achieve decarbonisation, in particular industries that require significant energy input.
- The sector can also support the development of industry opportunities in circular economy processing, such as initiatives to increase the recycling of solar panels.

Key themes in stakeholder consultation

The breaking of the drought in 2020 has led to a sustained period of strong performance in the agriculture sector in the Lower North West. Significant investments in intensive agriculture and transport infrastructure were highlighted by stakeholders as key factors supporting current economic success in the region. However, barriers to future growth identified during consultation included reduced housing availability and affordability, challenges associated with attracting and retaining a skilled workforce in the region and the key need to achieve long term water security.

Housing availability

Stakeholders outlined how the tightening housing market in the region is hampering workforce attraction and retention efforts. Ensuring adequate housing supply is essential to meeting workforce needs for major project delivery, and also to support growth in key engine industries in the region. Stakeholders also highlighted the pressure that lower housing availability and affordability places on lower income members of the community, with consequential impacts on demands for social housing.

Skills and workforce shortages

Consultation highlighted concerns that skills and workforce shortages are hindering industry growth, in particular shortages associated with engineering trades, healthcare and the agricultural seasonal workforce. Stakeholders highlighted a lack of available skills training as a key impediment to ensuring the local workforce can meet increased demand for skilled labour, and that action is needed to better align education and training offerings with the needs of business and industry.

Water security

The region's key industries are heavily reliant upon water as a key input to production. Stakeholders highlighted that Tamworth has been flagged as having inadequate water security. Other parts of the region also continue to face challenges associated with water security for both town supply, business and industrial use. Investing to deliver long term water security was highlighted as a key priority for the region, and critical to ensuring continued farming operations, supporting business growth and development, and enhancing the resilience of the region against the impacts of climate change and future drought events.

Lower North West REDS - 2023 Update strategies

In response to the agricultural boom experienced in the region since the breaking of the drought, stakeholders highlighted the need to develop revised strategies that reflect current key priorities for economic development in the region. The number of strategies has been reduced and the focus placed on facilitating growth to leverage the success of the region since 2018.

Reflecting these priorities, the 2023 REDS Update strategies for the Lower North West are:

New	Leverage existing infrastructure and unique offerings to support growth in key sectors, including agriculture and tourism.
New	Build the region's agriculture sector, focusing on support for both traditional strengths in broadacre cropping and livestock as well as growing intensive horticulture and value-add processing activities.
New	Secure future growth in Tamworth by resolving water security issues.
New	Reduce unemployment by improving connections between industry, local education and employment initiatives.

Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short- to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New Enablers		Lead and support	Rationale
Leverage existing infrastructure and unique offerings to support growth in key sectors, including agriculture and tourism.	Infrastructure	Continue to invest in infrastructure improvements to air and rail, particularly connections to the Tamworth Intermodal Freight Terminal.	Transport for NSW (TfNSW) , Department of Regional NSW (DRNSW), Local councils	Investment into new transport infrastructure is critical to supporting ongoing industrial and business growth.
		Promote the region's events and nature based tourism by supporting investment in tourism infrastructure, promoting the region's recreational opportunities, and leveraging existing events such as AgQuip.	Local councils , Destination NSW, National Parks and Wildlife Service (NPWS)	Growth in the visitor economy can be supported by creating a point of difference for the region, and ensuring adequate accommodation for visitors.
		Explore opportunities to improve visitor accommodation supply for major events.		
		Activate residential lands to increase housing supply by supporting investment in enabling infrastructure.	Local councils , Department of Planning and Environment (DPE), DRNSW	A focus is needed on ensuring adequate to meet workforce and tourism needs.
	People and skills	Collaborate with education providers and industry to deliver courses aligned to future industry needs as part of a workforce strategy for the region.	Training Services NSW , Local councils, TAFE NSW, Registered Training Organisations	There is a clear need to ensure a pipeline of industry ready skilled workers is available to support the agricultural sector.

Strategy	New Enablers		Lead and support	Rationale
<p>Build the region's agriculture sector, focusing on support for both traditional strengths in broadacre cropping and livestock as well as growing intensive horticulture and value-add processing activities.</p>	<p>Government, regulation and information</p>	<p>Engage with NSW Government agencies and industry stakeholders to attract investment in agricultural innovation targeting food production, and to address barriers to the expansion of intensive horticulture and poultry farming.</p>	<p>Local councils, DPE Planning, DRNSW, Local chambers of commerce, North West Royalties for Rejuvenation Expert Panel</p>	<p>Facilitate economic diversification and prosperity within the agricultural sector.</p>
	<p>Land use</p>	<p>Identify opportunities to activate new industrial lands for expansion in food processing facilities, particularly for the upcoming Namoi RJP and renewable energy investments.</p>	<p>DRNSW, DPE, Local councils, North West RfR Expert Panel</p>	<p>A focus is needed to ensure that sufficient land is available for growth in agri-processing.</p>
<p>Secure future growth in Tamworth by resolving water security issues.</p>	<p>Infrastructure</p>	<p>Improve water security in the region by implementing the Namoi Regional Water Strategy, with a focus on protecting and enhancing natural water systems, improving water storage capacity, developing water use efficiency measures and identifying alternative water sources to diversify supply.</p>	<p>Local councils, DPE Water, DRNSW</p>	<p>Increasing certainty and resilience of the region's water supply is critical for supporting the region's engine industries.</p>
<p>Reduce unemployment by improving connections between industry, local education and employment initiatives.</p>	<p>Skills and people</p>	<p>Investigate designated migration agreements to encourage return of skilled migrants and the seasonal workforce.</p>	<p>DRNSW, Regional Development Australia (RDA), Local councils</p>	<p>Ensure a pipeline of industry ready skilled workers are available to meet key workforce needs.</p>
	<p>Services</p>	<p>Identify and deliver developments and initiatives which can improve liveability and access to quality services, including through leveraging the University of New England Tamworth campus to attract</p>	<p>University of New England, Local councils, Local health network</p>	<p>The provision of quality services can improve liveability in the region and facilitate workforce retainment.</p>

Strategy	New Enablers		Lead and support	Rationale
		specialists and health services into the region.		
	Infrastructure	Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.	NSW Telco Authority, Local Councils, DRNSW	Improved digital connectivity can support increased uptake of technology in key sectors, while also supporting increased liveability in the region.



Figure 19: Gunnedah Town Hall. Photo credit: Gunnedah Shire Council.

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Figure 20: Tamworth Regional Astronomy and Science Centre. Photo credit: Tamworth Regional Council.