



WARRNAMBOOL
Economic
Development
& Investment
Strategy
2015 - 2020



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Warrnambool is the largest City in the Great South Coast region.



Summary

Warrnambool is the largest City in the Great South Coast region.

Our City is the major service centre in the region and provides an extensive range of services which extend well beyond the borders of the Warrnambool Municipal boundary.

Employment strengths are in the service sectors of health and community, education, food processing, government, retail trade and tourism. Industrial and business activities also occur in the City that supports the broader agricultural and other industry value adding activities.

Warrnambool is a highly liveable coastal regional city with a strong track record of steady and sustained population and economic growth. Warrnambool's ongoing economic challenge is to create employment opportunities in the City to keep pace with population growth.

Based on population growth forecasts there will be a need for our City to create an additional 4,000+ new jobs over the next 20 years.

This Warrnambool Economic Development and Investment Strategy ("the Strategy") was developed in-house by Warrnambool City Council with input from many of our business and community leaders.

The purpose of the Strategy is to provide direction and promotion of the many initiatives considered most necessary to ensure continued growth and prosperity of our local economy.

This Strategy recognises that some initiatives may be beyond the direct control of Warrnambool City Council ('Council') but require a partnership with a combination of other levels of government, public sector entity or private enterprise.

As the regional capital of the Great South Coast, Warrnambool also plays a key role in providing employment opportunities for residents of neighbouring municipalities.

Some of the initiatives outlined in the document will have positive impacts that will extend well beyond the City of Warrnambool and benefit the Great South Coast region.

This Strategy will remain broad in focus and pointed towards 2020, but will have associated with it an annual Implementation Action Plan which further details actions, priorities, resources and responsibilities.

The list of priorities are extensive, however intentionally not exhaustive to provide adjustment to future changing market dynamics as well as new opportunities that may emerge during the implementation of the Strategy.





Warrnambool is a
highly liveable coastal
regional city.

Background

Council's previous Economic Development and Investment Strategy was developed and endorsed by Council in 2010. It was undertaken in conjunction with Moyne Shire Council and outlined strategic objectives and a number of recommended projects to progress.

The vast majority of these projects have either been completed or require a review to determine whether they remain a high priority into the future.

The Strategy developed in 2010 required a 5-year review be undertaken to ensure that work streams respond to the current structural changes, challenges and opportunities in our local economy. This Strategy is the culmination of the 2015 review.





Recent achievements of our Warrnambool community

Warrnambool is one of Victoria's progressive, growing regional cities. Over the past decade, the Warrnambool community has achieved many milestones that have contributed to our City's vibrancy, economic growth and diversification. Examples of economic growth and development in our City over the past decade include:

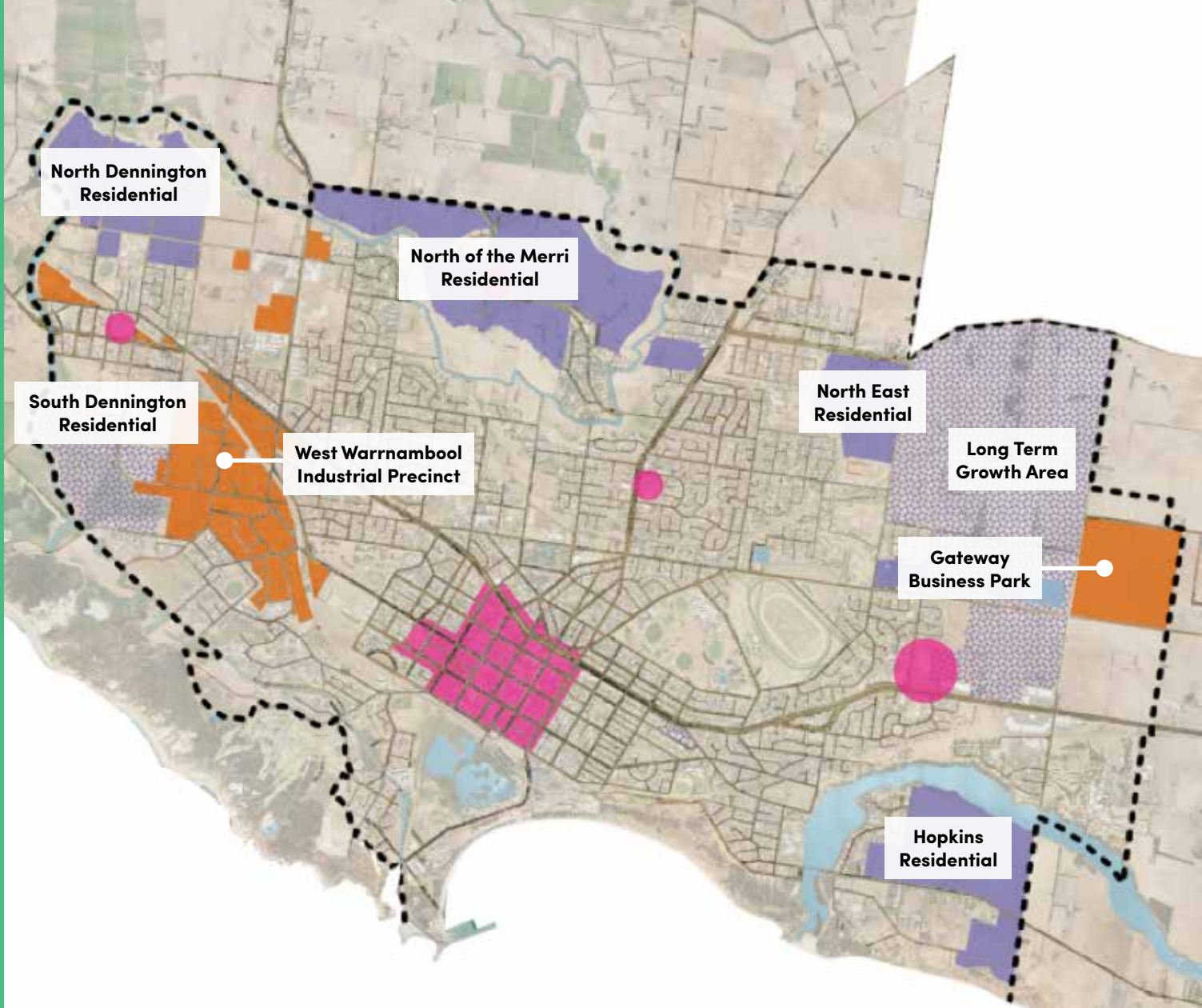
Population Growth

- An additional 3,200 persons have chosen to call Warrnambool home, representing an average annual growth rate of 1.1%.
- Over the past decade the vast majority of population growth in the Great South Coast region has been concentrated in Warrnambool.

Land Supply

- Our City has seen unprecedented levels of land rezoned for residential and industrial purposes.
- In 2004, Warrnambool had as little as three years' residential and industrial land supply. Today there is adequate zoned residential and industrial land to accommodate our City's growth well beyond 2030.
- There is an estimated 25+ years' zoned residential land supply across five greenfield residential growth areas – North Dennington, South Dennington, North of the Merri, North East, and Hopkins.
- Our City's second general industry hub is now open for business. Gateway Business Park fronting Horne Rd is a 65-hectare industrial zoned business park.

Over the past decade, the Warrnambool community has achieved many milestones.



An estimated 25+ years zoned residential land supply across five growth areas and a second general industry (Gateway Business Park) now open for business.



North East Warrnambool: One of five residential growth areas rezoned for development

Commencement of the \$30 million Warrnambool Integrated Cancer Care Centre.

Building Approvals

- The progress made towards increasing land supply in our City has translated to relatively consistent levels of building activity.
- Over the past decade the value of building works (residential and commercial) approved for construction in Warrnambool has exceeded \$1 billion.
- An average of 230 new residential dwellings have been constructed each year since 2005.

Healthcare and Emergency Services Infrastructure

- The completion of the \$100 million redevelopment of the Warrnambool Hospital – one of the largest projects in the history of our City.
- Commencement of the \$30 million Warrnambool Integrated Cancer Care Centre (including the community fundraising of \$5 million).
- Completion of Stage 1 Waterfront Apartments, Lyndoch Living.
- Major expansion of St John of God Hospital.
- Mercy Place Aged Care Stage 1 and Stage 2 development.
- Completion of new Warrnambool Ambulance Station.
- Commencement of new CFA Fire Station under way.
- Completion of independent living units for young people at Foyer Warrnambool.
- New HEMS rescue helicopter and facility established at Warrnambool Regional Airport.

Concept design – Warrnambool Integrated Cancer Care Centre



Stage 1 Warrnambool Hospital Development



Lyndoch Living Waterfront Apartments





Deakin University Campus Student Accommodation

Education and Early Years Infrastructure

- Development of Deakin University Warrnambool Campus student accommodation.
- Development of Deakin University Warrnambool Medical School.
- Construction of new St John's Primary School, Dennington.
- Major expansion of Emmanuel Secondary College.
- Expansion to many of Warrnambool's Primary and Secondary Schools via the Federal Government Building Education Revolution Program.
- Commencement of three new private sector early years facilities.
- Funding secured for major upgrade to the Special Education School.
- New \$12.5 million building at South West TAFE.



Infrastructure and Major Projects

- Construction of \$12 million of new roads connecting residential and industrial growth areas of Warrnambool: Horne Rd, Coghlan Rd, Aberline Rd.
- Completion of the new \$5 million Regional Aviation Park and runway upgrade at the Warrnambool Regional Airport.
- \$18 million upgrade to Warrnambool Telstra Exchange.
- Commencement of NBN construction brought forward from 2020 to 2016.
- \$1.6 million upgrade to the Warrnambool Intermodal Terminal.
- Major works on flood mitigation in North Warrnambool.
- Completion of the new regional State Government Primary Industries headquarters in our region.
- Commencement of the duplication of the Princes Highway Warrnambool to Winchelsea.
- Completion of Warrnambool – Port Fairy Rail Trail.
- Funding secured for the Winchelsea to Colac duplication of the Princes Highway.
- \$15 million for the construction of 6 new passing lanes constructed on the Princes Highway between Colac and the South Australian border.
- Completion of the \$10 million rail siding at Weerite to enhance rail passenger and freight movements.
- Completion of \$3.6 million Brine Receiving facility in Warrnambool to treat industrial brine waste.



Warrnambool Regional Airport – \$5 million Aviation Park Development



Warrnambool Intermodal Terminal Development

**Commencement
of the new
\$5 million Regional
Aviation Park.**

Business Development and Support

- Midfield Group's recent planning approval for a \$70 million investment to build a new cold store and dairy plant in Warrnambool – the largest single private sector investment in the history of our City.
- Proposed 1A Liebig St development, a \$20 million high density (apartments) residential complex in our City Centre.
- Major new development or expansion of retail and commercial office complexes including 4 new supermarkets.
- Major development or expansion of a variety of private and community sector entities in Warrnambool including Western District Employment Access, Westvic Staffing Solutions, Maddens Lawyers, Sinclair Wilson, Brophy Family and Youth Services, Wannon Water, and various property, real estate and construction related businesses.
- Major redevelopment across most car dealerships.
- Return of Sharp Airlines Regular Passenger Air services between Warrnambool and Melbourne.
- Delivery of the successful Great South Coast Skilled Migration Program.
- New Warrnambool Bus Lines route and depot development.
- Strengthening of economic relationship with our Sister City in China, the City of Changchun.
- A secondee from Changchun Municipal Government living and working in Warrnambool for 8 months during 2015 to facilitate trade, investment, education and tourism opportunities between our two cities.
- Delivery of the Building Better Regional Cities Housing Affordability Program in North Dennington – Winner of 2014 National Economic Development Australia (EDA) Award for Community Economic Development.

Delivery of the Building Better Regional Cities Housing Affordability Program in North Dennington.



Concept design – 1A Liebig Street residential development





Visitor Economy and Regional City Liveability

- \$9 million redevelopment of Warrnambool Lighthouse Theatre.
- \$3 million development of Warrnambool Foreshore Pavilion.
- Growth in the number and quality of restaurants and cafes in central Warrnambool.
- Renewal of Flagstaff Hill Maritime Village under way.
- Major events such as May Racing Carnival, Speedway, Fun4Kids, as well as numerous state and regional sporting carnivals and championships and various industry conferences and expos.

Economic Context

Warrnambool is the eighth-largest economy outside metropolitan Melbourne with a Headline Gross Regional Product (GRP) of \$1.4 billion in 2013.

The rate of GRP growth over the 10-year period 2003–2013 was 1.9% per annum, the fourth-highest GRP growth rate of all regional cities in Victoria (behind Bendigo, Ballarat and Geelong).

Warrnambool continues to attract new residents to our City, averaging a rise of around 330 persons each year to our population. As at June 2014, Warrnambool's population was estimated to be 33,500 persons.

Warrnambool has a diverse industry base with employment access to a range of services sector and manufacturing sector industries.

The key industry sectors by employment are:

- Health and Social Services
- Retail
- Education
- Manufacturing
- Tourism.

Warrnambool's economy is influenced by the Great South Coast region, which provides a market catchment of 120,000 residents around our City.

In recent years, Warrnambool's unemployment rate has been in the range of 5.1% – 6.5%.



The City of Warrnambool's unemployment rate has generally been at the lower range compared to other regional cities in Victoria and broadly comparable with the State Average.

The wider region's level of youth unemployment is high relative to metropolitan Melbourne and other regions across the State.

Findings from the Annual Warrnambool Business Confidence Survey show a discernible softening in perceptions of business confidence in our City over the past five years.

The population is growing, but ageing – requiring new jobs to be generated, new residential dwellings and new types of infrastructure services and facilities to accommodate demographic changes in our community.

This Strategy identifies a range of new and ongoing initiatives considered most necessary to not only build on the significant economic momentum of the past, but also to endeavour to address some areas of our economy that have underperformed in recent years.



Local Insight with Policy context

This Strategy has been informed by listening to a range of our local business leaders, tapping into their local insight, knowledge and understanding of our region's strengths and weaknesses.

Data has been obtained from the Australian Bureau of Statistics, Regional Development Victoria and various other sources referenced throughout this document.

Local insights have been an important part of the development of this Strategy to validate the data collected concerning the economic performance of Warrnambool.

This Strategy draws upon policy and strategic guidance from a wide range of documents at levels of Federal and State Government, Regional Cities Victoria, Barwon South West, Great South Coast region and Warrnambool City Council.

Key Council and regional strategies considered in formulating the development of the priorities in this Strategy include:

- Council Plan
- City Centre Structure Plan
- Warrnambool Planning Scheme
- Destination Warrnambool Plan
- Events Strategy
- Health and Wellbeing Plan
- Land Use Strategy
- Recreation and Culture Plan
- GSC Regional Strategic Plan
- GSC Food and Fibre Action Plan
- GSC Regional Transport Plan.

Economic Development and the role of Warrnambool City Council

This section presents an overview of Warrnambool City Council's role in economic development. This information should be used to better understand Council's capacity to influence economic objectives, acknowledging that it has jurisdictional and funding limitations. These limitations must be understood when moving from the strategy vision and priority areas to the implementation plan.

Promoting the economic viability and sustainability of the local community is a primary objective of local government under the Local Government Act. Council has a valid and important part to play in promoting and facilitating local economic development. Council is, in many cases, the first point of contact for local businesses and the community in relation to day-to-day concerns of our local businesses.

As well as stimulating the economy through being one of the City's largest employers, Council delivers a major capital expenditure program where, through procurement strategies, a high proportion of local spend supports local businesses.

Local Government does not 'drive' economic development. This is the role of business and industry. Local Economic Development is one that is business and industry led and government supported.

Council must work with government and industry stakeholders to maximise resources to assist in delivering better economic outcomes for our City.

Council will support, facilitate, advocate, and undertake a range of economic development initiatives, but will not necessarily always be the party responsible for delivering a particular outcome; this will be delivered in partnership with a range of other stakeholders.

This Strategy is designed to represent a commitment by business, industry, and all tiers of government who are united in their desire to see the City of Warrnambool realise its full economic potential.

Where Council can continue to play an effective role in economic development are in the key areas of:

- Facilitating Investment
- Through the Planning Scheme, supporting appropriate development that is attractive to new investors and supports local businesses
- Efficient and effective infrastructure
- Business Support
- Supportive governance structures
- Providing strategic leadership on economic development issues to promote our City's reputation and improve business confidence
- Fostering links between research and learning institutions and business to encourage industry innovation
- Connecting local businesses to the region, state, nation and globe.

Our Vision for 2020

Our vision is that by 2020, the City of Warrnambool will be acknowledged across our nation as a progressive and vibrant regional city.

The coastal regional city of Warrnambool will continue to serve as the dominant settlement and service centre for the Great South Coast region.

By 2020, Warrnambool businesses will feel engaged, supported, and encouraged to grow. New businesses and industries are attracted to Warrnambool because of its strategic location, skilled and growing workforce and high quality infrastructure.

Public and private investment has continued around the City, with clear and consistent Council strategies, policies and plans in place to give a level of certainty for investors and developers.

Warrnambool will continue growing its population and attracting new and improved services to the Great South Coast region. Warrnambool's growth will offer economic and social spill-over benefits for the wider region, including the attraction of new or higher order services and facilities.

The \$30 million Integrated Cancer Care Centre development will be completed and servicing a large catchment across South West Victoria. Funding for the \$100 million Stage 2 Warrnambool Hospital development will be secured with construction under way.

Our City Centre will have benefited from significant private and public investment, generating renewed interest and increased activity as the premier regional centre of the Great South Coast.

Warrnambool City Council will have continued to play a strong and proactive facilitation role in suitable investment proposals within our key economic precincts, including but not limited to, our City's second general industry hub Gateway Business Park, and the new Aviation Park at Warrnambool Regional Airport.

At long last, additional rail services to and from Melbourne will be operating. The Princes Highway duplication from Waurn Ponds to Colac will be complete, together with additional passing lanes west of Colac through to Warrnambool.

We envisage that both Deakin University Warrnambool Campus and South West TAFE will have increased student numbers off the back of industry relevant course offerings – further consolidating the presence and profile of higher and further education in our City.

A growing concentration of international students will reside in Warrnambool whilst studying at our City's University or South West TAFE.

Deakin University's Medical School will continue to go from strength to strength, with some graduates choosing to call Warrnambool home.

New Residential Growth Areas will continue to expand and form active new communities, driven by steady population growth and the availability of jobs.

High speed broadband will be readily available across our City driving innovation and challenging traditional models of doing business.





Warrnambool will increasingly be known as a Centre of Excellence in food processing benefiting from our surrounding agricultural sector that plays such a vital economic role in our broader region.

Our largest private sector employer Midfield Group will continue to be headquartered in Warrnambool and will employ many thousands of residents (directly and indirectly) in our City.

Warrnambool's labour force will have continued to grow and will have addressed areas of skills shortages becoming a drawcard for attracting new and existing industry growth to the area.

Significant investment in tourism infrastructure and promotion of our City as a destination will trigger material growth in our visitation numbers. Existing and new major events will keep our City vibrant throughout the year.

Warrnambool will have a long awaited new library deserving of our progressive regional city and the large regional catchment it serves.

Our City's education attainment rates will be on the rise, and youth unemployment rates on the decline, courtesy of intensive engagement and integration across all levels of our Education sector, business community, and other stakeholders.

Warrnambool will continue to offer residents the strength of a dynamic regional city while still maintaining relative affordability in housing, accessible childcare, and a high standard, safe living environment compared to Australia's metropolitan cities.

By 2020 Warrnambool's economy will be further diversified and thriving, evidenced by continued growth in Gross Regional Product, labour force numbers, relative low unemployment rates, and higher than present workforce participation levels compared to other Victorian regional cities.

Our vision is ambitious but achievable.

**By 2020,
Warrnambool
businesses will
feel engaged,
supported, and
encouraged
to grow.**

Warrnambool Strategy – Priorities

Our vision is that by 2020, the City of Warrnambool will be acknowledged across our nation as a progressive and vibrant regional city.

Our vision for Warrnambool will be achieved by leading, advocating, supporting and working with a wide range of partners to implement or influence priorities categorised under five key areas:

- 1. Economic Leadership and Collaboration**
- 2. Infrastructure and Transport**
- 3. Investment Attraction and Business Support**
- 4. Skills and Employment**
- 5. Visitor Economy and Regional City Liveability.**

These priorities will be expanded upon later in the Strategy.





1. Economic Leadership and Collaboration

- Convene an Economic Development Advisory Group which draws together representatives from Council, business and industry, government and other stakeholders.
- Identify and mentor potential business and community leaders to promote our City's competitive strengths, values and attributes.
- Strengthen the profile and awareness of Council's investment facilitation and business services offering, the celebration of achievements made by local businesses and general showcasing of the City's competitive strengths.
- Foster strong relationships with relevant State and Federal Government Departments to ensure co-ordination and support for economic development initiatives at the local level in Warrnambool.
- Support and participate in economic development initiatives driven by Regional Cities Victoria and the Great South Coast Economic Growth Pillar Group.
- Support active collaborative alliances between Council and business membership organisations that have the expressed objective of supporting economic development and training programs in our City and wider region.
- Create a regional network of existing international expertise and relationships to help forge stronger business and industry linkages outside the region.
- Ensure the priorities contained in this Strategy are aligned with the principles of the Warrnambool Planning Scheme to encourage appropriate development.

**Supporting
economic
development
and training
programs in our
City and wider
region.**



2. Infrastructure and Transport

- Advocate for the development of the \$100 million Stage 2 Warrnambool Hospital.
- Form a working group of business and industry 'champions' of digital technology to promote the capabilities and benefits of high speed broadband.
- Work with telecommunication providers to ensure the delivery of high speed broadband infrastructure and services across the City, with a specific focus on project locations where productivity and innovation will be maximised.
- Support the renewal activities of the Warrnambool City Centre.
- Lead and advocate for increased passenger rail services and modernised rolling stock between Melbourne and Warrnambool.
- Continue to support and advocate for the priorities of the Warrnambool – Melbourne Rail Freight service and the associated Warrnambool Intermodal Terminal.
- In partnership with stakeholders and the Victorian Government, investigate the need for a Warrnambool Freight Study.
- Investigate the development of car parking on the Vic Track-owned land at the Warrnambool Railway Station.
- Advocate to the Victorian Government seeking the upgrade of the Warrnambool Railway Station.
- Support the development of Warrnambool Regional Airport including the construction of a lengthened and strengthened main runway.
- Promote, and where possible, support the return of the flight Passenger service between Warrnambool – Melbourne.
- Advocacy for further upgrades to the Princes Highway west of Colac to Warrnambool.
- Support the Wannon Water Authority's ongoing investment in water-security infrastructure.
- Target investment attraction to business and industry requiring high quality water resources.
- Investigate the feasibility of new and emerging waste to energy treatment plants and processes.
- Support research and development in clean energy sources, particularly solar, wind and gas.
- Partner in the development of a new library and learning centre.

Advocate for the development of the \$100 million Stage 2 Warrnambool Hospital.



3. Investment Attraction and Business Support

- Identify the needs of our City's key economic precincts and facilitate appropriate investment within these precincts.
- Work with property agencies to identify investment-ready sites.
- Develop an investment prospectus promoting the City's attributes and opportunities to attract new businesses and industries to Warrnambool.
- Work with partners to research industry sector business cases to grow high value industries in our City such as:
 - Food and agriculture
 - Tourism
 - International education
 - Health and wellbeing
 - Water and waste services.
- Prepare an industry sector development prospectus for high value industries that offer the greatest potential to succeed.
- Development and promotion of Warrnambool as a regional centre of excellence for food production.
- Collaborate with the Victorian Government towards supporting our region's Food and Fibre agenda and attract resources to increase regional exports.
- Support the implementation plans of the Great South Coast Food and Fibre Plan and the Western Victorian Dairy Strategy.
- Continue to strengthen economic relationships with our Sister City of Changchun in China (and other global markets) to create new markets for our region's products, and leverage potential tourism, education and other opportunities

Identify the needs of our City's key economic precincts.



- Advocate for and support businesses seeking international export licenses to grow the volume and range of our local products to the world, and in particular Asia.
- Develop case studies to demonstrate and promote the opportunities for our region from the activation of the Free Trade Agreements with China, Japan and Korea.
- Investigate the development of a Micro Business hub model in Warrnambool focused on providing offices for start-up businesses and other business support services.
- Continue the successful Warrnambool Business Visitation Program.
- Facilitate mentoring and high quality training workshops that meet the needs of small business owners, home businesses, and start-ups.
- Host both formal and informal networking events targeting a range of business sizes and diverse sector backgrounds.
- Deliver the annual Warrnambool Business Festival.
- Develop and analyse up-to-date economic and demographic data for investors and businesses in our City, including the annual Warrnambool Business Survey.
- Working with partners, prepare a Residential Aged Care Sector Plan designed to better understand the dynamics and fundamentals of this growth industry and to explore approaches to accelerate its growth in Warrnambool.
- Develop and advocate for alternative funding models to finance more economic development initiatives in our City.

4. Skills and Employment

- In partnership with Deakin University's Warrnambool Campus, support the implementation of the Deakin Warrnambool 2020 Strategic Plan.
- Advocate and support for the promotion of Warrnambool as a "University City" through shared initiatives with Deakin University Warrnambool Campus.
- Continue to support the development of Deakin University's Warrnambool Medical School.
- Advocate to the Victorian Government seeking the appropriate resourcing of Warrnambool-based South West TAFE to ensure the provision of a responsive vocational training sector and apprentice support programs designed to serve the needs of local employers.
- Facilitate and support education providers with school-to-work and higher education to work links with industry and businesses.
- Leverage and support opportunities for Warrnambool's Deakin University, South West TAFE and secondary schools to increase the intake of international students.
- Support and contribute towards actions of the Great South Coast Beyond the Bell Project to improve Education attainment levels.
- Partner in a "Warrnambool Careers Expo" designed to bring together educators, employers, students and unemployed persons in a collaborative environment.
- Work with industry partners to identify major skills shortages in our City's workforce and provide timely updates to industry and government.
- Advocate support from the Victorian and Australian Governments for the reintroduction of support for Warrnambool and region to reinstate its successful Skilled Migration Program.
- Work with partners to get our local providers NDIS ready and maximise the local economic and skills benefits from this significant change to the service model.
- Advocate to the State and Federal Governments for the relocation of further public sector jobs to the regions, including Warrnambool.

Work with industry partners to identify major skills shortages in our City's workforce.



5. Visitor Economy and Regional City Liveability

- Support the promotion and implementation of priorities of the Great Ocean Road Tourism Board Master Plan and Destination Action Plan for the Warrnambool Tourism area to include:
 - Develop and consistently promote a unique market positioning and brand for Warrnambool
 - Develop product and experiences to match visitor demand and improve seasonal dispersal
 - Implement the Flagstaff Hill Master Plan to revitalise the visitor experience
 - Develop a visitor service excellence culture and capacity program
 - Determine and promote the value of the visitor economy to the community.
- Investigate the need for and feasibility of a regional scale conference facility in Warrnambool.
- Work with partners to investigate the attraction of new major events worthy of further development –including sporting, cultural, food and agricultural events and conferences.
- Support the development of inner-city living to add vibrancy and activity to our Warrnambool City Centre.
- Ongoing support for the development and maintenance of recreational, arts and cultural facilities, essential for supporting and promoting the liveability and attractiveness of our City.
- Support the growth of creative industries and awareness of their economic value across our business community.
- Support the assessment of new tourism proposals, including appropriate and sustainable development on Crown Land proposals.



Warrnambool

Economic Overview

- One of the 50 largest Australian cities by population.
- Our City is located 260 kilometres south-west of Melbourne and linked direct by the Princes Highway.
- Freight and passenger services for both rail and air operate direct to and from Melbourne.
- Warrnambool is the largest city in the Great South Coast region with a current resident population of 33,500 persons but serves a wider regional catchment of 120,000.
- A track record of sustained and steady population growth, increasing by over 3,200 persons over the past decade, and growing by about 1.1% per annum.
- A high amenity coastal location with access to higher order educational, health and business services.
- The key industry sectors in terms of present employment are:
 - Healthcare and social services
 - Food processing
 - Retail trade
 - Education and training
 - Tourism
 - Construction.
- An 18,000+ labour force.
- Around a third of our City's employment base is public sector – schools, hospitals and government.
- Estimated 25+ years of zoned residential and industrial land.
- A diverse economy with major employers including Midfield Group, Southwest Healthcare, Fonterra, Deakin University, South West TAFE, Warrnambool City Council, Sinclair Wilson, Wheelie Waste, Chitticks Bakery, Owen Truss, Westvic Container Export, Ryans Transport, WDEA Enterprises, Westvic, CriTech Plumbing, Matthew's Petroleum Services, PFD, major retailers and supermarket chains, car dealerships, banking institutions, Wannon Water Authority, and various State Government departments, agencies and schools.

**A track
record of
sustained
and steady
population
growth.**



This section provides a summary of the key economic fundamentals of the Warrnambool economy. It is not intended to be exhaustive but to provide a snapshot of how our local economy is performing, the drivers of our economy, and where areas of future economic growth might occur.



Warrnambool: Population 2004–2014



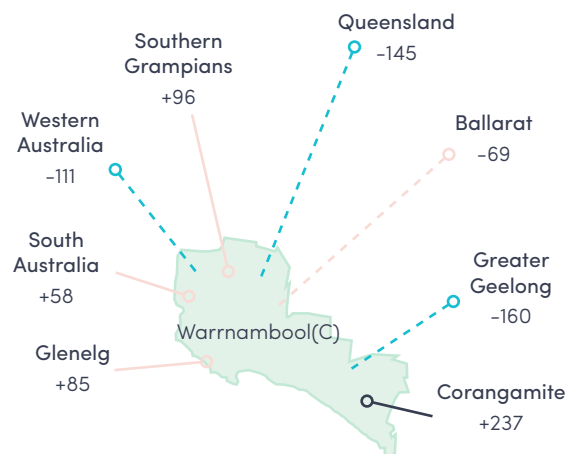
Source: ABS Cat.3218.0

In many instances, population growth follows jobs growth. Growth or decline in a population has a direct impact on levels of total private and public expenditure in our local economy. Population growth provides the underlying basis for growth in labour resources, improvements in skills levels and development of investment and jobs within our area.

The estimated resident population of the City of Warrnambool was 33,500 people in 2014. The population grew on average by 1.1% per annum in the period 2004–14, which made it the fifth-fastest growing regional city in Victoria. In terms of absolute numbers, this represented an approximate net increase of over 3,200 residents.



Warrnambool: Net Migration 2006-2011



Net migration 2006-2011

50 to 99

100 to 200

200+

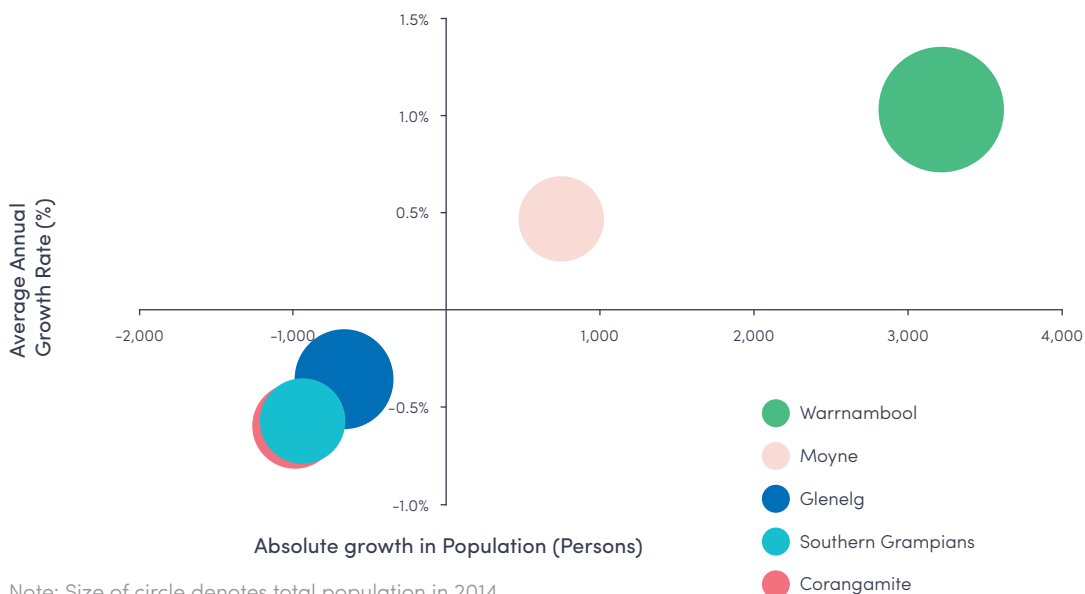
Dotted line denotes outflow
Overseas migration not shown

Warrnambool's net migration gain during the period 2006-11 was mainly driven by gains from nearby municipalities, particularly Corangamite, Southern Grampians and Glenelg.

Over one-quarter of the city's new residents were from Melbourne (net migration was +13), possibly attracted by the city's coastal amenity and range of services. About 280 overseas immigrants have settled in Warrnambool over this period.

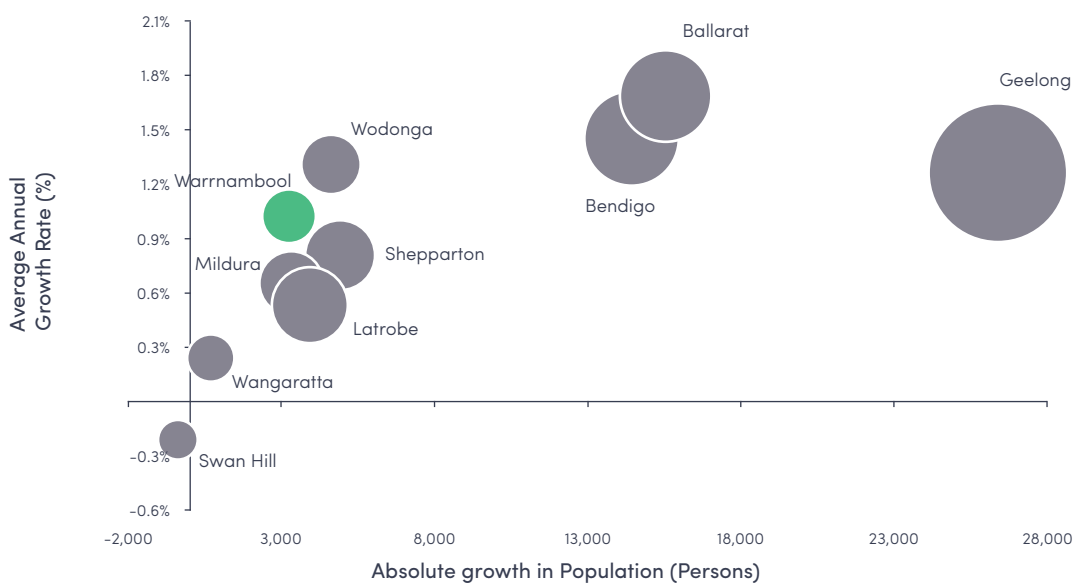
The city's largest net losses were to Greater Geelong, Queensland and Western Australia.

Great South Coast: Population 2004–2014



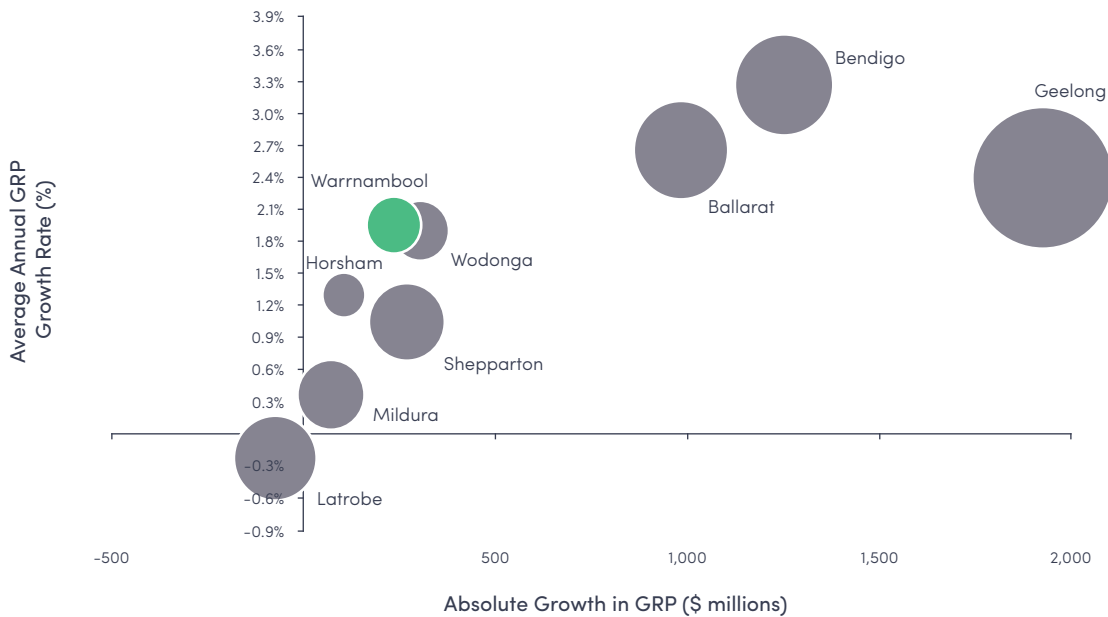
The concentration of population growth across the Great South Coast region has occurred in Warrnambool with some moderate growth in neighbouring Moyne Shire. The historical growth of Warrnambool has balanced out population decline across the other municipalities in the Great South Coast region.

Regional Cities Victoria: Population 2004–2014



There are 10 regional cities in Victoria. Warrnambool is the eighth largest regional city by population and the fifth fastest growing over the past decade, behind Ballarat, Bendigo, Geelong and Wodonga.

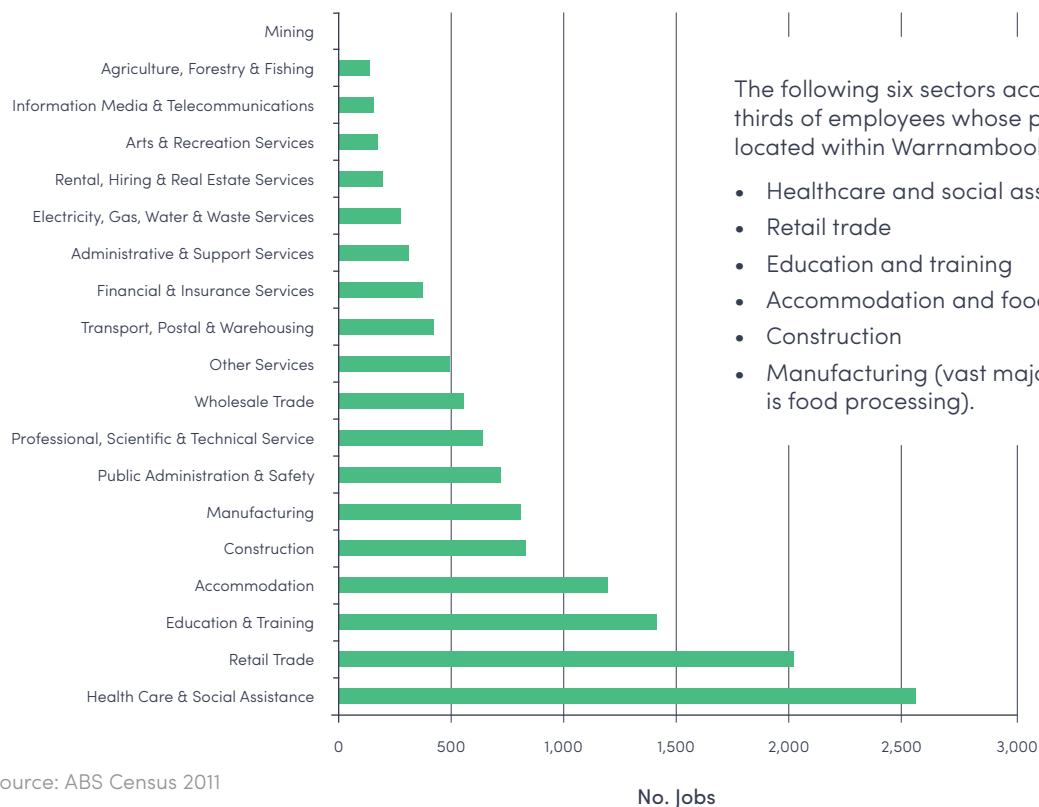
Warrnambool: Growth in Headline Gross Regional Product (GRP) 2003–2013



Note: Size of circle denotes total Gross Regional Product in 2013
Source: Regional Development Victoria

Warrnambool is the eighth-largest economy outside metropolitan Melbourne with a Headline Gross Regional Product (GRP) of \$1.4 billion in 2013. GRP grew by \$241 million in the period 2003–13. The rate of growth was 1.9% per annum, the fourth-highest growth rate of all regional cities in Victoria.

Warrnambool Employment by Industry



The following six sectors account for over two thirds of employees whose place of work is located within Warrnambool:

- Healthcare and social assistance
- Retail trade
- Education and training
- Accommodation and food services
- Construction
- Manufacturing (vast majority of which is food processing).

Source: ABS Census 2011

Warrnambool: Change in industry sector of employment, 2006–2011



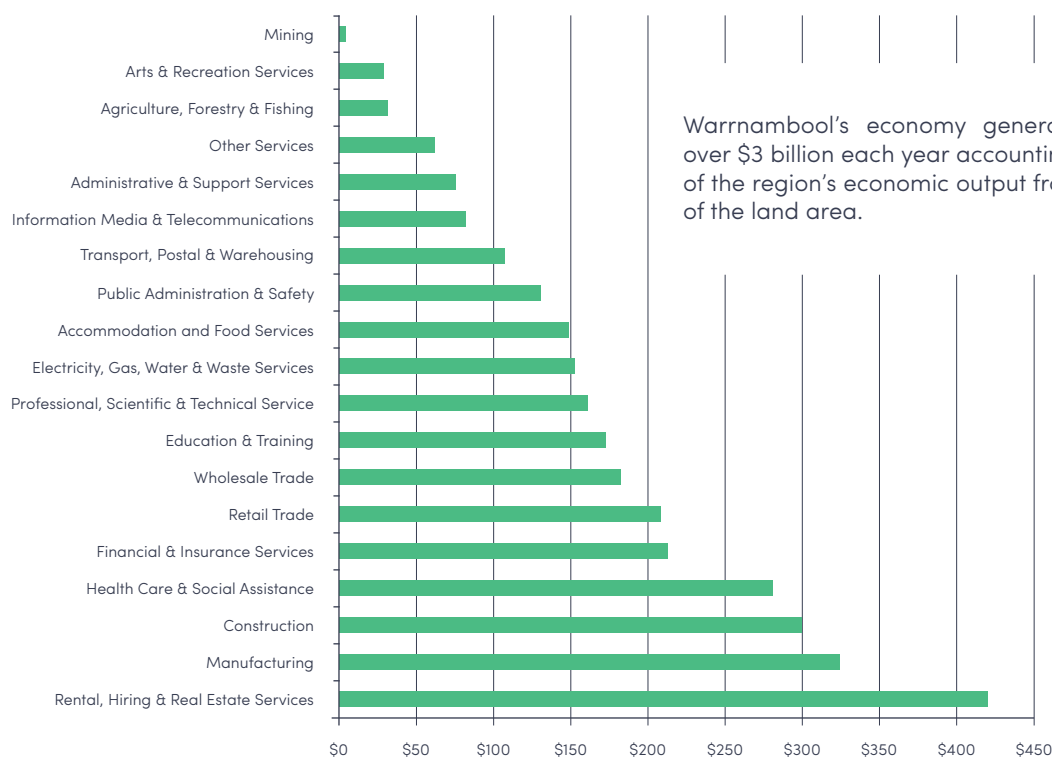
Over the period 2006–2011 the largest change in the jobs held by the resident population has been the growth of the health care and social assistance industry, adding almost 400 jobs to our local economy.

This scale of growth is commensurate with the regional services role that our City plays for the wider region and also significant investment in healthcare infrastructure sector over this period. Material employment growth over this period also occurred in Accommodation and Food services, Education, Construction, Arts and Recreation Services, Professional Services and Public Administration.

The only sector that contracted over this period was the retail sector which reported a small decline in employment.

Source: ABS Census 2006 and 2011

Warrnambool Employment by Industry

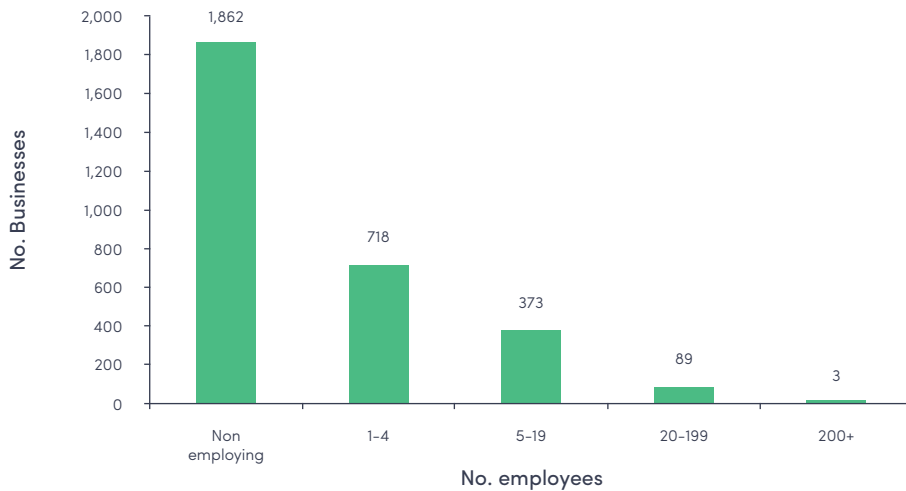


Warrnambool's economy generates output of over \$3 billion each year accounting for over 20% of the region's economic output from less than 1% of the land area.

Source: Remplan

\$ millions

Warrnambool: Business Counts, June 2014



Source: ABS Cat. 8165.0 Note: This count only includes businesses which actively traded ingoods or services during the reference period

There are over 3,000 businesses in the City and 1,862 (or 61%) of these are non-employing/self employing operators. A further 1,091 (or 36%) are small businesses which employ up to 19 employees. Eighty-nine businesses (or 3%) employ between 20-199 staff. Three businesses in our City employ greater than 200 employees. This structure means economic development policies incorporate strategies that support existing SMEs to grow. It has been demonstrated that a high percentage of growth in an economy often comes from existing businesses.

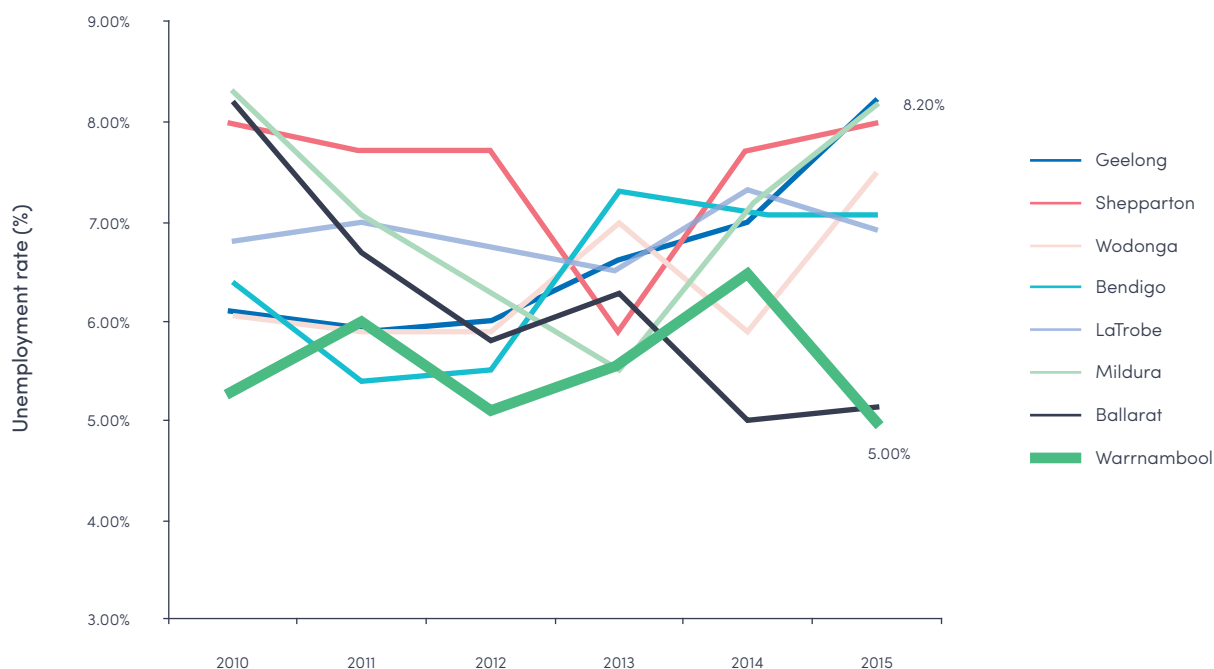
Warrnambool: Unemployment 1998-2015



Source: Small Area Labour Markets, DEEWR

Since 1998, Warrnambool's unemployment has reached a high of 9.8% in 1998 and as low as 4.1% in 2008. In recent years, Warrnambool's unemployment rate has been in the range of 5.0% - 6.5%.

Regional cities: Unemployment rate 2010–2015



Source: Small Area Labour Markets, DEEWR

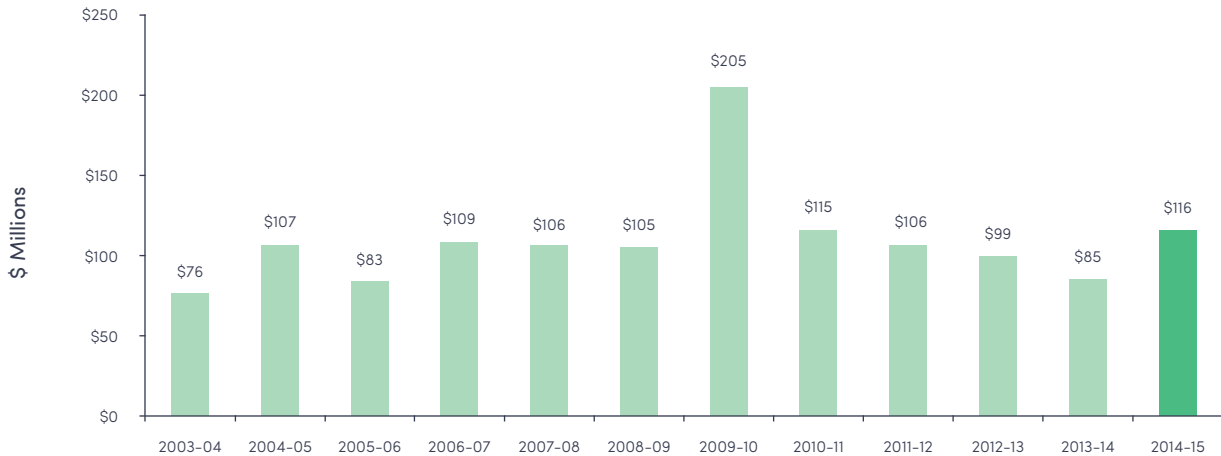
Over the five-year period 2010 – 2015, the City of Warrnambool's unemployment rate has been at the lower range compared to other regional cities in Victoria. As at June 2015, Warrnambool reported the lowest unemployment rate of all regional cities in Victoria.

Region	2010	2011	2012	2013	2014	2015
Warrnambool	5.3%	6.0%	5.1%	5.6%	6.5%	5.0%
Victoria	5.3%	5.0%	5.5%	5.9%	6.6%	5.9%
Australia	5.2%	5.1%	5.2%	5.7%	6.1%	5.9%

Source: Small Area Labour Markets, DEEWR

As at June quarter 2015, Warrnambool's unemployment rate (5.0%) was below both the State rate (5.0%) and above the National rate (6.1%).

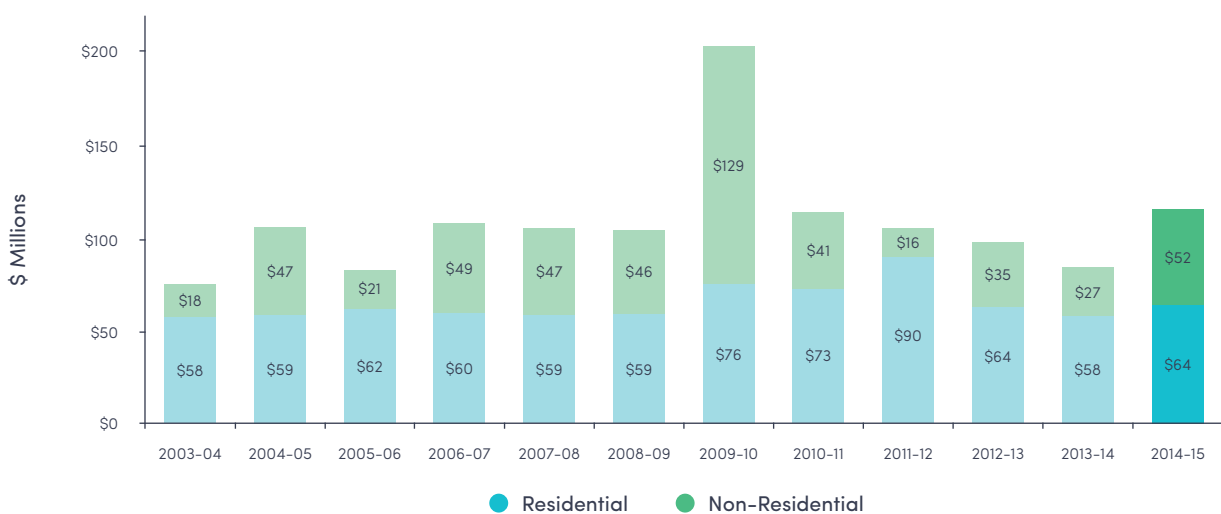
Warrnambool: Value of Building Approvals 2003/04 – 2014/15



Source: ABS Cat. 8731.0

The value of total building approvals for new residential and non-residential buildings is a leading indicator for building activity. Over the past decade, Warrnambool has averaged over \$100 million in new building activity each year. Since the record value of building approvals reported in 2009/10 (attributed to the \$100 million+ Warrnambool Hospital Stage 1 development), Warrnambool's building activity has been softening in recent years but strengthened in 2014/15 (\$116 million).

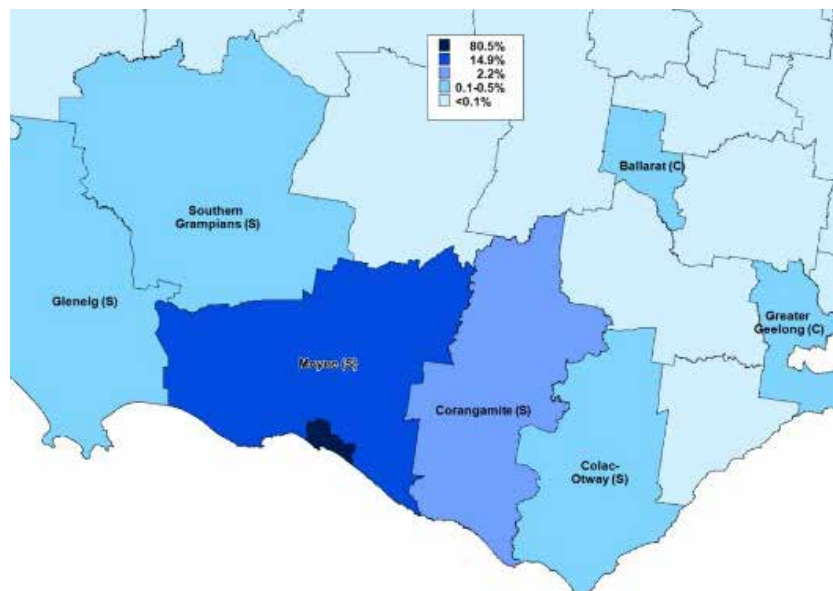
Warrnambool: Value of Building Approvals - Residential versus Non-Residential 2003/04 – 2015/15



Source: ABS Cat. 8731.0

Regional labour hub

Warrnambool is an important regional employment hub. Around 2,500 of its workers reside in other regional Victorian LGAs, mainly in neighbouring Moyne and nearby Corangamite.



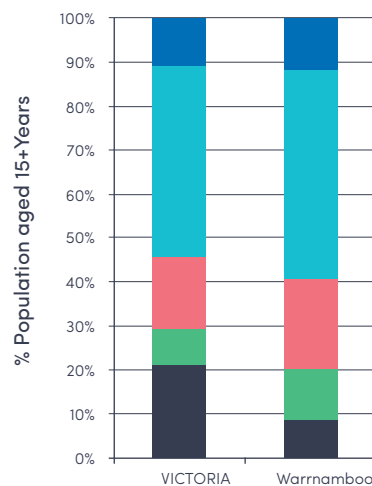
Warrnambool: Education attainment

A relatively lower proportion of Warrnambool residents hold degree or diploma qualifications compared to the State average.

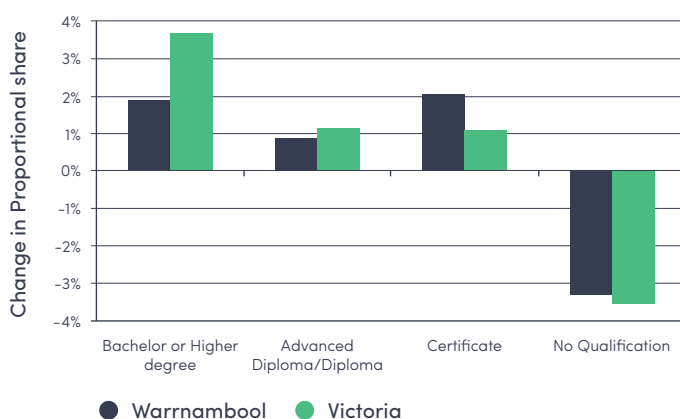
A relatively lower proportion of people in Warrnambool hold degree or diploma qualifications compared to the State average. This is reflected in the proportion of workforce in high skilled jobs (54.7%) which is below the state average (57.3%). However, a greater than average proportion hold vocational qualifications reflecting the area's strong service and food manufacturing base.

During the period 2006–2011 the number of Warrnambool residents with qualifications increased, with above state average growth in Certificate qualifications (19.1% increase compared to 17.2% in Victoria). However, growth in university qualifications was below state averages. For the region to improve its value add potential, its vocational strengths need to be matched with further encouragement of higher education.

Highest Qualification Level 2011



Change in Share of Residents with Qualification 2006–2011

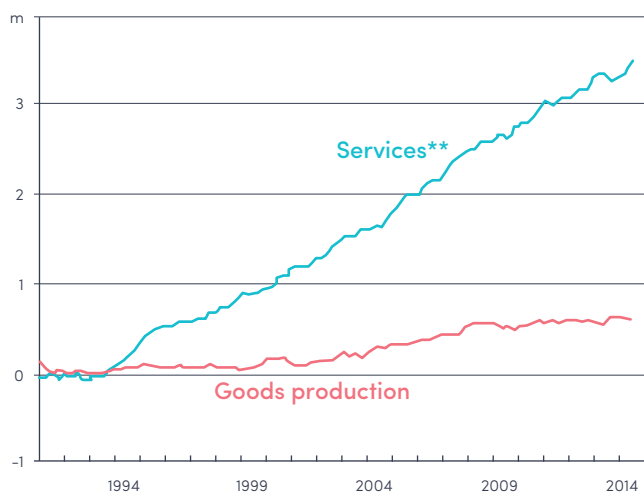


Source: Regional Development Victoria, NIER 2013

The importance of Education and the growth of the Services Industry

Employment by Industry*

Cumulative growth since August 1991



* Excludes agriculture, forestry & fishing

** Also includes public administration & safety and goods distribution

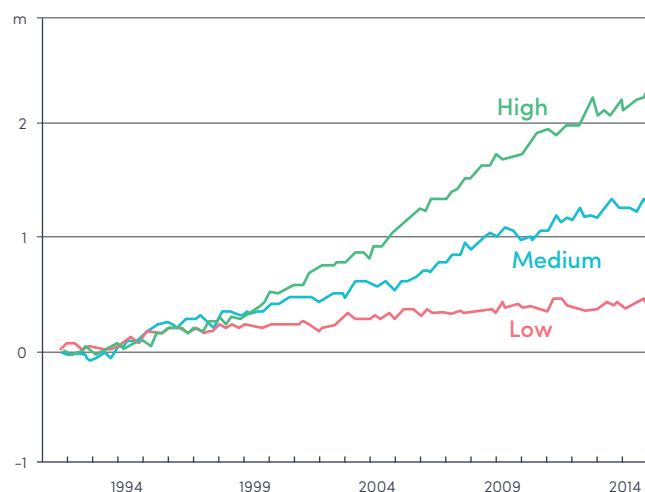
Source: ABS, RBA

The evidence is clear. Since the early 1990s, some 3.5 million of the 4 million jobs created in Australia have been service industry jobs such as health, education, personal services, retailing, finance, engineering, information technology, software design, telecommunications.

Over 3½ million jobs were obtained with a qualification of Certificate II to IV, Diploma or higher. Less than 500,000 jobs were created with employment qualifications of Certificate I or compulsory secondary school education.

Employment by Qualification Requirement*

Cumulative growth since August 1991



* Categories are based on occupations (as defined in ANZSCO) that require skill levels commensurate with certain levels of education, training or experience; 'high' indicated Diploma or higher or equivalent experience; 'medium' indicated Certificates II to IV (as defined by the Australian Qualifications Framework) or equivalent experience; 'low' indicates Certificate I or compulsory secondary school education.

Source: ABS, RBA

Warrnambool: Economic measures by top 4 industry sectors

EMPLOYMENT 18,000+ workers	OUTPUT (\$) \$3 billion	WAGES AND SALARIES (\$) \$840 million
1. Health Care	1. Manufacturing	1. Health Care
2. Retail	2. Rental, Property	2. Education
3. Education	3. Construction	3. Retail
4. Accommodation & Food	4. Health Care	4. Financial Services

EXPORTS (\$) \$720 million	VALUE ADDED (\$) \$1.5 billion	NUMBER OF BUSINESSES 3,000+ businesses
1. Manufacturing	1. Rental, Property	1. Construction
2. Health Care	2. Health Care	2. Agriculture
3. Utilities	3. Financial Services	3. Rental, Property
4. Accommodation & Food	4. Education	4. Retail

Source: Remplan, ABS

The above tables list Warrnambool's top four industry sectors by a number of measures:

- Employment
- Output
- Wages and salaries
- Exports
- Value added
- Number of businesses.

It is evident that Warrnambool's economy, for a resident population of 34,000 persons, is driven by a diverse range of activity and that different sectors contribute in different ways.

Planning for a Warrnambool Economy of the Future

Warrnambool: Population forecast 2011-2036

State Government Population Forecasts project our City's population to increase by 25% over the period 2011-2031, an increase of approximately 8,200 persons and circa 4,200 additional households.

Warrnambool	2011	2016	2021	2026	2031	Change	%
Total Population	32,667	34,060	35,847	38,264	40,895	▲ 8,228	▲ 25%
Households	13,332	14,091	15,076	16,286	17,541	▲ 4,209	▲ 31%

Source: VIF 2014

An estimated
4,000+
additional
jobs will need
to be created
in our City
over the next
20 years.

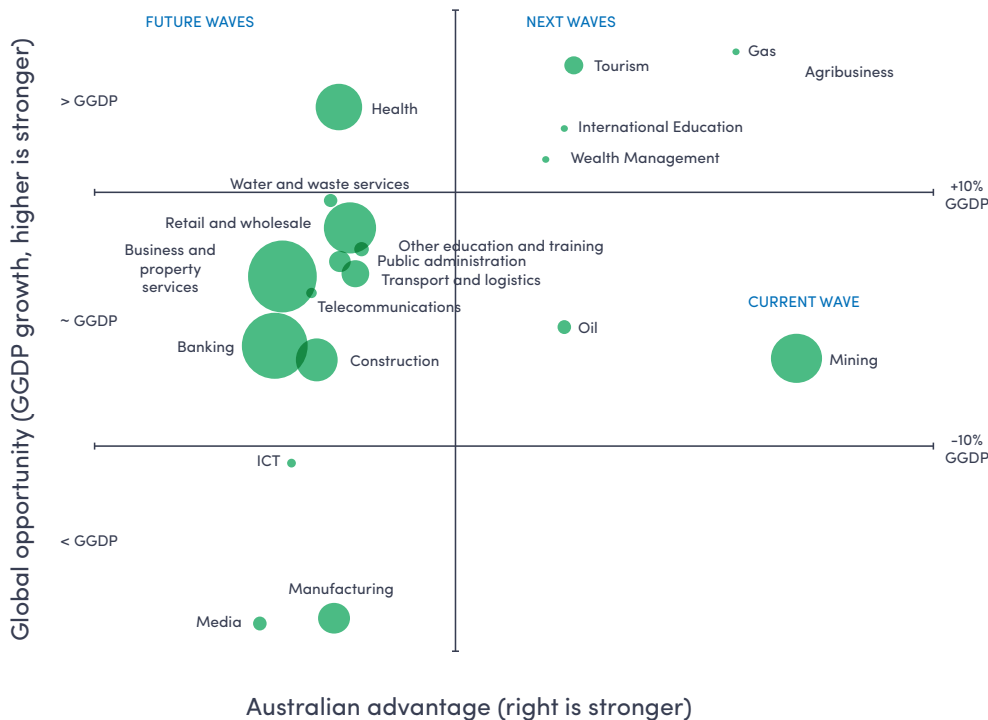
An estimated 4,000+ additional jobs will need to be created in our City over the next 20 years to sustain the projected rates of population growth. If the State Government forecasts for Warrnambool (which have been historically conservative) are exceeded, perhaps significantly greater than 4,000 jobs must be generated over the next twenty years.

What will be the key drivers of our City's future economic growth and where will the jobs come from?

An economy of the future must play to our strengths, and be guided by emerging global trends. Naturally, trends can change over time as new opportunities emerge, lines blur between sectors and the economic landscape transforms. The aim is to take a mid to long term view based on underlying trends and informed by the present, to ensure our City is as well positioned as possible for the future.

Whilst this Strategy is designed for a time horizon of five years (2015-2020), a number of priorities will be included in this Strategy to progress medium to longer term planning of how our City's economy will look in the future i.e. planning of how our City moves from protecting the jobs of today, to creating the jobs of the future.

Australia's estimated current, next and future areas of growth by sector 2013 – 2033



Recent research by Deloitte identified a number of long term high growth industry sectors:

- ✓ That are projected to grow significantly faster than global gross domestic product (GGDP) over the next 10 to 20 years; and
- ✓ Where Australia has a source of comparative advantage that is difficult for other nations to match.

Long term, high growth sectors identified include areas such as **agribusiness, health, tourism, international education, water and waste services, and gas.**

The aforementioned research is based on Australian industry sector projections. However, the findings are not lost on Warrnambool particularly as many of these high growth industry sectors already form an integral part of our City's economy and/or comprise sectors where our City and regional attributes are well aligned to leverage further growth.

Targeting the attraction and expansion of long term, high growth sectors has potential to contribute high value adding, knowledge-driven jobs to the City.

Additionally, growth in these high value sectors will stimulate other parts of the economy and encourage further jobs growth.

This list of strategic sectors is not exhaustive. Market conditions can change quickly and this Strategy will reconsider focusing efforts towards other identified opportunities.

A future economy is likely to be less reliant on local consumption and generate wealth through export, high value industries and new investment.

While challenges lie ahead, we should be encouraged our City and wider region has the potential 'growth engines' that will determine our prosperity for generations to come.

We will see growth if business and government take an aligned view of where the Warrnambool advantage can be best used to exploit the opportunities of the future.

Given the competitive advantages of Warrnambool, the challenge is how we position our City to harness the opportunity and successfully grow high value industries. This Strategy will include initiatives designed to advance our planning for an economy of the future.

Long term high growth sector

Where is the opportunity for Warrnambool?

Agribusiness – Global demand for fresh, clean produce. Switch to protein is on, particularly in fast growing Asian economies.

Opportunity lies in offering high value, high-margin products – *“not the supermarket to Asia but the delicatessen”*.

- Established business and supply chain in beef and dairy across the region.
- Expertise in emerging areas like aquaculture/fish farming.
- Availability of water resources compared to other regions in Victoria.
- Opportunities in livestock breeding and genetics, livestock export, smaller niche valued added products (wine, cheese, etc).
- Potential leverage off growing economic ties with the Warrnambool’s Sister City of Changchun in China.
- Specialisation potential in exports logistics, trade/finance solutions.
- Need to make agribusiness attractive again to graduates and enhance skills.
- Attracting the capital.

Health – An ageing population will generate a wide range of recession-proof domestic needs, in the health sector.

As the health services hub for the Great South Coast region, our City is well positioned to service high growth health sub-sectors.

- Aged care, retirement living and leisure – More residents are expected to require aged care and/or demand higher order retirement facilities and they will increasingly have the retirement funds to pay for it.
- Preventative health and wellness services – We expect to live longer but we also want to live better – physical activity and weight loss industries, vitamins and supplements, naturopathy, acupuncture, remedial massage, etc
- Traditional health providers – biotechnology, pharmaceutical, medical device companies, diagnostic services. Allied health professionals such as nursing, optometry, dentistry, pharmacy, psychology, occupational therapy will continue to be in demand.
- Community and personal care – time-saving services – dog walkers, personal shoppers, gardening services, etc.
- Financing the future – wealthy retirees looking for choice and increasing levels of advice for self-managed super funds. Often much of the wealth is tied up in family home or assets creating opportunities for new equity products, estate planning, etc.
- Digital delivery of health – innovative e-health/tele-health offerings translates to cost effective and convenient delivery for regional and rural areas.
- Health sub-markets – fertility treatment, dermatology, cosmetic surgery.

Long term high growth sector

Where is the opportunity for Warrnambool?

Tourism – As visitors seek space, nature holidays, high-end experiences and entertainment.

Opportunity lies in enhancing our City's competitiveness as a primary visitor destination.

- A well-established visitor economy by the coast with natural assets and a rich indigenous and maritime history.
- Renewing and expanding our tourism infrastructure – the new generation tourists seek high-end experiences and entertainment.
- Investment in Brand Warrnambool marketing campaigns, hotel capacity (high-end) and people skills.
- International Tourism – our proximity to Asia capitalises on the burgeoning Asian middle class and their demand for international travel. China already has the largest spend per visitor.
- Potential leverage off growing economic ties with the Warrnambool's Sister City of Changchun in China.
- Our education institutions can act as a 'drawcard' for foreign students who become 'education tourists' by encouraging family and friends to visit.

International Education – as students seek to study in an English-speaking country

Opportunity lies in attracting international students to our educational institutions.

- Teaching foreign students is Australia's fourth biggest export earner.
- Highly competitive global sector but global demand continues to soar. The rise of China and India in particular will be central to the growth in globally mobile students.
- Strategic objective of both Deakin University Warrnambool campus and South West TAFE to pursue international education opportunities.
- Target markets to initially include Philippines, Sri Lanka and China.
- Potential leverage off growing economic ties with Warrnambool's Sister City of Changchun in China.
- Courses must be tailored to meet needs of foreign students and play on the strengths of our region (eg. agriculture and tourism).

Gas – clean energy source as countries seek to improve air quality and reduce greenhouse emissions

Opportunity lies in servicing, transport and logistics.

- Tapping and exporting gas is likely to continue to be one of our nation's brightest growth engines over the next 20 years.
- Already a large scale presence of an energy company off the back of long-term gas reserves in our region.
- Potential to grow a significant number of small service companies – engineering skills, project management services, logistics for gas transport, offshore manufacturing capacities.
- Associated gas transport and logistics opportunities. Securing the helicopter (and associated maintenance) operations at Warrnambool Regional Airport to commute to gas fields remains a high priority.

Water and wastewater services

There is an opportunity to attract new industry investment requiring high quality and quantity of water in their production.

- The region will continue to benefit from a stable and reliable water source compared to other areas of Victoria.
- Opportunities in recycling.
- Waste sought after for the production of biofuels.
- Remediating waste water for domestic use.

Consulting with our Local Business Leaders

The material in this Strategy draws on industry research and consultation with our business leaders.

A stakeholder consultation process involved one-on-one interviews with over 30 business leaders across a broad range of industry sectors.

Councillors have also inputted into the development of this Strategy through Councillor Workshops and briefings.

This Strategy has also been influenced by a period of wider business and community feedback where public submissions were received.

Engagement (formal or informal) will continue to occur over the life of the Strategy to ensure regular feedback and progress of the Strategy to stakeholders.

A review of viewpoints gleaned from the consultation and submissions process shows many topics of relevance to the ongoing economic development of the City of Warrnambool. Some key themes and initiatives raised included:

- Achieving leadership in Economic Development and building capacity for future business leaders
- Building a diversified economy
- Promoting Warrnambool's competitive advantages

- Raising education attainment levels and opportunities
- Addressing labour force skills shortages
- Achieving improvements across transport links – road, rail and air
- Keeping young people in the region
- Supporting the role of our City Centre
- Establishing our City as a centre of food processing excellence
- Promoting liveability and amenity of our City to visitors
- Getting our business community ready for high speed broadband
- Attracting a greater share of public sector employment opportunities
- Recognise the significance of our health sector to drive economic development outcomes
- Targeting high value industries
- Developing the Airport
- Improving the number and strengths of business networks to bind communities of interest
- Capitalising on the arrival of the National Broadband Network
- Improving power infrastructure
- Idea of business incubators to foster micro and small business
- Supporting our educational institutions, particularly local university
- Better tourism infrastructure
- Importance of a united Council to drive business confidence
- Agriculture underpins our service economy
- Investing in business attraction.



The Warrnambool Advantage

Our City has many positive attributes which will assist its future economic growth and development.

Diversity and resilience

The extract below is taken from *By These We Flourish: A History of Warrnambool, Second Edition (1987)*

"The three factories (.. Nestle, Fletcher Jones and Woollen Mill..) still form the backbone of the City's economy, and the future growth of Warrnambool remains very dependent on their continued prosperity."

The above extract referencing the three factories of Fletcher Jones, Woollen Mill and Nestle as the 'backbone of the City's economy' was relevant at the time of writing in 1987.

However, only a number of years later, two of these factories ceased to exist and the other one under new ownership in a significantly reduced scale in terms of employment.

The fact our City has continued to grow and prosper in the absence of two of these factories (and the other reduced in scale) is testament to the resilience and diversity of our local economy. New businesses and industries have emerged or materially grown in size to fill the void, benefitting from our City's competitive advantages.

Our City is not solely reliant on one industry but has an economy where many different sectors make significant contributions to our economy in different ways whether it be through measures such as employment, exports, wages and salaries, output, number of businesses.

Track record of Economic Growth

Our City, over many years, has achieved a steady and sustained rate of growth across its population, labour force and gross regional product.

An enviable lifestyle

With its coastal lifestyle Warrnambool is a great place to live, work and raise a family. People can choose to live in the city, new residential growth areas or semi-rural locations.

Regional Services hub

Warrnambool is one of Australia's top 50 cities by population and has transitioned itself as an important regional services hub offering high order health, education, childcare and professional services.





A City that produces and exports food

Our City is a hub for dairy and meat production in a safe and secure environment. Warrnambool has opportunities to contribute, in some part, towards the protein needs of a rapidly growing middle class in Asia.

A connected City

Warrnambool is connected to Melbourne by direct return train and flight services, and Princes Highway by road. Global export produce can be moved by road, rail, air or sea from regional connections. NBN rollout construction for high speed broadband will commence in 2015.

An Education City

The City's educational institutions include Deakin University Warrnambool campus, South West TAFE and a range of state and private schools.

An export-oriented service sector

Knowledge industries are a growing proportion of our economy. Our City has significant potential to grow key service exports, including education, tourism and professional services.

Competitive business costs

We are a regional city without many of the high costs associated with capital cities. Labour, facilities, and utilities costs compare favourably to similar sized locations in Australia.

25+ year zoned supply of land

Long-term supply of zoned residential and industrial land to guide planned growth of our City. A newly opened Regional Aviation Park to attract aviation related business at the Warrnambool Regional Airport.

A Visitor Economy

Tourism and Major Events bring vibrancy and new money to our local economy throughout the year.

Affordable living

Relative to capital cities in Australia, Warrnambool offers affordable living with relatively low-cost housing and journey to work costs.

Water

Accessible levels of water availability make the city an attractive location for industry, particularly those that are water-intensive.

High amenity

Warrnambool consistently scores well with residents and visitors on the high standard of presentation of our public areas.

Threats and Challenges

Our City has achieved significant milestones towards strengthening our local economy over the past decade.

Further hard work is needed to ensure the momentum continues through major strategic projects currently underway, or in planning.

Based on population growth forecasts there is a need to create an additional 4,000 new jobs, possibly more, over the next 20 years. Future economic growth and prosperity however is far from guaranteed.

This Strategy endeavors to positively influence a range of economic indicators and conditions that point to a number of threats and challenges ahead.

- Findings from the Warrnambool Annual Business Confidence Survey show a discernible softening in perceptions of business confidence in our City over the past five years.
- The value of building approvals in Warrnambool has been reducing year on year since 2010-11 placing pressure on some areas of our local construction sector.
- Lower than state average tertiary attainment and participation.
- Any significant contraction of expenditure and infrastructure investment by State and Federal Government may impact adversely on regional cities such as Warrnambool.
- Any significant deterioration of macroeconomic conditions and investment confidence in Victoria and Australia.
- Any adverse impacts on the overall viability of our major processing and export-orientated businesses.
- The potential loss from our City of any particularly large businesses and industries.
- Any potential major reduction in expenditure and investment commitment by major educational institutions such as Deakin University and South West TAFE.
- The potential for any major reputational damage for Warrnambool stemming from any sustained adverse media publicity – we must remain alert and responsive to this potential at all times.
- Continued acute shortages of skilled personnel in a range of vital industries and sectors.
- Strong competition for the attraction of business investment, government infrastructure support, tourism and major events from a range of other regional cities.
- Upgrades required to road and rail links.
- Flat-line tourism visitation numbers across the region over the past five years.
- Fluctuating levels of regional unemployment, including high youth unemployment.
- Shortages in the provision, affordability and diversity of quality rental housing.
- Shortages of professionals/ workers in key industries related to health, dairy and food manufacturing.
- An ageing population and subsequent increase in dependency ratios, both of which are expected to increase.



Warrnambool Strategy

– Priorities

The Warrnambool Economic Development & Investment Strategy (2016–2020) focuses on five key areas to help categorise the wide range of initiatives considered most important to optimise the economic growth of our City and help achieve our ambitious vision.

The five areas are:

- 1. Economic Leadership and Collaboration**
- 2. Infrastructure and Transport**
- 3. Investment Attraction and Business Support**
- 4. Skills and Employment**
- 5. Visitor Economy and Regional City Liveability**

The initiatives listed in this strategy have been identified by consulted local business leaders and/or are a well-established direction or project imperative of the City of Warrnambool and other tiers of Government.

Economic Leadership and Collaboration

Leadership and collaboration are essential components in the delivery of economic development projects and require the unified efforts of business, industry, community and all tiers of government.

The importance of leadership as a critical contributing factor for the differential growth of cities and regions has long been recognised. The extent to which unified and strategic business leadership is achieved will heavily influence the growth and prosperity of our City.

It is important for Warrnambool to accelerate its focus on developing and sustaining positive public “perceptions”, not only in the mind of its own business community and residents, but equally if not more importantly in the minds of investors and government leaders across our State and Nation.

The way a community is perceived by people beyond its immediate area not only has a major bearing on local civic pride, but importantly attracting new residents, in stimulating new business investment and reinvestment, and determining future economic prosperity.

Leadership / Advisory Model

Convene an Economic Development Advisory Group which draws together representatives from Council, business and industry, government and other stakeholders.

Identify and mentor potential business and community leaders to promote our City's competitive strengths, values and attributes.

An economic leadership group will be established to advise, monitor and promote the City's Economic Development initiatives arising from this Strategy (2015-2020).

The group will also provide a platform to support the emergence of the next generation of our City's business and community leaders.

Promotion of Economic Development Services

Strengthen the profile and awareness of Council's investment facilitation and business services offering, the celebration of achievements made by local businesses and general showcasing of the City's competitive strengths.

Council's Economic Development Team should generally be the first point of contact for business-related enquiries. With a renewed focus on attracting investment and growing jobs in our City, it is important that our local business and industry is aware of the role of the Economic Development Team, its capacity to influence economic outcomes, and the range of investment facilitation and business support services on offer.

Collaboration

Foster strong relationships with relevant State and Federal Government Departments to ensure co-ordination and support for economic development initiatives at the local level in Warrnambool.

Support and participate in economic development initiatives driven by Regional Cities Victoria and the Great South Coast Economic Growth Pillar Group.

The formation of robust relationships and ties with key government stakeholders on a regional, state and national level provides leaders a platform to elevate opportunities and leverage investment and resources to deliver strategic projects in our City.

Support active collaborative alliances between Council and business membership organisations that have the expressed objective of supporting economic development and training programs in our City and wider region.

These groups might include Commerce Warrnambool, Great South Coast Regional Executive Forum, Business Professional Women (BPW) South West, Young Professionals Warrnambool, Leadership Great South Coast, Tourism Association, Westvic Dairy, Horizon 21, Victorian Employer Chamber of Commerce and Industry, Industry Capability Network – Great South Coast.

Create a regional network of existing international expertise and relationships to help forge stronger business and industry linkages outside the region.

There are numerous businesses in our City doing business in global markets. This initiative is designed to connect interested businesses (producers, logistics companies, banks, financial advisors) to share knowledge and promote our City to the wider world well beyond our municipal boundary.

Ensure the priorities contained in this Strategy are aligned with the principles of the Warrnambool Planning Scheme to encourage appropriate development.



Infrastructure and Transport

Warrnambool provides the infrastructure base for a 34,000 resident population and a wider regional catchment of 120,000 persons. Infrastructure provision is crucial to attracting investment that will spur productivity and job creation.

Access to reliable and high quality infrastructure drives business growth, productivity, and can influence decisions about business locations.

Our City has a clear advocacy role to ensure infrastructure and key transport links are maintained and enhanced to meet the needs of a growing economy. Council also has a role to play in providing quality local infrastructure which lifts the City's amenity and attractiveness.

The City of Warrnambool must continue to directly deliver, or effectively advocate and plan for, a range of infrastructure and transport initiatives that will lead to a more liveable and productive regional city.

From a business perspective, the performance of the transport network is measured by the cost and ease of connecting with customers, suppliers and markets. Good transport also gives business access to a larger and more specialised workforce and facilitates more frequent communication and collaboration between businesses and workers, which is critical to driving innovation.

Many of these initiatives will be undertaken in partnership with one or a combination of the Victorian State Government, Federal Government, and numerous other public and private organisations. Other infrastructure projects may be entirely private sector-driven but will be aided by investment and business facilitation support.

Together, our actions around infrastructure and transport will be critical drivers of economic growth, job creation, enhanced service delivery and improved amenity for our community. Major infrastructure and transport priorities over the next five-year period are detailed below:

Warrnambool Hospital Development

Advocate for the development of the \$100 million Stage 2 Warrnambool Hospital.

The \$100 million Stage 1 development of the Warrnambool Hospital was successfully completed in 2010.

Stage 2 involves significant additional capacity for both the Operating Theatre suite (an additional 2 operating theatres) and the Emergency services.

Around half of the patients admitted to Warrnambool Hospital reside in other parts of the region outside our City's municipal boundary reinforcing the truly regional role of our City's health service.

Development of Stage 2 will ensure the Warrnambool Hospital is able to meet the growing demands of our regional community's healthcare needs.

Securing State Government funding for the \$100 million Stage 2 development is one of our City's highest priorities and is also identified as a major priority in the Great South Coast Regional Strategic Plan.

High Speed Broadband

Form a working group of business and industry 'champions' of digital technology to promote the capabilities and benefits of high speed broadband.

Work with telecommunication providers to ensure the delivery of high speed broadband infrastructure and services across the City, with a specific focus on project locations where productivity and innovation will be maximised.

Warrnambool boasts the most modern technology of any Australian Telstra exchange and its residents now have access to mobile broadband download rates equivalent to their city counterparts.

An \$18 million refurbishment of the exchange was completed in mid-2013 following a fire at the exchange in November 2012 and has brought the infrastructure up to speed with modern communication demands.

The rebuild included a broadband equipment upgrade, 4G improvements, new voice switching equipment, transmission equipment including routers and switches and building works.

Warrnambool's scheduled rollout of the National Broadband Network (NBN) has been brought forward from 2020 and will now commence in 2016.

Technology is disrupting traditional supply chains and business models. More and more devices are connecting to the internet and the cloud, with data being used to optimise everything from fridges to transport to power networks. It is also broadly acknowledged that business and industry that is digitally engaged perform better and provide greater employment productivity.

Most high growth industries into the future will require an active ICT role. Agribusiness for example, where there is potential ranging from water-saving sensor systems to biotech developments, or in food processing where ICT impacts robotics and systems automation to more sophisticated engineering systems and safety technologies. Professional services are also being increasingly driven by ICT-enabled, lower cost models.

Technological innovation will continue to create more opportunities for skilled workers to service high value industries and work from a distance. These initiatives attached to High Speed Broadband will be critical catalysts for the growth our local economy.

City Centre Renewal

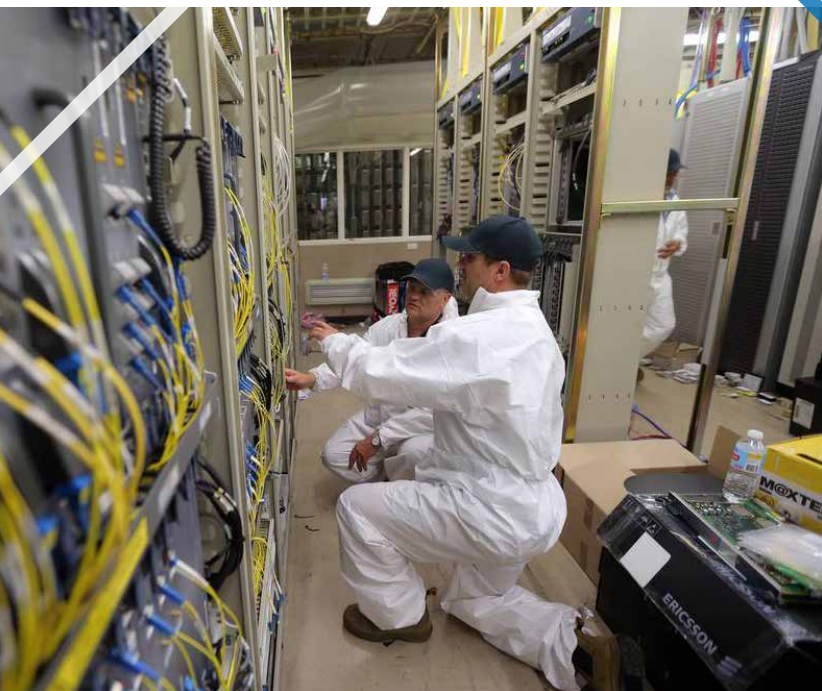
Support the renewal activities of the Warrnambool City Centre.

Warrnambool's City Centre is the most significant retail, commercial and services precinct in the Great South Coast region. It is a major focal point of employment in Warrnambool particularly for small businesses.

The development of vibrant CBDs in regional capitals is following the same principles and models of metro cities with an emphasis on providing an environment that supports a range of economic and social activities.

The City Centre makes a significant contribution to the service needs and liveability characteristics of not only our own community but increasingly the communities within the wider Great South Coast region.





Ensuring that our City Centre attracts and retains a variety of businesses, users and visitors requires detailed, long-term planning and in many cases, investment in rejuvenation and upgrade works that are primarily funded by local and state governments.

Planning for the rollout of physical improvements and beautification of our City Centre is well advanced. This major initiative will require ongoing partnership and funding support from State Government and private enterprise.

Rail Infrastructure and Services

Advocate for increased passenger rail services and modernised rolling stock between Melbourne and Warrnambool.

Timely, faster and reliable passenger rail services is a high priority as rail patronage demand and strain on ageing rolling stock continues to grow.

More frequent and potentially faster services could be integrated with rail services departing from Geelong. Implementation will require collaboration with State Government.

Continue to support and advocate for the priorities of the Warrnambool – Melbourne Rail Freight service and the associated Warrnambool Intermodal Terminal.

In partnership with stakeholders and the Victorian Government, investigate the need for a Warrnambool Freight Study.

Investigate the development of car parking on the Vic Track-owned land at the Warrnambool Railway Station.

Advocate to the Victorian Government seeking the upgrade of the Warrnambool Railway Station.

Ensuring that our City Centre attracts and retains a variety of businesses.

Warrnambool Regional Airport Infrastructure and Services

Support the development of Warrnambool Regional Airport including the construction of a lengthened and strengthened main runway.

Promote, and where possible, support the flight passenger service between Warrnambool - Melbourne.

Warrnambool Regional Airport is located in adjoining Moyne Shire Council but is owned and operated by Warrnambool City Council.

Early 2015 saw the return of a direct flight passenger service between Warrnambool - Melbourne. This passenger service is important to service the growing business needs of Warrnambool and the wider region. The Airport also serves as a major emergency services hub in south west Victoria.

The current composition of the main runway will not meet the future needs of aircraft operators. The next phase of major infrastructure necessary at the Airport will be lengthening and strengthening the main runway to accommodate a larger range of aircraft.

Princes Highway West Road Upgrades

Advocacy for further upgrades to the Princes Highway west of Colac to Warrnambool.

Our region is forecast to carry one third of all Victorian road freight by 2020, the largest proportion of any region in Victoria. The Princes Highway is a major road corridor that connects Warrnambool to Geelong and Melbourne.

Additional passing lanes west of Colac to Warrnambool would significantly enhance the safety and efficiency of this important road corridor.

Waste and Water, Renewable Energy

Support the Wannon Water Authority's ongoing investment in water-security infrastructure.

Target investment attraction to business and industry requiring high quality water resources.

Investigate the feasibility of new and emerging waste to energy treatment plants and processes.

Support research and development in clean energy sources, particularly solar, wind and gas.

New Library and Learning Centre

Partner in the development of a new library and learning centre.

A modern library is an important civic facility in a growing regional city that serves a dual community and education purpose. Our current library was built in 1976 when the City's population was broadly half of what it is today.

Our library draws over a quarter of its users from outside the Warrnambool municipality, again highlighting the important regional role of our City's civic infrastructure and services.

Warrnambool City Council and South West TAFE are investigating the development of a shared library.

Our region is forecast to carry one third of all Victorian road freight by 2020.

Investment Attraction and Business Support

Securing private and public sector investment is a key driver of economic growth and job creation.

It is important that our City provides an economic environment conducive to investment and business growth leading to greater employment opportunities for our community.

Investment is supported through facilitation, assisting proponents to select suitable sites, work through regulatory requirements and planning approvals, and the provision of up-to-date economic data to inform investment decisions.

The importance of large employers to our City is significant, not just for the direct employment they create but also the indirect employment generated.

Whilst large employers are major economic contributors, it is also important to recognise that it is the many small to medium sized businesses that, in aggregate, employ most people in our City. This Strategy aims to strengthen support towards existing business.

An existing business expansion and retention program will focus on engaging with businesses and providing events and education opportunities for local businesses.

Facilitate Investment in Key Economic Precincts

Identify the needs of our City's key economic precincts and facilitate appropriate investment within these precincts.

Develop an investment prospectus promoting the City's attributes and opportunities to attract new businesses and industries to Warrnambool.

Work with property agencies to identify investment-ready sites

Priority precincts include:

- The attraction of investment, development and activity that will contribute to the revitalisation of Warrnambool's City Centre.
- The securing of new and expanding aviation-related businesses to establish on-site at the recently upgraded Warrnambool Regional Airport.
- The facilitation of investment at Warrnambool's second general industry hub – Gateway Business Park on Horne Rd.

Other economic precincts important to the economic growth of our City include:

- Eastern Activity Precinct
- Foreshore Precinct
- Fletcher Jones site
- Centro North Warrnambool
- North Dennington
- Proposed restoration and adaptive re-use of the *Fletcher Jones* site
- West Warrnambool Industrial Estate.





Plan for an Economy of the Future

Work with partners to research industry sector business cases to encourage development of high growth industries in our City such as:

- Food and agriculture
- Tourism
- International education
- Health
- Gas and renewable energy
- Water and waste services.

Prepare an industry sector development prospectus for high value industries that offer the greatest potential to succeed.

This is an important initiative to continue planning and challenging our thinking of how our City moves from protecting the jobs of today, to creating the jobs of the future.

Targeting the attraction and expansion of high value industries has potential to generate significant new employment in our City to 2030 and beyond.

Sector business cases are required to better understand the dynamics and fundamentals of these significant growth industries and to explore approaches to foster their growth and prosperity in Warrnambool.

The industry development prospectus is designed to identify and promote specific opportunities (short, medium and long term) by sector specialisation for businesses to expand or relocate to Warrnambool.

A Warrnambool economy of the future must play to our strengths, and be guided by emerging global trends. Sectors such as Tourism, Agribusiness, health, gas and international education have been identified as high value industries for our nation that are likely to trigger significant job creation into the long term.

It is not lost on our civic and business leaders that many of the aforementioned industry sectors already form an integral part of our City and wider regional economy.

The challenge is how we research, plan and ultimately harness the economic opportunity to materially grow these high value industries in our City.





Support for Food and Agriculture

Development and promotion of Warrnambool as a regional centre of excellence for food production.

Collaborate with the Victorian Government towards supporting the Food and Fibre Agenda.

Support the implementation plans of the Great South Coast Food and Fibre Plan and the Western Victorian Dairy Strategy.

Encourage the development and export of our region's agricultural produce and services.

Continue to strengthen economic relationships with our Sister City of Changchun in China (and other global markets) to create new markets for our region's products, and leverage potential tourism, education and other opportunities.

Advocate for and support businesses seeking international export licenses to grow the volume and range of our local products to the world, and in particular Asia.

Develop case studies to demonstrate and promote the opportunities for our region from the activation of the Free Trade Agreements with China, Japan and Korea.

Rapid economic growth in Asian markets and the signing of Free Trade Agreements with China, Japan and Korea will create opportunities for Victoria's regions. Engagement in international markets helps local businesses to constantly innovate and lift their competitiveness.

Competing globally also brings access to new technologies, products, skills, and business models. This helps to explain why export-oriented businesses and sectors are generally more competitive than average.

The globalisation of Asia is a key driver. Our City and wider region holds a competitive advantage in tourism and the production of food. More jobs in services and higher skills requirements across all sectors.

In an increasingly global market, export development is a critical element of economic growth in regional areas. Warrnambool has an important export sector which focuses primarily on food processing.

Warrnambool is well placed to improve its manufacturing performance, however, targeted strategies will be required and these include upskilling the workforce, improving market access and strong trade promotion.

Stronger Support for Small Businesses

Continue the successful Warrnambool Business Visitation Program.

This initiative seeks to have our Economic Development Unit engaged with local businesses and positioned to provide services and assistance when needed. During individual visits, strong relationships with local business can be formed and benefits realised including better understanding of specific industries, trends, challenges, opportunities and local business achievements.

Investigate the development of a Micro Business hub model in Warrnambool focused on providing offices for start-up businesses and other business support services.

Micro and new small businesses can be encouraged through the investigation of the suitability and feasibility of an incubator and business support centre model.

Facilitate mentoring and high quality training workshops that meet the needs of small business owners, home businesses, and start-ups.

Host both formal and informal networking events targeting a range of business sizes and diverse sector backgrounds.

Deliver the annual Warrnambool Business Festival.

It can often be difficult for small business owners, immersed in the operations of their business to devote time and resources to professional development and training opportunities.

Held annually during the month of August, the Business Festival provides a comprehensive program of tailored and industry-specific training and events open to all businesses in our City. The Festival serves as an important month in our City's business calendar to seek business development opportunities and connect with other businesses and government.

Develop and analyse up-to-date economic and demographic data for investors and businesses in our city, including the annual Warrnambool Business Survey.

Residential Aged Care Plan

Working with partners, prepare a Residential Aged Care Sector Plan designed to better understand the economic development opportunities associated with this growth industry and to explore approaches to accelerate its growth in Warrnambool.

The largest trend affecting Australia in coming decades will be an ageing population. This will generate a host of recession-proof domestic needs. By 2030 one in every 18 of us will be over 80. The peak years for baby boomers accessing aged care is expected to occur in the late 2020s and the youngest of them will follow throughout the 2030s.

More residents are expected to require care and they will increasingly have the funds to pay for better quality care. Aged care facilities require skilled professionals to meet the demands of new retirees and have the potential to be a significant employing sector in our economy.

Funding models for Strategic Projects

Develop and advocate for alternative funding models to finance economic development initiatives in our City.

Funding infrastructure in the region continues to be a challenge. The concept of alternative funding models (for example, Municipal Bonds) has been raised in various rural and regional inquiries and particularly from members of the Champions of the Bush, South West Victoria. This initiative seeks to support further investigation of the development of alternative funding models to finance strategic infrastructure projects for the benefit of our City and region.

Skills and Employment

In the Great South Coast region, only 57% of young people achieve Year 12 or equivalent. The State average is almost 75%.

A growing body of research shows that more inclusive and equal societies are more resilient in the face of economic change. Societies where the vast majority of citizens have broad capabilities (such as good health and education, and broad employment skills) have greater capacity to sustain growth than those where a significant proportion of the community lack the skills needed for economic participation.

A common message from our business community is that there is a shortage of skilled personnel or difficulties attracting skilled workers or difficulties retaining a workforce.

Quality education and training opportunities must be growth areas for our City, particularly as the population and industry grows.

Linkages between training providers and research organisations, government and industry are important for growing the innovative capacity of the region.

Deakin University and South West TAFE campuses in Warrnambool are well placed to build this capacity. Higher levels of educational attainment are also generally associated with enhanced employment prospects and higher income.



Deakin University Warrnambool

In partnership with Deakin University's Warrnambool Campus, support the implementation of the Deakin Warrnambool 2020 Strategic Plan.

Advocate and support for the promotion of Warrnambool as a "University City" through shared initiatives with Deakin University Warrnambool Campus.

Continue to support the development of Deakin University's Warrnambool Medical School.

South West TAFE

Advocate to the Victorian Government seeking the appropriate resourcing of Warrnambool-based South West TAFE to ensure the provision of a responsive vocational training sector and apprentice support programs designed to serve the needs of local employers.

Facilitate and support education providers with school-to-work and higher education to work links with industry and businesses.

The capacity of our education sector in Warrnambool, in terms of the distribution of primary, secondary and specialised education, higher education learning and research, and trade and technical skill centres, presents a strong foundation upon which to build structures to support future workforce and skills development.

International Education

Leverage and support opportunities for Warrnambool's Deakin University, South West TAFE and secondary schools to increase the intake of international students

International Education is a competitive field, particularly against the likes of the US, UK, and Australian capital city markets with their large populations and long standing institutions. However, global demand for educational services remains strong and the rise of China and India in particular, will be central to the growth in globally mobile students.

Whilst Warrnambool's educational institutions will never compete with larger population centres on scale, as a City we do have a range of strong and defensible advantages that justifies why Warrnambool should be seeking to increase the presence of international education in our economy – enviable lifestyle, specialised course offerings tailored to our strengths such as agriculture, strengthening cultural and economic ties, free speech and expression, positive attitudes to multiculturalism, a potential path to residency and filling skill shortages to name a few.

Our educational sector should also act as a drawcard for 'international education tourists' who encourage friends and family to visit our City.

These initiatives will be delivered through partnerships with Deakin University and South West TAFE.



Secondary Education

Support and contribute towards actions of the Great South Coast *Beyond the Bell* Project to improve education attainment levels.

This initiative is a collaborative project involving families, business, community organisations, schools and all levels of government to improve our young people's chances of attaining Year 12 or equivalent and better prepare them for a successful transition to the next phase of their lives.

Workforce

Work with industry partners to provide timely updates to industry and government of major skills shortages in the Warrnambool workforce.

Advocate for support from the Victorian and Australian Governments for the reintroduction of support for Warrnambool and region to reinstate its successful Skilled Migration Program.

Work with partners to get our local providers NDIS ready and maximise the local economic and skills benefits from this significant change to the service model.

Partner in a "Warrnambool Careers Expo" program designed to connect educators, employers, students and unemployed persons.

Increasing Public Sector Employment

Advocate to the State and Federal Governments for the relocation of further public sector jobs to the regions, including Warrnambool.

Our local economy benefits from a strong public sector presence. Around a third of our City's labour force is driven by public sector entities such as schools, hospitals, government, and various community entities.

As the major regional centre of the Great South Coast region our City is ideally placed to increase the level of regional government services available to our residents and wider regional catchment.



Visitor Economy and Regional City Liveability

Warrnambool has a well-established visitor economy. Our City enjoys high visitation levels compared to many other regional centres. However, recent visitation trends to our City and wider region are relatively flat.

A quality visitor experience can significantly add to the perception of a City and region as a place to do business. It is the Visitor Economy that often attracts new residents to our City, an experience of what it might like to live in a coastal regional city.

The visitor economy (whether it be recreational tourism, visiting family and friend and/or business travellers) is 'new money' contributed to the local economy which supports jobs, real estate value and the provision of services, facilities and activities in the community.

Liveability attributes are important for economic development. A liveable city is attractive to new residents, who provide depth to the local workforce and demand.

This Strategy supports enhancing the liveability of Warrnambool in terms of providing an attractive living environment, including wide housing choice and a high standard of facilities and amenities, so as to not only attract new residents and to increase the City's appeal to visitors, but to retain those already resident.

Visitor Economy

Support the promotion and implementation of priorities of the Destination Action Plan for the Warrnambool Tourism area.

This initiative involves continuing to support and collaborate with the Warrnambool Tourism Association, Great Ocean Road Regional Tourism Ltd, and relevant stakeholders to:

- Develop and consistently promote a unique market positioning and brand for Warrnambool

- Develop product and experiences to match visitor demand and improve seasonal dispersal
- Implement the Flagstaff Hill Master Plan to revitalise the visitor experience
- Develop a visitor service excellence culture and capacity program
- Determine and promote the value of the visitor economy to the community.

Support the development and assessment of new tourism proposals, including Crown Land proposals.

To ensure that Warrnambool grows its share of the tourism market there needs to be a strong focus on encouraging and attracting visitors through effective marketing and positioning of the City and its attractions, product development, and investment in tourism infrastructure throughout Warrnambool.

Investigate the need for and feasibility for the establishment of a regional-scale conference facility in Warrnambool.

Warrnambool hosts a number of conferences of regional and state significance.





Recreation, Arts and Culture

Ongoing support for the development and maintenance of recreational, arts and cultural facilities, essential for supporting and promoting the liveability and attractiveness of our City.

Support the growth of creative industries and awareness of their economic value across our business community.

Investment in quality recreational, arts and cultural facilities not only improves the liveability of Warrnambool but also plays an important economic role through the attraction and retention of residents and visitors.

In recent years our creative industries have grown in prominence.

Major Events

Work with partners to investigate the attraction of new and emerging major events based on our City's strengths and calendar gaps.

Warrnambool City Council manages and delivers a range of events as well as providing support to external events held in our City.

A calendar of major events throughout the year attracts large numbers of visitors to our City, particularly during off-peak months.

Existing major events on our calendar include:

- Grand Annual Sprintcar Classic
- May Horse Racing Carnival
- Fun4Kids Festival
- Wunta Fiesta
- Tour of the South West (Cycling)
- Sports carnivals (many and varied).

Events development presents a significant opportunity for Warrnambool, particularly with regard to business and conference events, sports and cultural events, and festivals. For example, the inaugural Warrnambool Aus Music Festival will be held in 2016 which will be an Australian themed music festival.

Support the development of inner-city living in the Warrnambool City Centre and surrounds.

This initiative encourages the development of quality, higher density, inner-city residential living as a means of enhancing economic vibrancy in and around the City Centre.

Implementation

This Economic Development and Investment Strategy will guide Council for the next five years. It includes practical initiatives organised across five key areas.

The Strategy will remain broad in focus and pointed towards 2020, but will have associated with it an Implementation Action Plan.

Without effective implementation this Strategy will not succeed. The success of the Strategy will be determined largely by the development, resourcing and delivery of detailed Annual Implementation Action Plans to drive and monitor this Strategy.

Annual Implementation Action Plans will consider the resources required to help deliver the priority initiatives identified in this Strategy. Being an annual program, it will be flexible to adjust to the changing market dynamics as well as new opportunities that may present themselves.

The various activities involved in implementing the Strategy will be carried out across Warrnambool City Council, in liaison with the Victorian and Australian Governments, and the wider business and industry community.

Monitoring and Measuring Success

In order to track the future development of the economy, there are indicators to demonstrate change over time:

- Population
- Employment
- Gross Regional Product
- Income and wages
- Skills
- Building activity.

Whilst Council does not have direct control or influence over the economic indicators listed above, these measures can demonstrate positive growth towards our City's vision for 2020.

Council's performance (and that of the Economic Development Team) will have an additional set of measures that it can control through a detailed Annual Implementation Plan.

It is important that Councillors not only monitor progress of the Strategy, but also assist in its implementation wherever possible by promoting the Strategy and remaining united in their advocacy to achieve the 2020 vision for the benefit of the City of Warrnambool.

Collaboration

Warrnambool City Council's Economic Development Team will work with many partners to achieve the initiatives detailed in this Strategy including but not limited to:

Victorian State Government Departments and Agencies

- Regional Development Victoria
- Department of Economic Development, Jobs, Transport & Resources
- Department of Environment, Land, Water and Planning
- Department of Education and Training
- Department of Premier and Cabinet
- Department of Treasury and Finance
- Tourism Victoria
- VicRoads

Regional bodies

- Regional Development Australia Barwon South West
- Regional Cities Victoria
- Great South Coast Board and Pillar Groups
- Regional Mayors and CEOs forum



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