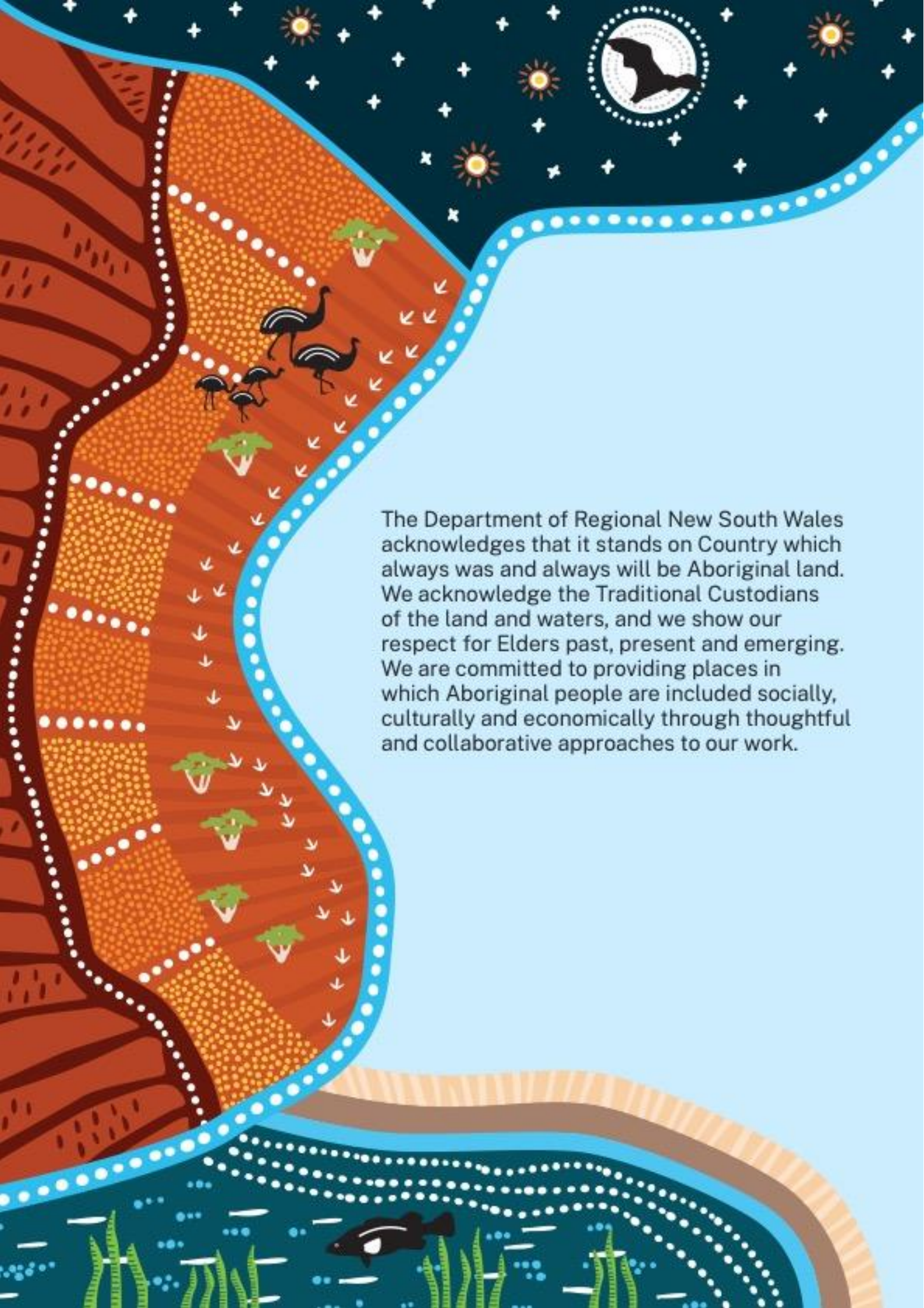


Eastern Riverina Regional Economic Development Strategy – 2023 Update





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

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The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Eastern Riverina region to the development of the 2023 REDS Update, with particular thanks to staff from Coolamon Shire Council, Junee Shire Council, Lockhart Shire Council and Wagga Wagga City Council. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers (PwC) and ProjectsJSA to help deliver the 2023 REDS Update project.

On Country – Artwork by Mumbulla Creative

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

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

Cover image: Avalon Farmstay, Lockhart Local Government Area. Photo credit: Grant Higginson.

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Table of contents

Table of contents	4
1. Executive summary	5
Changes in the Eastern Riverina region since 2018.....	5
Key themes from local consultation	6
Eastern Riverina REDS - 2023 Update strategies and enablers	7
2. About the 2023 REDS Update	8
3. About the Eastern Riverina region	9
4. The 2018 Eastern Riverina REDS	10
5. The big picture: Shocks and trends impacting the Eastern Riverina region since 2018	12
Significant events impacting major industries.....	12
Macroeconomic trends shaping the region's future	13
6. Responding to change: Initiatives and investments since 2018	15
Significant investments since 2018	17
7. Eastern Riverina 2023 economic snapshot	20
Demographic	20
Housing	21
Employment	22
Eastern Riverina region 2023 engine and emerging industries	24
Eastern Riverina region 2023 endowments	26
8. Looking ahead: Strategic opportunities for growth, resilience and liveability	27
Opportunities and vulnerabilities in engine and emerging industries	27
Key themes in stakeholder consultation.....	31
Growing the visitor economy	31
Eastern Riverina REDS – 2023 Update strategies.....	31
Key enablers of economic growth	32
9. References	35

1. Executive summary

Changes in the Eastern Riverina region since 2018

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

The Eastern Riverina region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



\$78.6 million invested to deliver the **Riverina Intermodal Freight and Logistics Hub**, located within the **Wagga Wagga Special Activation Precinct**.



More than **\$72 million** to upgrade **key railway infrastructure** across the region, with substantial further investment to come as part of the Inland Rail project.



Expansion of the Junee Correctional Centre totalling \$200 million.



\$30 million in private investment to expand **Junee Prime Lamb**.

The region has experienced significant population growth since 2018, coupled with very low housing vacancy rates and increasing job vacancies



3.1% population growth since 2018.



Housing vacancy rates sit **below 1%**, with median house prices having risen by **30% to 41%** since 2018.



Eastern Riverina has a **younger age demographic** than the NSW average, with a **median age of 37**.



Unemployment across the region is **lower than the NSW benchmark**, with job vacancies reaching an all-time high in the broader region of 2,472 in August 2022.

The Eastern Riverina's key engine industries continue to deliver sustained economic growth, in particular the public administration and agriculture sectors



Public administration and safety

+ **9.2%** Year-on-Year (YoY) growth from 2011-2020

\$ 1.222 million Gross Value Added (GVA) in 2020

3,808 jobs supported in 2021



Agriculture and food product manufacturing

+ **8.3%** YoY growth from 2011-2020

\$ 453 million GVA in 2020

3,735 jobs supported in 2021



Tourism

+ **3.1 %** YoY growth from 2011-2020

\$ 275 million visitor spend in 2021

6,444 jobs supported in 2021



Energy generation (including renewables)

+ **4.9%** YoY growth from 2011-2020

\$ 181 million GVA in 2020

465 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Eastern Riverina region have highlighted sustainable growth of their population, as well as the tourism and renewable energy sectors as being key priorities for the region.

Housing availability and affordability



Consultation input revealed concerns amongst stakeholders about current shortages and housing affordability challenges.

Workforce constraints



Significant pressures were highlighted in relation to demand for labour across many sectors, with a key focus needed on workforce attraction and retention across the region.

Growing the visitor economy



A focus is needed on growing and diversifying the region's visitor economy, targeting high value tourism markets and continuous attraction of visiting friends and relatives, business travellers and specialist health care travellers.

Eastern Riverina REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Leverage the region's strategic location by developing the transport and logistics and manufacturing sectors.</p>	<ul style="list-style-type: none"> • Support councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and prioritise locations for upgrades to telecommunications infrastructure, including but not limited to industrial estates. • Prioritise the agglomeration and attraction of advanced manufacturing, warehousing and processing at strategic locations.
<p>Support and grow agribusiness.</p>	<ul style="list-style-type: none"> • Encourage agricultural businesses to enhance their production by enabling the uptake of agriculture technology (agtech).
<p>Support the expansion and growth of the healthcare and social assistance sector.</p>	<ul style="list-style-type: none"> • Enhance the capacity of healthcare and other care economy sectors by collaborating with Murrumbidgee Local Health District (LHD) to support the delivery of an integrated regional healthcare model and health worker accommodation. • Collaborate with industry and training bodies to prioritise training opportunities for medical professionals, early childhood care workers and aged care workers.
<p>Upskill workforce and drive innovation and entrepreneurialism.</p>	<ul style="list-style-type: none"> • Develop a workforce strategy focused on developing insights and actionable strategies for attracting and retaining young workers and students. • Engage with businesses and education providers to ensure education and training programs support the development of an appropriately skilled local workforce to meet the future needs of the region, including the Wagga Wagga Special Activation Precinct (SAP).
<p>Maximise regional amenity and community infrastructure to expand the visitor economy.</p>	<ul style="list-style-type: none"> • Support a diverse visitor economy by encouraging the development of new tourism experiences, including major events attraction, and identify opportunities to support existing and potential future private sector investment in visitor accommodation. • Upgrade enabling infrastructure and support recycling and circular economy initiatives to meet growing demand from future population increases. • Identify opportunities to support the diversification of the region's affordable housing options and increase housing supply through a Regional Housing Delivery Plan.

2. About the 2023 REDS Update

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

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

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

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

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



Figure 1: Junee Roundhouse. Photo credit: Junee Shire Council.



Figure 2: Sunset over a farm in Coolamon Shire LGA. Photo credit: Angela Newton.

3. About the Eastern Riverina region

The Eastern Riverina FER is situated around the Murrumbidgee River. As shown in Figure 3, its Local Government Areas (LGAs) include Coolamon Shire Council, Junee Shire Council, Wagga Wagga City Council and Lockhart Shire Council. Wagga Wagga is the key regional hub city and home to around 80 per cent of the region’s population, with the other significant towns being Coolamon, Junee and Lockhart.

Total area covered (km ²)	12,184
Population (2021)	82,039
Coolamon	4,401
Junee	6,450
Lockhart	3,328
Wagga Wagga	67,860
Size of the economy (2020)	\$5.752 billion
Total employment (2021)	38,631

Source: Australian Bureau of Statistics (ABS) (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021).



Figure 3: The Eastern Riverina Functional Economic Region.

4. The 2018 Eastern Riverina REDS

In the 2018 Eastern Riverina REDS, the region was actively pursuing growth in its key industry cluster of transport and logistics and manufacturing. The 2018 REDS also identified agribusiness, healthcare and social assistance as growth areas with an increased focus on upskilling the workforce.





Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the strategy's approach to enabling economic development for the region. These endowments and specialisations are outlined below.

2018 Eastern Riverina strategies

	Leverage the region's strategic location by developing the transport and logistics and manufacturing sectors.
	Support and grow agribusiness.
	Support the expansion of the healthcare and social assistance sector.
	Upskill the workforce and drive innovation and entrepreneurialism.
	Improve utilities, energy and telecommunications.
	Increase efforts to attract new residents and visitors supported by improved amenity offerings.












2018 Eastern Riverina specialisations

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

	Defence
	Agriculture
	Food product manufacturing
	Healthcare and social assistance services

Eastern Riverina 2018 endowments

The Eastern Riverina is home to a wealth of physical, institutional, built and human endowments. These endowments play a key role in enabling success and growth across its industry specialisations.

Endowment	Relevant 2018 specialisation
Location – access to highly strategic transport routes	
Transport and logistic infrastructure	
Liveability and lifestyle appeal	
Natural resource endowment	
Public Sector Administration Facilities	
Natural resource endowment	
Healthcare infrastructure and services	
Education infrastructure	
Wagga Wagga Airport	
Human capital	
Local institutions and strong leadership	

5. The big picture: Shocks and trends impacting the Eastern Riverina region since 2018



Figure 4: Pomingalarna Multi Sport Cycling Complex, Wagga Wagga LGA. Photo credit: Wagga Wagga City Council.

Significant events impacting major industries

A sustained period of drought, followed by flooding and the mouse plague, had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged the region with local businesses, particularly those in the visitor economy, suffering from the impacts of movement and operating restrictions. From the period 2018 to 2022, the region had three disaster declarations^[1] and received \$2.7 million in disaster recovery grants.^[2] Recovering from key challenges and building both industry and community resilience is a key priority for the region.

Drought

The Eastern Riverina experienced significant drought conditions between 2017 and 2020, impacting the region's agricultural sector and economic activity across a range of other sectors.

The depletion of hay and feed grain supplies and reduced yields on broadacre crops put significant upward pressure on stock prices, increased production costs and created financial stress for many primary producers.^[3] It is estimated that total farm production contracted by 6% between 2017 and 2020, and that broadacre farm business profits in 2020 were the lowest recorded in 40 years.^[4]

Given the significance of agriculture to the region's economy, the drought also impacted on unemployment in the region, which is reflected by spikes in both 2018 and 2019 (see page 22). The largest impact was seen in Wagga Wagga and Junee, which experienced elevated unemployment levels above the NSW benchmark. Post drought estimates suggest that employment in the Riverina region may have been more than 3% lower in 2019-20 than it would have been otherwise.^[5]

Mouse plague

Along with a large part of regional NSW, the breaking of the drought in 2020 and bumper crops, along with wetter than normal conditions provided the perfect environment for an explosion in mice numbers, which led to a major mouse plague in 2021.

The National Farmers Federation estimates the cost of the mouse plague on farm gate value was over \$1 billion,^[6] with key impacts including damage to stored silo bags, contamination and destruction of stored grain, and damage to planted crops.^[7] To support impacted communities, the NSW Government made available up to \$95 million for primary producers in financial need, and \$45 million for the Small Business and Household Mouse Control Rebate. In the Eastern Riverina region, a total of \$3.08 million was paid to 6,094 recipients in households and small businesses as part of the mouse control rebate program.^[8]

Floods and storms

Throughout 2021 and 2022, heavy rainfall has caused high water levels in dams and significant overflows into the Murrumbidgee River upstream of Wagga Wagga.^[9] In late 2021, low-lying farms adjacent to rivers and creeks were inundated and there were major road closures.^[10]


Severe weather and flooding again impacted the region in late 2022, cutting roads and impacting low lying areas for extended periods of time. The Murrumbidgee River in North Wagga peaked at a major flood level of 9.72 metres in early November 2022, with more than 700 people evacuated from their homes.^[11] Disaster declarations were made for all four LGAs in the region as a result of the extreme weather in 2022.^[1]




COVID-19

The COVID-19 pandemic had a significant impact on business activity, with 49% of businesses reporting that COVID-19 negatively affected them.^[12] Jobseeker recipients rose by 49%, while Health Care Card recipients rose by 22% from March to June 2020.^[13] The closure of international borders and domestic travel constraints, including border restrictions and various lockdowns, had a significant impact on the visitor economy, with total visitor expenditure in the sector down \$87 million on 2019 levels and an estimated net decrease in visitors of 339,000.^[14]

Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate and migration have played a significant role in the development of the Eastern Riverina region since 2018 and are likely to continue to have a strong influence on its future. With a growing population of remote workers, impacts from natural disasters and a key role in the shift to net zero, the region faces both opportunities and challenges in building resilience and taking advantage of its comparative advantages.

Trend	Opportunities and risks	
 Digital transformation	<p>The COVID-19 pandemic has bolstered remote workers who are taking advantage of the regional lifestyle offering while maintaining metro-based employment.^[15] This is evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.^[16]</p> <p>Investment in improved telecommunications infrastructure since 2018 through the Connecting Country Communities program, such as the rollout of new mobile phone towers in Sunnyside (Wagga Wagga) and Ladysmith (Wagga Wagga) to address connectivity issues has helped enable improved outcomes, but further investment is required.</p>	<p>Accelerated digital transformation opens up online opportunities for businesses to scale up e-commerce capability to reach new markets.</p> <p>The surge for increased digital connectivity puts increased pressure on existing telecommunications infrastructure, creating reliability and service quality issues.</p>

Trend	Opportunities and risks	
 <p>Changing migration patterns</p>	<p>Increased COVID-19 related and project oriented migration to the region is likely to be a key contributing factor in increasing demand for enabling infrastructure in the region, especially housing. The competitive nature of COVID-19 related migration, which allows residents to live in the region while working in jobs that are based elsewhere means population growth does not necessarily translate into local employment.</p> <p>Retaining young workers, especially in hospitality and other population serving roles in demand, typically requires high-quality placemaking and amenity, ^[17] as well as a need for employment opportunities which can compete with out of region offerings.</p>	<p>A boost in population can increase local economic activity and attract new businesses to the region.</p> <p>However, population increases also places pressure on capacity of existing infrastructure and services, with challenges being faced in key areas, such as housing and care economy services.</p>
 <p>Towards net zero</p>	<p>The Wagga Wagga Special Activation Precinct (SAP) Master Plan creates a framework for the region to house a significant eco-industrial precinct with the goal of operating in a net zero emissions environment, with high levels of energy efficiency and integrated best practice water and waste initiatives. The SAP presents great potential to enable significant circular economy operations across the region.</p> <p>The ability for the region to leverage its land and solar resources provides an opportunity to capitalise on the growth trend in renewable energy projects, and this can become central to the Riverina's long-term economic growth.</p> <p>These major projects will bring significant investment and employment opportunity to the region. However, they can be accompanied by potential impacts on local amenity, housing availability and affordability due to population increases. There is a key need to apply a future-focused lens to the delivery of projects to ensure long-term benefits for the region.</p>	<p>Opportunity for the region to leverage new energy sector investments to provide more secure and greener energy to support business and industry development.</p> <p>A core challenge is how the region derives long term local benefit from new energy generation, especially after the construction phase.</p>
 <p>Rising uncertainty</p>	<p>With the frequency and intensity of natural disasters projected to increase in coming decades^[18], there is a need to enhance climate and economic resilience in the region. There is a key need to build community resilience, alongside enhancing resilience of infrastructure.</p>	<p>Rising uncertainty places upward pressure on inflation, driving up costs.</p> <p>Supply chain challenges promote a need for increased localisation of supply chains.</p>

6. Responding to change: Initiatives and investments since 2018



Figure 5: The Rock Nature Reserve – Kengal Aboriginal Place, Lockhart LGA. Photo credit: Destination NSW.

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

Strategies and plans	Relevant 2018 strategies
<p>The Riverina Murray Region Plan 2041 sets out a 20-year land use planning vision for the broader region to support economic growth in key sectors such as agribusiness, manufacturing and renewable energy. Each council's Local Strategic Planning Statement then sets out strategic planning objectives for each LGA.</p>	
<p>The Lockhart Shire Community Strategic Plan (CSP), Wagga Wagga CSP 2040, Junee Making Tracks CSP and Coolamon Shire 2040 CSP set out actions and priorities to deliver on the community's vision for each LGA, addressing key challenges and opportunities facing the region.</p>	
<p>The Wagga Wagga City Council Corporate Net Zero Strategy, Junee Renewable Energy Action Plan, and Lockhart Energy Savings Plan outline actions to reduce and offset emissions from council activities, providing opportunities for efficiency gains in utility use, energy consumption and environmental amenity.</p>	
<p>The Wagga Wagga Special Activation Precinct (SAP) Masterplan seeks to enhance the capability of the region's agricultural and manufacturing specialisations. This will enhance the region's locational and agribusiness strategies and create a framework around investment attraction to bolster high value production in agriculture and manufacturing.</p>	

<p>The Riverina Murray Destination Management Plan 2018 creates a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region’s visitor economy. This is supported by LGA specific plans including the Junee Shire Visitor Economy Action Plan 2021, the Wagga Wagga City Council Events Strategy Action Plan 2020-2024, and the Lockhart Shire Council Tourism and Economic Development Strategy 2016-2026.</p>	
<p>The Riverina Joint Organisation Eastern Riverina Regional Housing Strategy 2021 represents a strategic approach to helping ensure a sufficient, vibrant and viable housing sector across the region, that can provide a diversity of housing types to meet demands associated with a growing population.</p>	
<p>The Riverina Joint Organisation Freight Transport Plan highlights key priorities for transport and freight management planning across the Eastern Riverina region.</p>	
<p>The Lockhart CBD Masterplan provides a framework for development, seeking to create a liveable and vibrant environment for Lockhart, while reinforcing the town’s unique historic identity.</p>	
<p>The Coolamon Shire Settlement Strategy 2040 provides direction for long-term growth and development, focusing on sustainable settlement expansion with minimal land use conflicts, and the provision of water infrastructure for growth.</p>	
<p>The Wagga Wagga City Council Integrated Transport Strategy 2040 establishes a strategic direction for transport in the LGA that caters for a growing economy and population, within a context of rapidly changing technology and the environment.</p>	
<p>The draft Murrumbidgee Regional Water Strategy will help guide actions and priorities designed to deliver healthy and resilient water resources that can support a liveable and prosperous region.</p>	



Figure 6: Junee Licorice and Chocolate Factory. Photo credit: Junee Shire Council.

Significant investments since 2018

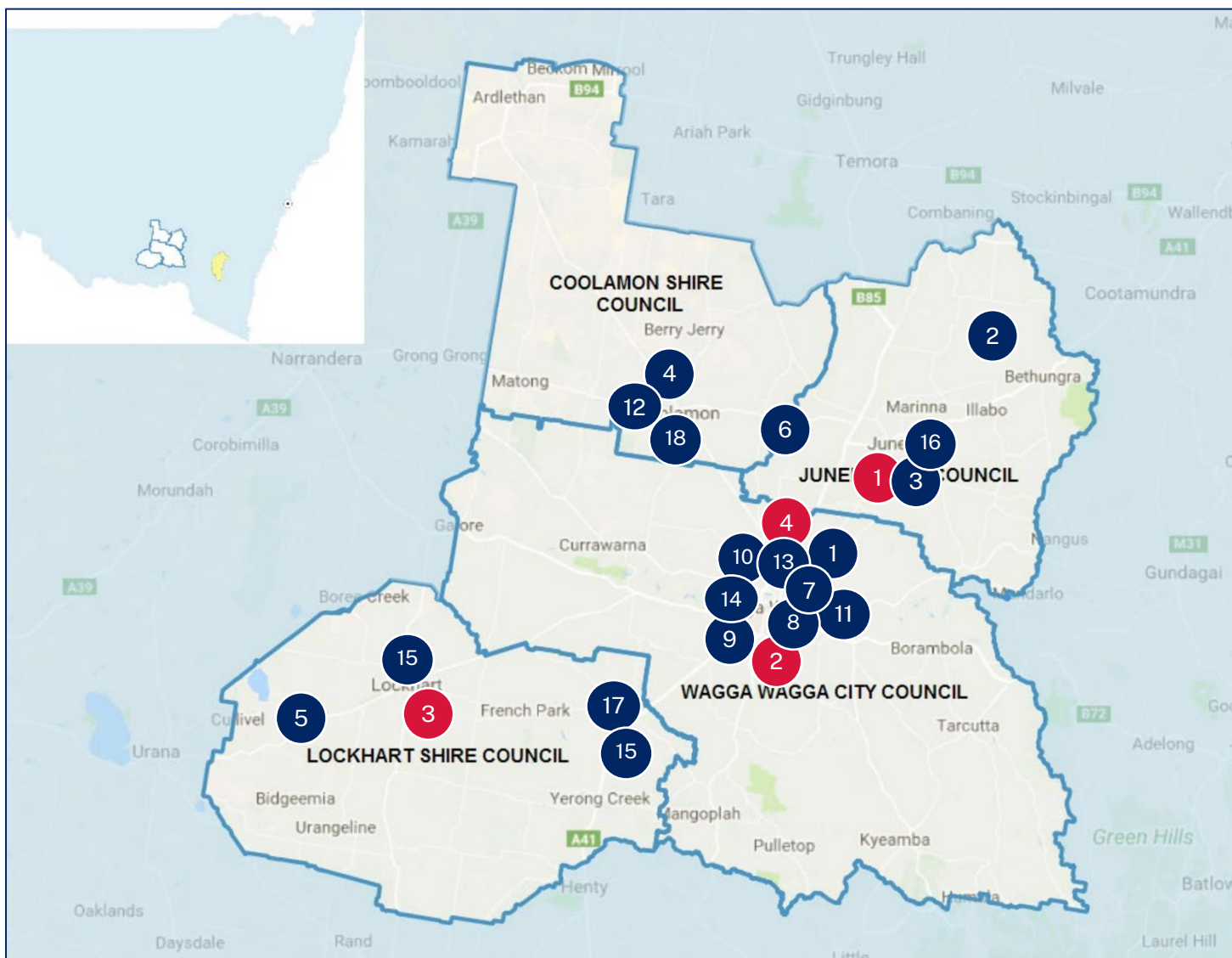









Figure 7: Map of significant investments in the Eastern Riverina region since 2018.

As shown in Figure 7, since 2018 the region has received significant local, state and federal funding, as well as private investment. These investments are at varying stages of progress with some delivered, some underway and some investments still in the planning stage. Major public investments have focused on delivering transport and precinct infrastructure upgrades, alongside a range of projects to support community and visitor amenity. Grants have played a key role in many of these projects.














Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Junee Prime Lamb expansion	\$30 million	 
2 FlipScreen Manufacturing Facility ¹	\$10 million*	  

¹ Supported by a grant from the NSW Government Regional Job Creation Fund

3	Lockhart Renewable Energy Project ¹	\$20 million	
4	Bomen and Wagga Wagga Solar Farms	> \$190 million	






Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 Strategies
1	Wagga Wagga SAP and Riverina Intermodal Freight and Logistics Hub	
2	Inland Rail – Albury to Illabo and Illabo to Stockinbingal sections	
3	Junee Correctional Centre Expansion	
4	Coolamon rail passing loop extension	
5	Lockhart to Urana road upgrade	
6	Junee to Griffith rail upgrades	
7	Wagga Wagga Health Services Hub ²	
8	Wagga Biomedical Sciences Centre	
9	Riverina Redevelopment Program - defence estate upgrades	
10	Southern NSW Drought Resilience Adoption and Innovation Hub ³	
11	DPI Advanced Gene Tech Centre	
12	Coolamon Business Park	
13	Wagga regional sporting facilities – Pomingalarna Cycling Complex, Multi-Purpose Stadium, Jim Elphick Tennis Centre upgrade	

¹ Supported by a grant from the Commonwealth Government's Community Development Grants Programme.

² The value listed is the total cost of the Wagga Wagga Health Service Redevelopment – the Health Services Hub is the third and final stage.

³ A combination of public and private funding has supported this project.

14	Wagga Wagga Riverside Precinct Rejuvenation stage ²	\$9.9 million	
15	Lockhart and the Rock swimming pool refurbishments	\$4.7 million	
16	Athenium Theatre Junee upgrades	>\$2.5 million	
17	The Rock Regional Observatory	\$0.27 million	
18	Coolamon showground multi-purpose exhibition and adaptive space	\$0.56 million	

Regional grant programs

The region has received \$105.31 million in approved grant funding since 2018. Key programs in the region have included the Growing Local Economies Fund and Stronger Country Communities Fund, which saw a combined \$63.7 million committed to projects ranging from support for development of the Bomen Enterprise Area to a number of significant community and recreational facility upgrades.

Grant category	Approved funding
Community	\$34.83 million
Economic	\$67.78 million
Disaster recovery	\$2.70 million

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



Figure 8: Rainstorm over a canola field in Coolamon LGA. Photo credit: Michael Fairlie.

7. Eastern Riverina 2023 economic snapshot

The Eastern Riverina’s population continues to grow, with the growth rate expected to accelerate over the long term given the region’s demographic profile

Although the region has seen population growth slow since 2016, this trend is expected to reverse in the near future. There is a need to focus on developing social infrastructure to support attraction and retention of people in the primary working age cohort. This need is compounded by the population and workforce influx associated with major projects such as the Wagga Wagga SAP.

Population growth

The region saw an average population growth of rate of 1.1% between 2016-2021, equalling about 850 new residents per year (see Figure 9). However, the 2019 to 2021 period saw growth dip slightly, suggesting that COVID-19 impacted this growth trend. Despite this, sustained population growth in the region is predicted to continue over the next decade.^[19]

Population growth rates have been varied across the LGAs. Wagga Wagga in particular saw a high growth rate of 1.2% per year between 2016-2021, with Lockhart growing at 1.0% and Coolamon and Junee growing at 0.1% per year.

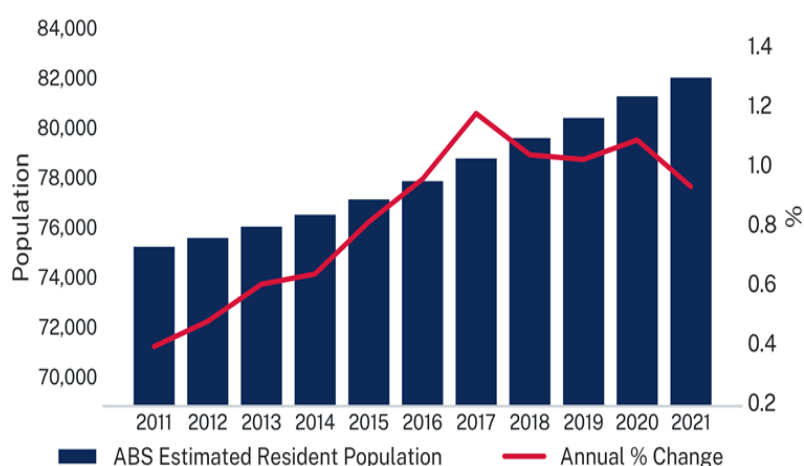


Figure 9: Eastern Riverina FER population growth, 2011-2021 (ABS ERP, July 2022).

Demographic profile

Relative to other regional areas, the Eastern Riverina region has a smaller ageing cohort within its demographic profile. The region has a median age of 37, below the NSW benchmark of 38. This is driven by a higher proportion of the population in the 0-24 years age groups, which could suggest that the region is attractive for young families, but may also be partially explained by key institutions in the region such as the Kapooka defence training base and Charles Sturt University.

However, a smaller prime working age group (25-49) relative to the NSW benchmark suggests younger people move elsewhere for work opportunities. This suggests a need to develop clearer pathways between secondary and tertiary education and local employment opportunities to retain local workers.

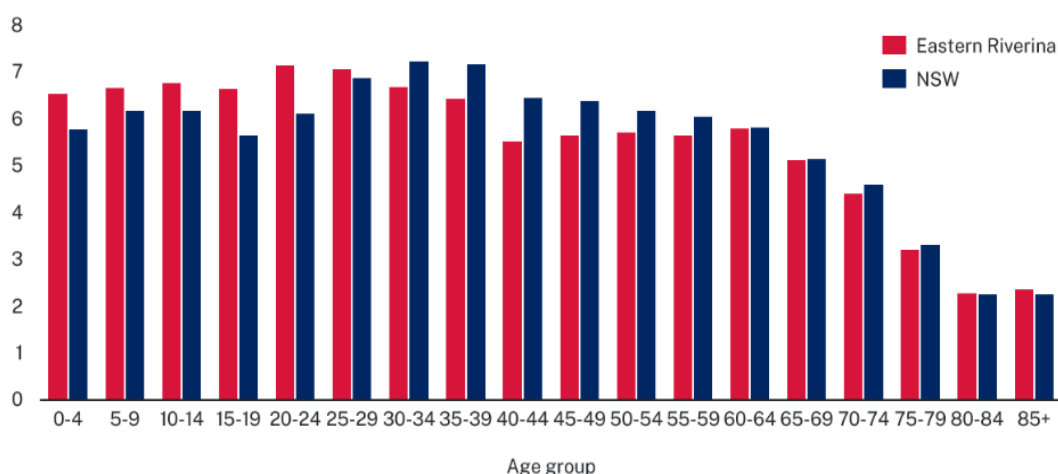


Figure 10: Eastern Riverina FER population by age, 2021 (ABS ERP, July 2022).

Housing supply is struggling to meet increased demand in the Eastern Riverina

The region has faced a decline in housing availability since 2018. This will be an ongoing concern given projected population growth in the region, as well as increased need for tourist accommodation and worker housing demand brought about by major projects including the Wagga Wagga SAP. Ensuring adequate and accessible housing supply will be critical in enabling the delivery and long-term success of these projects.

Housing availability

As shown in Figure 11, residential vacancy rates in the wider Riverina region have fallen from a peak of 3.7% in 2018 to 0.4% in August 2022, with major infrastructure projects including the SAP, solar farm developments, Inland Rail, and the EnergyConnect transmission project placing pressure on housing supply. As with much of regional NSW, this heightened demand has seen growth in house prices.

Meanwhile, outside of peaks in October 2019 and August 2021, residential building approvals in the region have remained stable, with no evident increase in line with increased demand for housing. This indicates that while demand for housing is increasing – and given projected population growth is likely to continue to increase – housing supply is not keeping pace.

Housing affordability

Median house prices in the Eastern Riverina have increased between 30% and 41% between June 2018 and June 2022.^[20] Median house prices in June 2022 were \$330,000 in Lockhart, \$335,000 in Coolamon, \$349,000 in Junee and \$515,000 in Wagga Wagga.^{[20][21]}

The estimated price to income ratio in July 2021 was 4.4 in the Riverina, just over half the NSW average of 8.12.^[22] This suggests that housing affordability is more achievable compared to other regional areas, and with sound employment metrics, points to potential for sustainable growth in the region if housing availability can be improved.

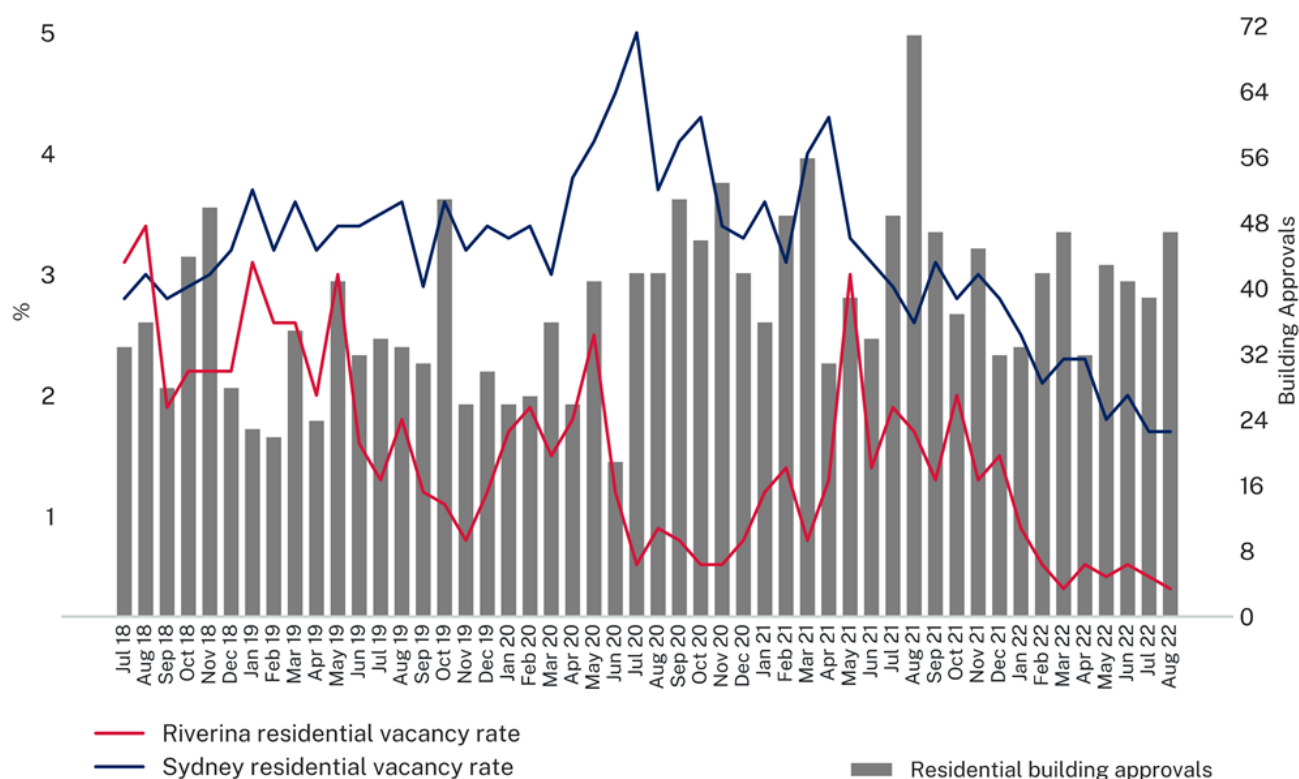


Figure 11: Eastern Riverina FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

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

Unemployment rates remain low in the region while job vacancies continue to increase

A constrained labour market has been a key issue for the Eastern Riverina region as the jobs market makes a recovery from the acute phase of the COVID-19 pandemic, with job vacancies reaching a record high in 2021. The region identified a need to further develop skilled workforce attraction and retention initiatives in the 2018 REDS and a continued focus on this need is required to support the range of major projects and investments both underway and planned.

Employment

As shown in Figure 12, as at June 2022, all the LGAs in the Eastern Riverina had unemployment rates below the NSW benchmark of 3.3% (Wagga Wagga: 2.8%, Junee: 2.6%, Coolamon: 1.6% and Lockhart: 1.5%). After peaking in September 2020, unemployment rates dropped significantly throughout 2021.

As shown in Figure 13, job vacancies in the broader Riverina and Murray region climbed to reach a record 2,472 in August 2022. Medical practitioners and nurses (237 vacancies), administrative roles (182) and carers and aides (184) represent the top 3 occupation vacancies in the region. Other jobs in demand include automotive and engineering trades workers (122) and retail sales roles (131).

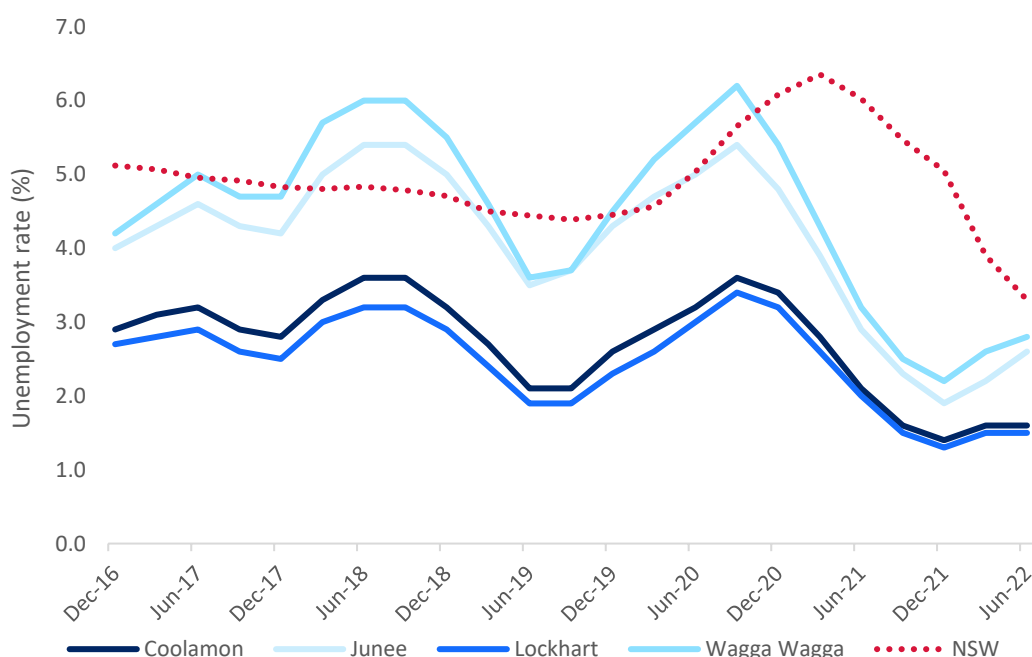


Figure 12: Eastern Riverina FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).

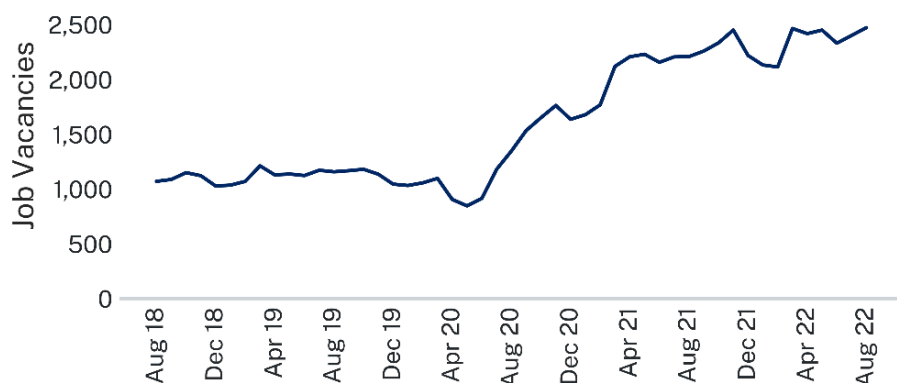


Figure 13: Job vacancies, Riverina Murray region (2018-2022) (Regional IVI, National Skills Commission, 2022).

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

Aboriginal employment

The Aboriginal unemployment rate in the Eastern Riverina was 9.8% in 2021, matching the NSW Aboriginal unemployment rate. This represented a decrease from the 14.4% rate recorded in the region in 2016 but remains significantly higher than the NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Eastern Riverina	2011	16.8%
	2016	14.4%
	2021	9.8%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census, 2021.



Figure 14: Yerong Creek Water Tower Mural, Lockhart LGA. Photo credit: Lockhart Shire Council

Eastern Riverina region 2023 engine and emerging industries

The Eastern Riverina region has a \$5.8 billion economy. In spite of significant shocks since 2018 including drought, floods and the COVID-19 pandemic, the Eastern Riverina region's engine industries have remained maintained consistent growth. The strength of each industry is measured using location quotient (LQ) analysis¹ as displayed in Figure 15, where industry size correlates with bubble size.

Engine industries

The Eastern Riverina's engine industries have remained consistent since the 2018 REDS.

Public administration and safety (LQ of 3.16) is the Eastern Riverina's largest specialisation, adding \$1.12 billion to GVA in 2020. The specialisation is broad-based, with defence the largest contributor, adding \$782 million to GVA in 2020 (LQ of 9.9), while public safety and order contributed \$102 million in 2020 (LQ of 1.4).

Agriculture (LQ of 2.76) is another engine industry, generating \$311 million in GVA in 2020 and growing by an average of 8.3% per year between 2011 and 2020. This is driven largely by a strong sheep, grains, beef and dairy sector (LQ of 4.7), which generated 86% of the industry's output in 2020. This specialisation also creates value-add opportunities in food product manufacturing specialisations including meat and meat product manufacturing (LQ of 5.4) and oil and fats manufacturing (LQ of 9.9).

The Eastern Riverina's health and education cluster is also an important sector, with **healthcare and social assistance** (\$542m), and **education and training** (\$414m) making large contributions to the region's output. The sectors continue to grow quickly, with 6.1% average annual growth in healthcare and 3.2% in education between 2011 and 2020.

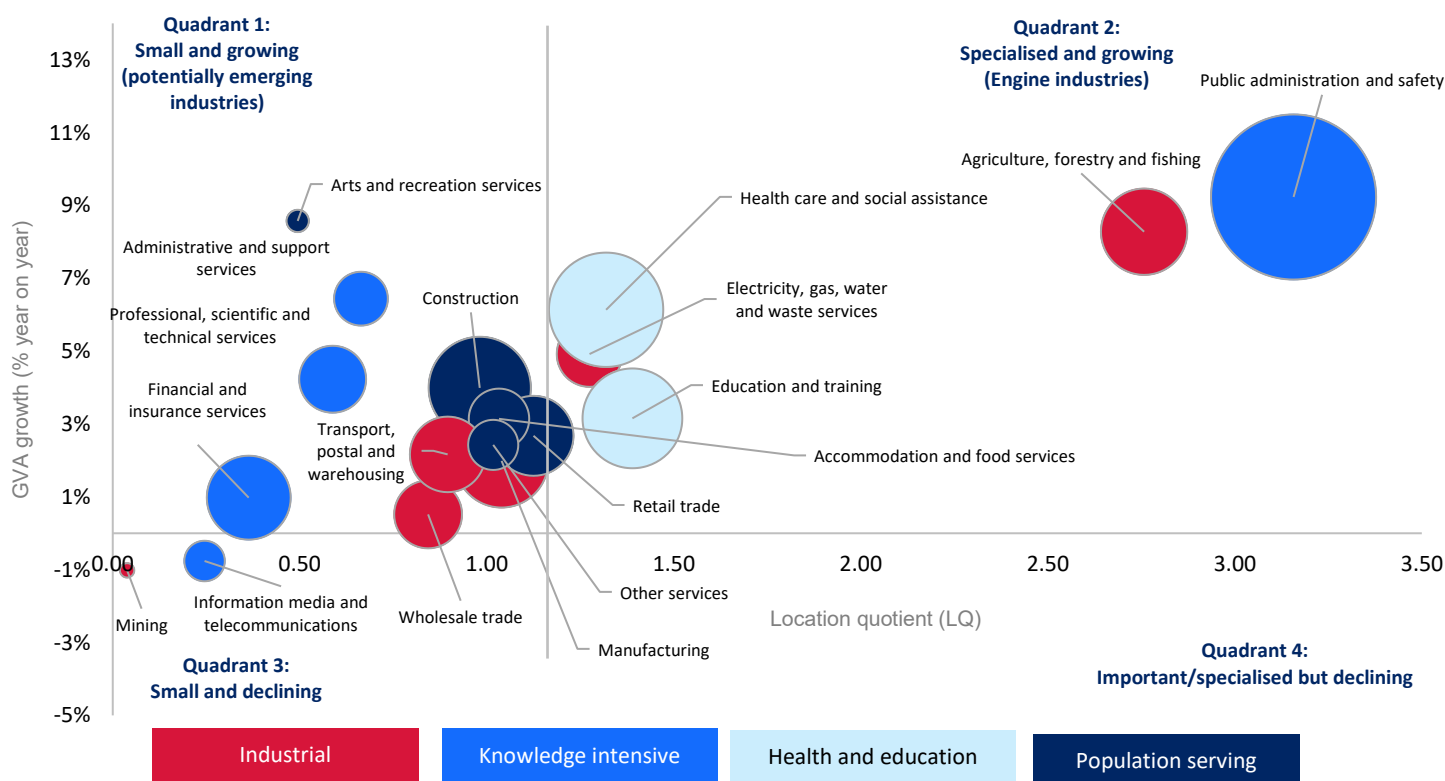


Figure 15: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPAN, 2020).

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

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

Emerging industries

The region's emerging specialisations have evolved significantly since the 2018 REDS.

Arts and recreation services has grown at an average annual rate of 8.6% between 2011 and 2020, which was nearly double the state wide average over the same period. This translates to more than double industry size, highlighting benefit from investment in tourism assets such as the Wagga Wagga Multi-Purpose Stadium, Museum of the Riverina redevelopment, the Greens Gunyah Museum and the Rock Regional Observatory.

Energy generation is also a key emerging industry in the Eastern Riverina. This is facilitated by a specialisation in electricity generation (\$131 million GVA in 2020), with an average annual growth rate of 4.9% since 2011. The growth path for the industry should remain strong given the major transmission network investments, along with the investment attraction the Wagga Wagga SAP will bring to the region, with a localised hydrogen gas network that can enable the creation of new manufacturing based business to access a cheap green hydrogen supply.

Additionally, the Hume Hydrogen Highway currently under development by the NSW and Victorian Governments, will see hydrogen-powered linehaul trucks pass through the broader region. Representing the first leg of a broader east coast hydrogen refuelling network, the Hume Hydrogen Highway presents a key early opportunity for growth in the green hydrogen sector.

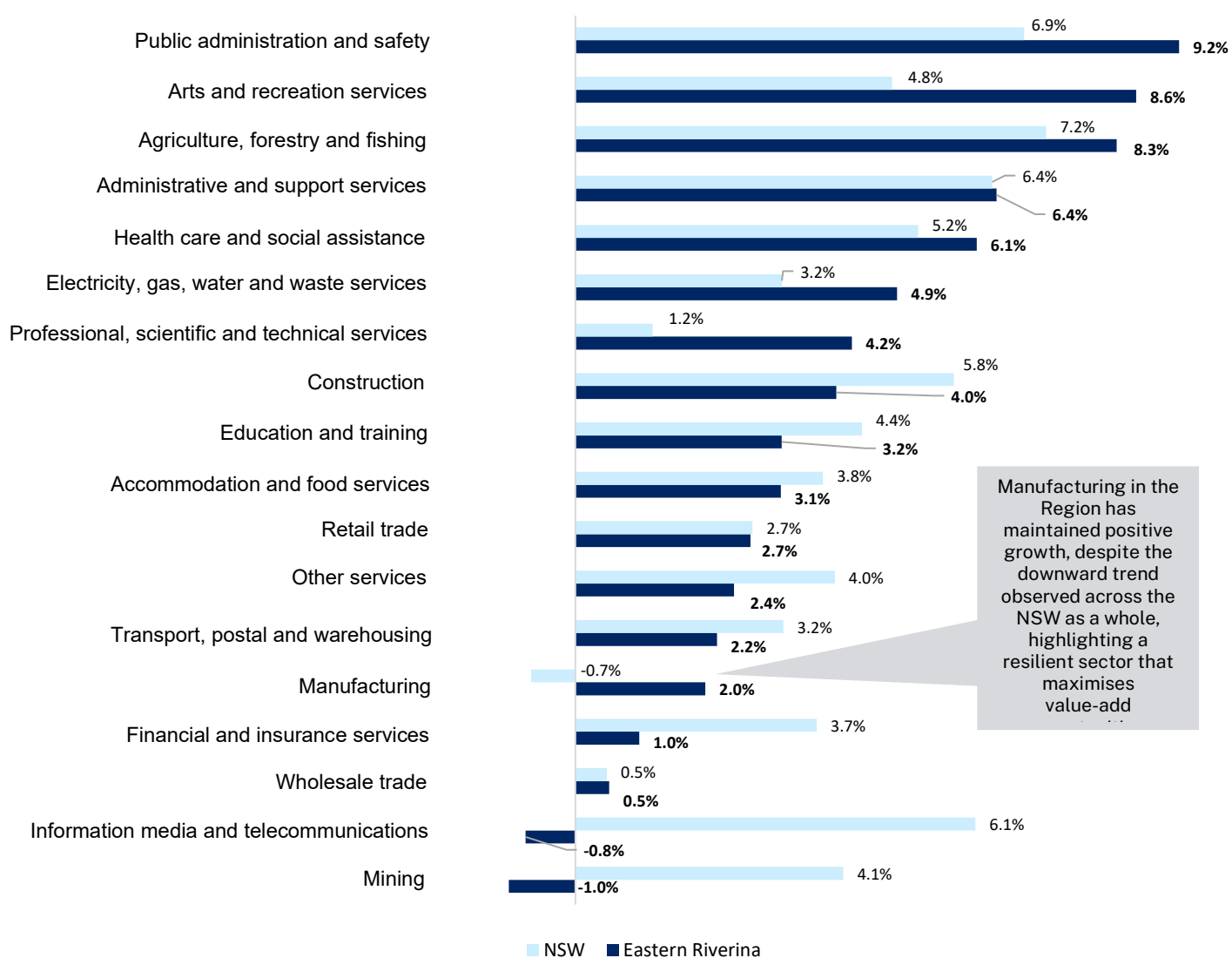


Figure 16: Change in GVA by Industry (%YOY), 2011-2020 (REMPAN, 2020).

Eastern Riverina region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning the Eastern Riverina's economy and regional competitiveness (see page 11). Despite recent shocks impacting many endowments, consultation affirmed that most of them remain valid, with endowments including:

- Location - access to strategic transport routes
- Transport and logistics infrastructure
- Liveability and lifestyle appeal
- Natural resource endowment
- Public sector administration facilities
- Healthcare infrastructure and services
- Education infrastructure
- Wagga Wagga Airport
- Local institutions and strong leadership.

New endowments

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

+	Humelink and EnergyConnect transmission network projects	The Humelink transmission line will unlock a more reliable and sustainable energy supply, and Project EnergyConnect will deliver a new interconnector between NSW and South Australia, delivering increased energy security and enabling greater connection of renewable energy generation into the grid.
+	Wagga Wagga SAP	The Wagga Wagga SAP will attract significant investment into the region's high value agricultural and manufacturing output.
+	Inland Rail	Increased capacity facilitated by the new freight line will expand the region's transport and logistics specialisation.
+	Renewable energy generation	Renewable energy projects in the region will provide additional energy sources in the Eastern Riverina region that can support industries in the shift towards net zero.

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

Opportunities and vulnerabilities in engine and emerging industries

Public administration and safety

Long held strengths in the public sector administration and safety (in particular driven by the large defence presence in the region) presents an ongoing opportunity for growth for the region.

Gross Value Added (GVA) (2020, \$m)	1,222
Employment (2021)	3,808
Location Quotient (LQ) score (2020)	3.16
LQ defence (2020)	9.9
LQ public order and safety (2020)	1.9

Strengths

- The Eastern Riverina region has maintained its specialisation in public administration and safety, growing at average annual rate of 9.8% between 2011 and 2020.
- This is driven by specialisation in defence, with the region having multiple built industry endowments including the Royal Australian Air Force Base Wagga, the National Aerospace Training Centre and the Blamey Barracks Base at Kapooka.
- A strong culture of public order and safety as a major industry also exists across the region, which is home to the Junee Correctional Facility that has also received a \$200 million upgrade.

Vulnerabilities

- The strong increase in defence spending over the past decade has increased potential supply chain pressures as demand for skills across projects grows, which are being amplified in an environment in which inflation is putting pressure on production costs.

Opportunities

- Funding for the Department of Defence and Australian Signals Directorate has increased to 2.11% of Gross Domestic Product (GDP) based on the 2022-23 Commonwealth Budget, reflecting ten straight years of real growth in defence expenditure, and ongoing growth in the sector is expected.^[23]
- There is opportunity for the region to leverage its defence assets to attract further investment and boost capability and skills development in the region, given major projects like the RAAF Base Wagga Redevelopment and Kapooka Military Area Redevelopment.^[24]
- It is anticipated there will be almost \$1 billion in future defence project spending over the next five years that will significantly bolster the sector's growth in the region.

Agriculture and food product manufacturing

Long held strengths in agriculture and food manufacturing industries continue to deliver sustained growth, leveraging the region's well established transport links to efficiently get outputs to market.

GVA (2020, \$m) ^a	453
Employment (2021) ^b	3,735
LQ score (2020)	2.76
LQ sheep, grain, beef and dairy (2020)	4.7
LQ meat and meat product manufacturing (2020)	5.4

^a GVA calculation includes Sheep, grains, beef and dairy cattle, Agricultural, forestry and fishing support services, Poultry and other livestock, Meat and meat product manufacturing, Dairy product manufacturing, Fruit & vegetable product manufacturing, Oils and fats manufacturing and Other food product manufacturing.

^b Summation of ANZSIC 1-digit Agriculture, forestry and fishing and ANZSIC 2-digit Food product manufacturing.

Strengths

- Key natural endowments in the Eastern Riverina region include a good supply of prime agricultural land and good solar resources, which creates high quality conditions for agriculture.
- The region is home to major transport and logistics hubs that link the region to domestic and international markets, a key advantage that will be enhanced by Inland Rail and the Wagga SAP.
- There are strong linkages between the agriculture sector and value-add food product manufacturing, with a key specialisation in the region being meat and meat product manufacturing (LQ of 5.4).
- The region benefits from the presence of a number of agricultural research facilities and organisations including AgriFutures, the Charles Sturt University AgriPark, NSW DPI Advanced Gene Technology Centre and the Southern NSW Drought Resilience Adoption and Innovation Hub.

Vulnerabilities

- Externalities have impacted the industry since 2018, as demonstrated by multiple environmental shocks including drought, the mouse plague, floods and the impacts of COVID-19.
- Supply shortages and inflationary pressures have increased key input costs such as production and freight transport costs (estimated 4.7% increase in 2021-22).^[25] Freight costs represent a significant share of Gross Value of Farm Production, with grains (27.4%) and beef (6.4%) high-cost sectors.^[26]
- Digital connectivity blackspots are a major constraint to the uptake of agtech in the region.

Opportunities

- Significant investment into the Wagga SAP, Lockhart Industrial Park and the Coolamon Industrial Estate can support capital investment and operation expansion in the food manufacturing sector.
- Increased uptake of agtech presents a key opportunity for the region, leveraging the research capability of key institutions to drive productivity growth and increase yield.
- Given Wagga Wagga's increasing role as a key transport and logistics hub, significant opportunities may arise to further enhance links between the agriculture and food manufacturing sectors, with a focus on maximising value add to primary production before it leaves the region.
- Ongoing improvements to freight connectivity can enable sustained future growth, via both major investments such as Inland Rail, but also complimentary investments such as enhancement projects for key railway lines and an ongoing focus on key freight road upgrades.

Tourism

The Eastern Riverina region has been able to leverage its significant natural endowments and built environment to continue to grow the visitor economy. Future industry growth will be contingent upon enhancing resilience against external shocks and diversifying the visitor economy in the region.

Visitor spend (2021, \$m) ^[14]	275
Employment (2021) ^a	6,444
LQ score (2020) ^b	1.03
LQ sports and recreation (2020)	0.9
LQ accommodation (2020)	1.2

^a Summation of ANZSIC 1 digit Retail trade, Accommodation and food services, Arts and recreation services.

^b LQ score is for the Accommodation and food services industry.

Strengths

- The region has a wide range of visitor attractions including the Wagga Wagga Multi-Purpose Stadium, Multi-Sport Cycling Complex, the Museum of the Riverina, the Junee Licorice and Chocolate Factory, the Coolamon Cheese Factory, Lockhart Water Tower Mural and Farm Art Sculpture Trail, the Rock Regional Observatory and the Murrumbidgee Riverside redevelopment in Wagga Wagga.
- The Eastern Riverina also has a developing cultural tourism offering which includes the Rock Nature Reserve - Kengal Aboriginal Place and the Spirit of the Land Festival in Lockhart.
- There is a strong events itinerary with large annual festivals in the region such as Gears and Beers, Wagga Gold Cup, Fusion Multicultural Festival and Festival of W. The Kapooka March Out from Kapooka Barracks occurs weekly, and this also attracts recruit families to the region.

Vulnerabilities

- The region's tourism industry is vulnerable to external shocks, as evidenced over recent years where the visitor economy has been hard hit by drought, COVID-19 and floods. 2021 visitor numbers were down by 236,000 on 2019 levels, with spend dropping by \$87 million.^[14]
- Limited visitor accommodation availability may constrain the region's ability to attract major events.

Opportunities

- Robust services infrastructure and a diverse visitor economy product can assist in increasing high-value, multi-day recreational travel, as opposed to visits focused around business travel and visiting friends and relatives.
- Ongoing upgrades and re-development of Wagga Wagga Airport can aid improved physical accessibility to the region for tourists, and open up new potential markets.
- Given investment in sporting infrastructure, there is an opportunity for the region to attract more sports tourism including large community sport carnivals and destination sporting events such as National Rugby League, AFL and A-League matches.
- Encouraging new investment into nature-based and agritourism experiences, as well as an ongoing focus on attracting major events can help the region to further diversify its visitor economy offering.
- Increased collaboration between LGAs to deliver coordinated visitor experiences and shared activities, such as the successful Canola Trail initiative can help ensure the benefits of growth in the visitor economy are shared across the region.

Energy supply (including renewables)

The Eastern Riverina region has been able to leverage its significant natural endowments to grow the energy supply industry, and future growth will be supported by major transmission projects in the region.

GVA (2020, \$m)	181
Employment (2021) ^a	465
LQ score (2020)	1.27
LQ electricity distribution (2020)	1.6

^a ANZSIC 1 digit Electricity, gas, water and waste services.

Strengths

- The Eastern Riverina region has high quality land and solar resources that are well placed to support investment in renewable energy projects.
- The Transgrid Humelink and Project EnergyConnect transmission projects will both run through the region, with the combined investment expected to total more than \$5 billion. These projects will significantly increase the capacity of the electricity network across Southern NSW to support increased renewable energy generation.

Vulnerabilities

- Energy infrastructure often requires a significant amount of land, which can compete with agricultural, commercial, industrial and residential demand.
- The impacts that major energy projects can have on local services and infrastructure need to be considered during project planning, so to ensure long term benefits flow to the community post the construction phase.
- The major transmission projects will significantly increase demand for housing to accommodate workers in the region, which may add to current challenges being faced associated with low housing availability and decreasing affordability.

Opportunities

- The Humelink Transmission Line and Project EnergyConnect will strengthen the region's locational advantages associated with energy generation and supply.
- The transmission projects will create a key comparative advantage to attract businesses to the region, as they will significantly enhance access to a secure energy supply.
- Provision of targeted training and partnerships between educational institutions, training organisations and the energy industry present an opportunity for local workforce and skills development to meet local industry needs. This can help maximise the long term benefits local communities receive from these major investments.
- There are a number of significant proposed solar facilities in the region currently in various planning approval stages.

Key themes in stakeholder consultation

The Eastern Riverina region, with the regional city of Wagga Wagga at its heart is growing strongly as a result of positive investment trends, population shifts and industry opportunities. The Inland Rail supported by the SAP, visitor economy growth, good agricultural conditions and investments are all in energy driving local demand and growth.

Stakeholders outlined that current housing market challenges and workforce and skills shortages are major constraints to growth, with the need to develop a long term pipeline of appropriately zoned land to cater for projected future population growth. Local councils are working hard to facilitate current investment interest and projects.

Housing availability and affordability

In line with the 2023 REDS Update housing market analysis (see Page 21), consultation revealed concerns amongst stakeholders that current shortages and unaffordability will only worsen in the face of a growing population and a need to house workers associated with major project delivery.

Workforce constraints

While consultation participants acknowledged the economic opportunities provided by investments in major infrastructure and precinct based developments, this has placed significant pressures on demand for labour across sectors, especially in the industrial cluster (trades) and health and education cluster (health professionals and educators) (page 22).

Growing the visitor economy

Recent natural disasters, alongside the impacts of the COVID-19 pandemic on consumer spending and tourism visitation, have brought into focus the need to grow and diversify the region's visitor economy, target high value tourism markets, and support ongoing visitation of friends and relatives, business travellers and healthcare specialists.

Eastern Riverina REDS – 2023 Update strategies

Regional stakeholders noted the 2018 strategies broadly remain relevant to the Eastern Riverina region and expressed a desire to retain these, but with some amendments made to:

- reflect the key need to attract and retain people to bolster the region's workforce;
- create a focus on maximising regional amenity and the delivery of community infrastructure as part of the strategy centred on supporting expansion of the visitor economy; and
- to shift the focus on improving utilities, energy and telecommunications from the strategies to instead be reflected within the underlying enabling actions.

Reflecting the changes outlined above, the 2023 Update strategies for Eastern Riverina are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Existing	Leverage the region's strategic location by developing transport and logistics and manufacturing sectors.
Existing	Support and grow agribusiness.
Existing	Support the expansion and growth of the healthcare and social assistance sector.

Amended	Attract, retain and upskill the workforce and drive innovation and entrepreneurialism.
Amended	Maximise regional amenity and community infrastructure to expand the visitor economy.

Key enablers of economic growth

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

Strategy	New enablers		Lead and support	Rationale
Leverage the region's strategic location by developing the transport and logistics and manufacturing sectors.	Government and regulation	Support councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and prioritise locations for upgrades to telecommunications infrastructure, including but not limited to industrial estates.	NSW Telco Authority, Local councils, Department of Regional NSW (DRNSW).	Reliable and fast digital connectivity will play a crucial role in transport and logistics productivity gains.
Support and grow agribusiness.	Infrastructure	Encourage agricultural businesses to enhance their production by enabling the uptake of ag tech.	Department of Primary Industries (DPI), Local councils, Local Agriculture Bureau, Regional Development Australia (RDA) Riverina, Charles Sturt University (CSU) Agri Park.	Improve productivity and access to ag tech in the region.

Strategy	New enablers		Lead and support	Rationale
	Infrastructure	Prioritise the agglomeration and attraction of advanced manufacturing, warehousing and processing at strategic locations.	Local councils, Wagga Wagga Agricultural Institute, RDA Riverina.	Capitalise on the region's manufacturing capabilities to add value to the agricultural sector.
Support the expansion and growth of the healthcare and social assistance sector.	People and skills	Enhance the capacity of healthcare and other care economy sectors by collaborating with Murrumbidgee Local Health District (LHD) to support the delivery of an integrated regional healthcare model and health worker accommodation.	DRNSW, Local councils, NSW Health, Business NSW, Calvary Hospital.	Ensure sustainability of growth through having adequate resources in enabling services in health and education cluster.
	People and skills	Collaborate with industry and training bodies to prioritise training opportunities for medical professionals, early childhood care workers and aged care workers.	Training Services NSW, DRNSW, TAFE NSW, Local councils, Registered Training Organisations (RTOs).	
Attract, retain and upskill the workforce and drive innovation and entrepreneurialism.	People and skills	Develop a workforce strategy focused on developing insights and actionable strategies for attracting and retaining young workers and students.	Training Services NSW, Local councils, Office of Regional Youth, Business NSW, Chamber of Commerce, RDA Riverina	Improve pipeline of industry ready skills to fill demand for labour across the region.

Strategy	New enablers		Lead and support	Rationale
	People and skills	Engage with businesses and education providers to ensure education and training programs support the development of an appropriately skilled local workforce to meet the future needs of the region, including the Wagga Wagga SAP.	Training Services NSW, DRNSW, TAFE NSW, Local councils, RTOs.	Leveraging major projects for sustainable economic growth is a key regional priority.
Maximise regional amenity and community infrastructure to expand the visitor economy.	Infrastructure	Support a diverse visitor economy by encouraging the development of new tourism experiences, including major events attraction and identify opportunities to support existing and potential private sector investment in visitor accommodation.	Local Councils, Destination Riverina Murray, National Parks and Wildlife Services, Destination NSW.	Promoting a friendly and engaged visitor economy that enables sustainable growth.
		Upgrade enabling infrastructure and support recycling and circular economy initiatives to meet growing demand from future population increases.	Local Councils, NSW Department of Planning and Environment (DPE).	Provision of sustainable infrastructure to enable population growth.
		Identify opportunities to support the diversification of the region's affordable housing options and increase housing supply through a Regional Housing Delivery Plan.	DRNSW, local councils, DPE.	Ensuring affordable and sufficient housing for all members of the community.

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Figure 17: Women enjoying a day of cycling along the Wiradjuri Trail, Wagga Wagga. Photo credit: Chloe Smith Photography.