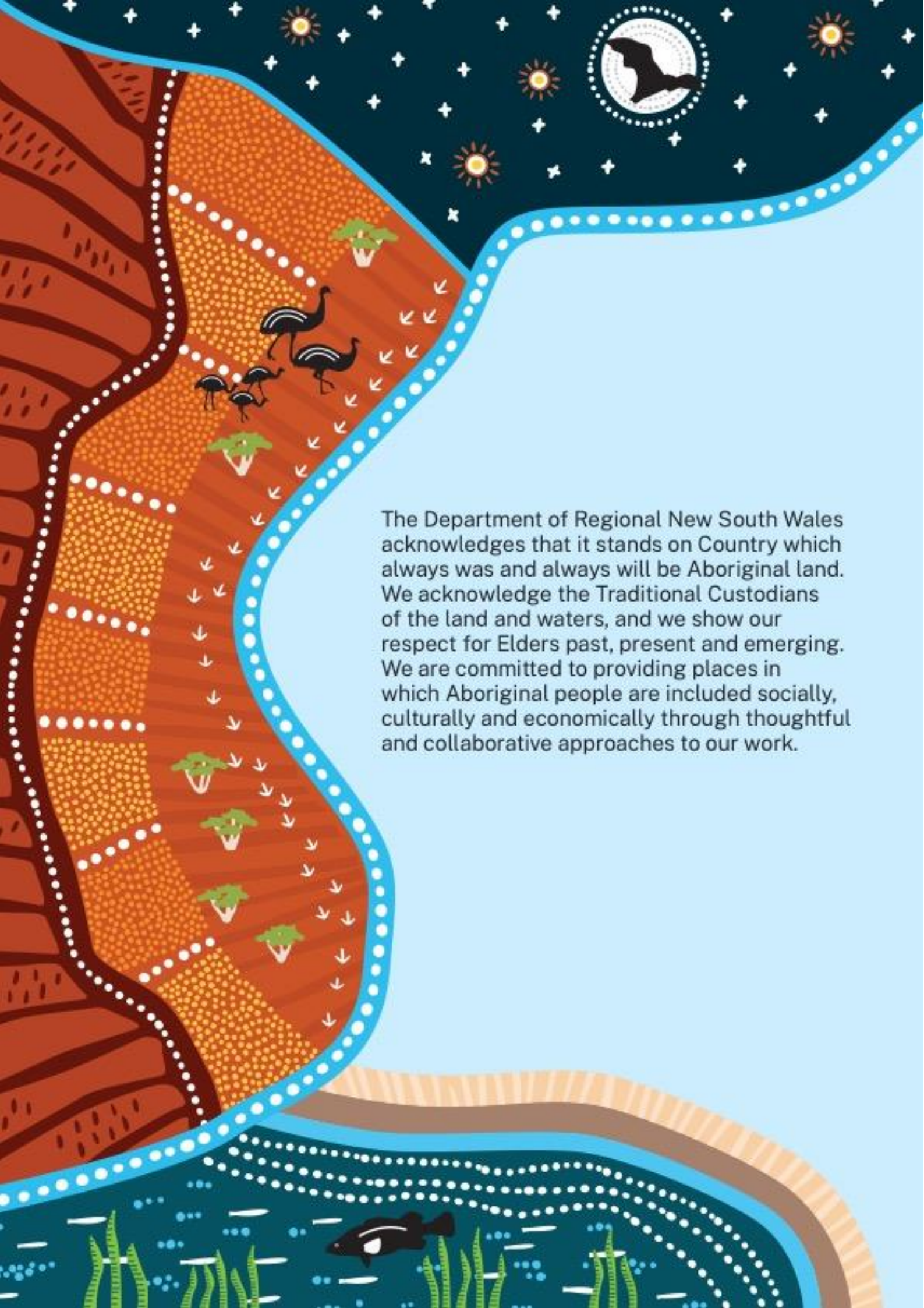


Western Plains Regional Economic Development Strategy – 2023 Update





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 Western Plains region to the development of the 2023 REDS Update, with particular thanks to staff from Bogan, Bourke, Brewarrina, Cobar, Coonamble, Walgett and Warren councils. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS Update project.

On Country – Artwork by Mumbulla Creative

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

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

Cover image: Cobar Miners Heritage Park. Photo credit: Cobar Shire Council

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Table of contents

Table of contents	4
1. Executive Summary	5
Changes in the Western Plains region since 2018	5
2. About the 2023 REDS Update	8
3. About the Western Plains region	9
4. The 2018 Western Plains REDS	10
5. The big picture: Shocks and trends impacting the Western Plains region since 2018	12
Significant events impacting major industries.....	12
Macroeconomic trends shaping the region's future	14
6. Responding to change: Initiatives and investments since 2018	16
Significant investments since 2018	17
7. Western Plains 2023 economic snapshot	21
Demographics	21
Housing.....	22
Employment	23
Western Plains region 2023 engine and emerging industries	25
Western Plains region 2023 endowments.....	27
8. Looking ahead: Strategic opportunities for growth, resilience and liveability	28
Opportunities and vulnerabilities in engine and emerging industries	28
Key themes in stakeholder consultation.....	32
Updated 2023 REDS strategies.....	32
Key enablers of economic growth	33
9. References	35

1. Executive Summary

Changes in the Western Plains 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 Western Plains region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



Over **\$60 million** committed to **water security projects** in Bourke, Cobar, Hermidale and Nyngan.



Investment in the **Bourke Goat Abattoir** to the sum of **\$60 million**.



More than **\$96 million** invested to deliver **major road upgrades** across the region.



A range of **tourism projects** across the region totalling more than **\$55 million**.

The Western Plains region has experienced reducing housing vacancy rates, increasing house prices and significant growth in job vacancies



A 6.6% decline in the region's population since 2018.



Vacancy rates were 1.5% as at August 2022, with **median house prices** ranging between **\$135,000 and \$165,000** across the region.



The proportion of the **population over 55 years** has **increased by 2.1%** since 2018.



There has been a sustained increase in unemployment since the start of the COVID-19 pandemic, despite **job vacancies climbing to a record 1,773** in November 2021.

The Western Plains' key industries (agriculture, mining, tourism and energy supply) have remained resilient, with agriculture a key driver of economic growth



Agriculture

+ 5.5 % Year-on-Year (YoY) growth from 2011-2020	\$ 330 million Gross Value Added (GVA) in 2020	1,990 jobs supported in 2021
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Mining

- 2.2 % YoY growth from 2011-2020	\$ 487 million GVA in 2020	801 jobs supported in 2021
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Tourism

+ 1.6 % YoY growth from 2011-2020	\$88 million visitor spend in 2021	1,083 jobs supported in 2021
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Energy supply (including renewables)

+ 0.8 % YoY growth from 2011-2020	\$44 million GVA in 2020	112 jobs supported in 2021
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Key themes from local consultation

Stakeholders from the Western Plains region have highlighted enabling growth through service and infrastructure provision and enhancing regional resilience as key priorities for the region.

Housing availability



Stakeholders highlighted concerns about the current shortage of available housing in the region, and the likelihood that it will only worsen in the face of potential future population growth and the need to house workers associated with major projects.

Skills shortage



Workforce and skills shortages in the region, compounded by a lack of migrant workers has put pressure on demand for labour across most parts of the economy, especially in key population serving sectors such as health, education, and childcare.

Building resilience and water security



Stakeholders highlighted that recent climate events and broader shocks have highlighted the need to incorporate principles of resilience into planning for growth, with a key focus on the region being enhancing water and energy security.

Western Plains REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Improve the region’s liveability, access to services and housing availability to enable population and skills growth and enhance community wellbeing.</p>	<ul style="list-style-type: none"> • Deliver a Regional Housing Delivery Plan to understand current and future housing needs, barriers to supply and identify recommended actions to overcome these. • Collaborate with local councils in the delivery and improvement of water infrastructure across the region to meet future town water supply needs, particularly in times of drought and/or growth.
<p>Drive growth in agriculture, value-add manufacturing and transport through investments in market access and enhancing digital connectivity.</p>	<ul style="list-style-type: none"> • Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure, and support delivery agencies to embed minimum connectivity standards into infrastructure programs. • Work with local councils to improve transport infrastructure to support connectivity and freight movement, including improvements to the road network and maintaining ongoing air connectivity across the region through airstrip maintenance and improvement.
<p>Optimise economic activity in agriculture and mining by increasing climate and economic resilience as well as energy and water security.</p>	<ul style="list-style-type: none"> • Implement recommendations from the Western Regional Water Strategy and Macquarie Regional Water Strategy to improve water security for community, industry and the environment, , including through the delivery of the Nyngan to Cobar pipeline. • Investigate near and medium term energy infrastructure requirements to support growth in engine industries, including agriculture and mining, and to support emerging opportunities in the broader region.
<p>Grow tourism to enrich and diversify the region's visitor economy with further investments in tourism infrastructure and transport accessibility.</p>	<ul style="list-style-type: none"> • Support ongoing investment in visitor attractions and experiences, with particular focus on Aboriginal culture and nature-based experiences, and improve tourist access by upgrading roads to provide sealed tourist drive routes.
<p>Improve access to health care, aged care, education, and childcare to attract and retain working age people and families.</p>	<ul style="list-style-type: none"> • Develop a workforce strategy focused on developing insights and actionable strategies to improve the attraction, training and retention of a skilled workforce.

2. About the 2023 REDS Update

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

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

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

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

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



Figure 1: A worker descends a mine shaft in Walgett LGA. Photo credit: Walgett Shire Council.



Figure 2: Coonamble township and silos. Photo credit: Coonamble Shire Council.

3.About the Western Plains region

The Western Plains FER is situated in the northern inland region of NSW, covering more than 20% of the area of New South Wales. The region is comprised of the seven Local Government Areas (LGAs) of Bourke, Bogan, Brewarrina, Cobar, Coonamble, Walgett and Warren LGAs.

The most significant population centres across the region include Bourke, Brewarrina, Cobar, Collarenebri, Coonamble, Lightning Ridge, Nyngan, Walgett and Warren. The Barwon, Darling and Macquarie rivers are key natural endowments across the region.

Total area covered (km2)	162,655
Population (2021)	22,494
Bogan	2,481
Bourke	2,417
Brewarrina	1,488
Cobar	4,098
Coonamble	3,834
Walgett	5,590
Warren	2,586
Size of the economy (2020)	\$1.698 billion
Total employment (2021)	8,407

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

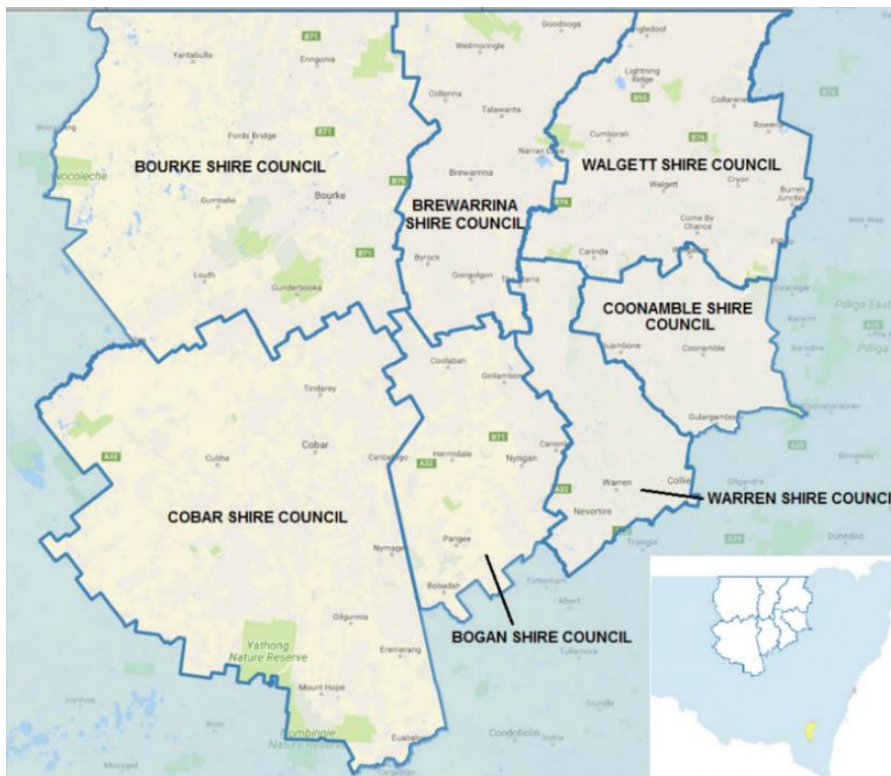







Figure 3: Map of the Western Plains Functional Economic Region.

4. The 2018 Western Plains REDS




In the 2018 REDS, the region was actively pursuing growth of its key industry specialisations of agriculture, mining and tourism. Endowments recognised in the document spanned natural, social and institutional assets, many of which are central to facilitating economic development in the region.

2018 Western Plains strategies

	<p>Drive growth in agriculture and manufacturing of agricultural products by optimising access to markets and consumers through investment facilitation.</p>
	<p>Optimise economic activity across agriculture, mining and tourism industries by enhancing telecommunications and climate infrastructure that increases business certainty and resilience.</p>
	<p>Unlock growth in agriculture, transport, manufacturing of agricultural products and mining by improving energy and water infrastructure.</p>
	<p>Grow tourism to enrich and diversify the regional economy.</p>
	<p>Improve the region's social and demographic fabric to grow mining, tourism and agriculture industries.</p>














2018 Western Plains specialisations

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

	<p>Agriculture, forestry and fishing</p>
	<p>Mining</p>
	<p>Tourism</p>

2018 Western Plains endowments

Western Plains is home to a wealth of physical, institutional, built and human endowments. These endowments play a key role in helping to enable growth in the region's key industries.

Endowment	Relevant 2018 specialisation
Darling River Basin, Macquarie River and Barwon River systems	
The Great Artesian Basin	
Wide variety of soil types	
Natural biomass	
Inland rail	
Creative community	
Unique landscapes (Macquarie Marshes, national parks)	
Aboriginal heritage (Kamilaroi constellations, Brewarrina Fish Traps and scar trees)	
Historical significance (Freedom Riders in Walgett, Banjo Patterson and Henry Lawson literature)	
Non-ferrous ore	
Precious stone deposits	
Hot, semi-arid climate (favourable for solar energy generation)	
Institutional endowments (councils and business groups)	

5. The big picture: Shocks and trends impacting the Western Plains region since 2018



Figure 4: Brewarrina Fish Traps. Photo credit: Destination NSW.

Significant events impacting major industries

A period of sustained drought from 2017 to 2020 had severe environmental, social and economic implications for the region. The COVID-19 pandemic further challenged the region as it recovered with local businesses impacted, particularly those in the visitor economy that were significantly restricted by movement and operating restrictions. For the period from 2018 to 2022 the region had ten disaster declarations^[1] and received \$19.15 million in disaster recovery grants.^[2] Recovering from these events and developing both industry and community resilience continues to be a key priority.

Drought

The Western Plains experienced severe drought between 2017 and 2020, with the worst conditions from late 2018 until 2020.^[3] In many parts of the region, these drought conditions followed almost a decade of below average rainfall.^[4]

No significant natural inflows into the Barwon-Darling were recorded for more than a year during this period, with the longest cease to flow period on record at Walgett.^[3] Meanwhile the Macquarie Valley reached Stage 3 – severe drought

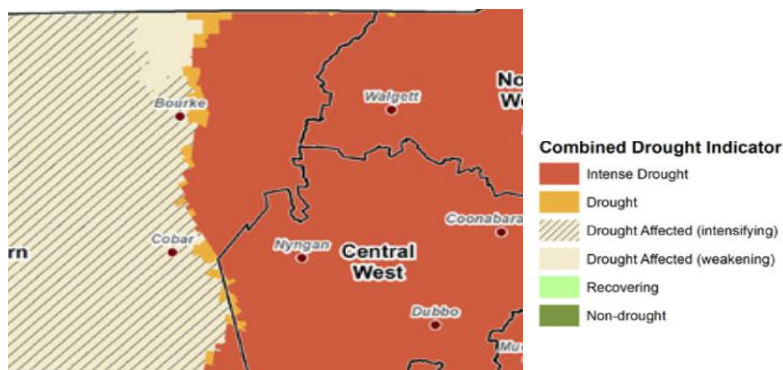


Figure 5. Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

conditions in October 2018, with significant usage restrictions in place for both residential and agricultural use that lasted until mid-2020.^[5]

The drought severely impacted economic activity in the region, with some estimates suggesting Gross Regional Product was reduced by almost 9% per annum during the most intense stage of the drought in 2018 and 2019.^[6] Beyond direct impacts on agriculture, there were substantial flow on impacts across the economy, with upwards pressure on significant input costs for many businesses and substantially lower demand due to reduced incomes.^[7]

Many towns in the Western Plains region experienced substantial pressure on their urban water supplies, with many towns needing to activate emergency supplies such as bores.^[8] The lack of flow in the river systems also caused substantial environmental impacts, including a number of significant fish kill events, along with the death of a substantial number of trees and vegetation.^{[3][5][9]}

COVID-19

Businesses across the Western Plains region felt the impact of the COVID-19 pandemic, with 39% of businesses reporting that COVID-19 negatively affected business.^[10] The significance of the tourism industry as the region's only non-primary production specialisation meant the region was particularly vulnerable to reduced visitation at a time when the region was still recovering from the drought.

Communities also felt the direct impact on their financial wellbeing, with income support recipients rising by 24% and health care card recipients by 17% between March and June 2020.^[11]

Stakeholders have also reported the COVID-19 pandemic has had lasting, significant implications in terms of reducing access to the overseas workforce that the region's agricultural and visitor economy businesses have long valued as a key source of labour supply. Given the region also borders Queensland, the closure of state borders impacted on the flow of goods and people between states.

Mouse Plague

This abundance of mice across NSW caused substantial damage to newly planted and growing crops, destroyed stored grain and hay, and significantly damaged key infrastructure and equipment.^[12] Store owners in the region reported spending six hours a day catching and cleaning up after mice, while some residents were bitten by mice and required treatment.^[13] The plague had a significant impact on community wellbeing, particularly in terms of mental health, given that it disrupted the region's attempts to recover from the preceding drought.

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. There were 3,692 applicants from households and small businesses in the Western Plains region who received a total of \$1.98 million in rebates.^[14]

Floods




In 2021 and 2022, parts of the Western Plains region were impacted by severe weather and flood events. Heavy rainfall in early 2021 across the catchments of the Barwon and Darling Rivers saw minor to moderate flooding occur in parts of the region including Walgett, Brewarrina and Bourke.^[15]

Multiple major flood events occurred in many parts of the Western Plains region in 2022. In the second half of 2022, heavy local rain and large inflows from upstream caused significant flood events in the Macquarie and Bogan Rivers, impacting towns including Warren and Nyngan. The flooding caused road closures and towns to be cut off, while low lying properties and agricultural land were inundated.^[16]

Along the Barwon and Darling Rivers, Brewarrina was completely isolated during parts of October and November 2022, with major flooding on rural properties causing damage to crops and infrastructure, leading to substantial challenges protecting herds and rescuing stranded animals.^[17] Major flooding also cut off Walgett, Collarenebri and Lightning Ridge, requiring airlifts of food, medicine and fodder for animals to residents and properties, with Spring harvesting severely impacted, causing loss of produce and income.^{[18][19]} Further down the Darling River, Bourke Shire experienced major flood levels in late November 2022, as the floodwaters moved down the river system.^[20]

Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate and migration have played a significant role in the development of the Western Plains region since 2018 and are likely to continue to have a strong influence on its future. With a growing population of remote workers, the impacts of successive natural disasters, and renewable energy ambitions in the progression to net zero, the region faces both opportunities and risks in building resilience and leveraging competitive advantage.

Trend		Opportunities and risks
 <p>Digital transformation</p>	<p>The recent COVID-19 pandemic has accelerated the digital economy in Australia, with increased uptake of remote working arrangements as well as online services such as education and telehealth.^[21]</p> <p>As industries diversify and innovate, the need for reliable and efficient telecommunications infrastructure to support growth and to secure and retain a skilled workforce will be crucial.</p> <p>Recent investment in improved infrastructure includes new mobile towers in Coonamble and Walgett Shires, but additional investment is needed to fully enable the digital potential of the region.</p>	<p>Opportunities exist to enhance innovation and support engine industries through the uptake of new technology, including agtech.</p> <p>The digital economy also provides opportunities for small to medium businesses to access larger markets via online channels.</p>
 <p>Changing migration patterns</p>	<p>As a result of the pandemic, many regional areas saw an influx of internal migration from city-dwellers seeking a lifestyle change as a result of the COVID-19 pandemic. Regional NSW gained an additional 26,800 residents while Sydney declined by 5,200 from 2020-2021.^[22]</p> <p>However, the Western Plains has not experienced this influx on a significant scale. Rather, local skills shortages have contributed to growth in fly-in/fly-out and drive-in/drive-out workers, which can have negative impacts for the local economy as these workers do not contribute to population based economic growth.</p>	<p>Investing in workforce capacity and capability enablers, such as housing and training infrastructure, may aid the region to help grow the local labour supply.</p> <p>Investment into infrastructure and facilities that enhance liveability across the region can assist with skilled worker attraction and retention.</p>
 <p>Towards net zero</p>	<p>The Western Plains region can play a significant role in achieving the state's net zero targets given it has the capacity and potential appetite for significant investment into renewables.</p> <p>Agriculture and mining are large and energy intensive industries that can benefit significantly from low-cost local renewable energy that could include solar, wind, biomass, and thermal related generation sources.</p> <p>To take advantage of these opportunities, there is likely to be a complimentary need to upgrade electricity transmission infrastructure.</p>	<p>Opportunities exist associated with investment into renewable energy projects, but challenges lie in securing long-term benefits for the community.</p> <p>Energy intensive industries can benefit from low-cost</p>


Trend	Opportunities and risks	
	<p>There is also a growing market and opportunity associated with carbon credits using local agricultural land, which can help grow and diversify income streams for primary producers.</p>	<p>renewables through enhanced energy security.</p>
 <p>Rising uncertainty</p>	<p>The region has seen a succession of extreme climate events since 2018, including drought, a mouse plague and flooding. Climate events have had a significant impact on local businesses and industries, in particular agriculture.</p> <p>With the frequency and intensity of these events projected to increase in coming decades, there is a need to enhance climate resilience in the region.^[23] Building community resilience in relation to health and wellbeing, alongside economic and infrastructure resilience will be crucial to the region's future.</p>	<p>Increased likelihood of natural disaster can elevate risk of damage to infrastructure assets.</p> <p>Increased uncertainty has impacted on supply chain reliability, which can impede growth in key local industries.</p>



Figure 6: The Big Bogan in the town of Nyngan, Bogan LGA. Photo credit: Destination NSW.

6. Responding to change: Initiatives and investments since 2018

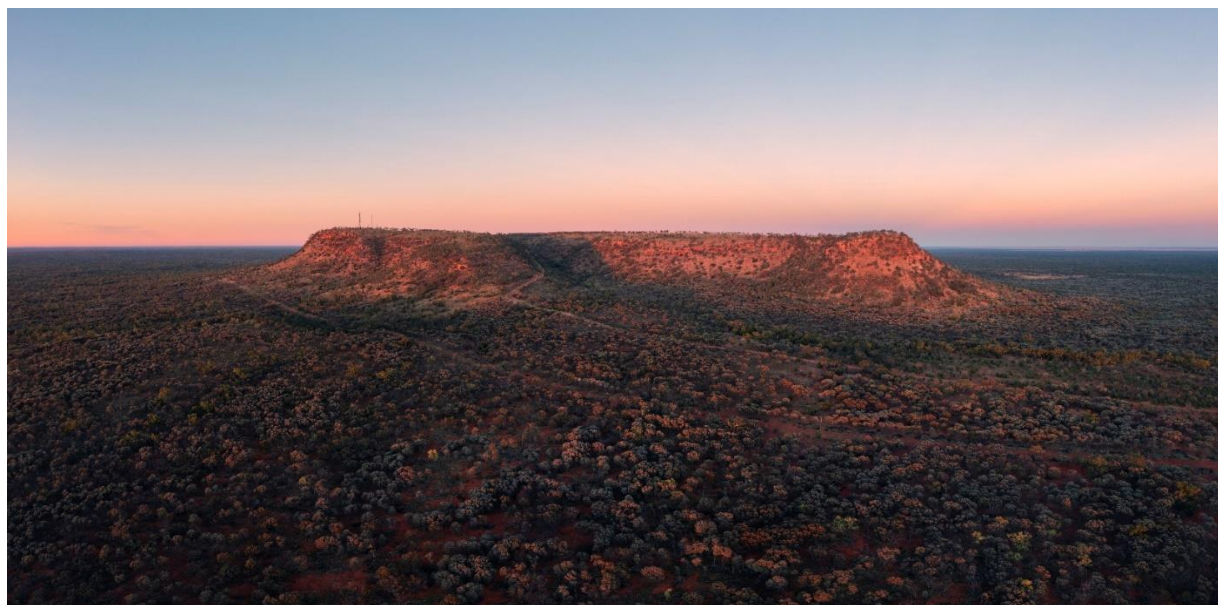







Figure 6: The sun rises over Mount Oxley, near Bourke. Photo credit: Destination NSW.

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 Draft Far West Regional Plan 2041 seeks to create a diverse economy, supported by the right infrastructure, an exceptional natural environment and resilient communities. To support this, local governments have developed Local Strategic Planning Statements, which set out land use priorities for each LGA.</p>	
<p>The Western Plains region is home to seven LGAs, each of which have developed Community Strategic Plans (CSPs) that set out each locale's vision for the future of their communities, with a focus on planning for sustainable growth and supporting the diversification of local economies.</p>	
<p>Growing Bourke 2021 seeks to identify high priority targets which will facilitate business success and growth, alongside a more liveable, amenable environment for residents and visitors.</p>	
<p>The Destination Country and Outback Destination Management Plan (DMP) 2022-2030 guides industry on priority strategies and required actions that will drive the growth of the regional visitor economy across country and outback NSW. At the LGA level, the Brewarrina Shire and Coonamble DMPs identify key growth opportunities for a sustainable tourism industry.</p>	
<p>In its Innovate Reconciliation Action Plan 2020 – 2025, Walgett Shire Council recognises the importance of collaboration with the region's Aboriginal people and organisations to help facilitate equitable economic and social prosperity.</p>	

The **Coonamble Economic Development Strategy** is focused on business attraction, growth and retention so to develop a diverse and resilient economy.



Cobar Shire Council's Creating Economic Resiliency 2021-2027 puts forward five strategies to build economic resilience, with a focus on liveability and youth development, securing water supply and facilitating business development.



The draft **Future Transport 2056 Central West and Orana Regional Transport Plan** provides a blueprint for how Transport for NSW will respond to the transport needs of the region. Key goals include boosting alternative transport (walk, cycle, public transport) and improving access to day return services to major destinations.



The **Cobar Shire Active Transport Plan** aims to improve access, safety and amenity for pedestrians and cyclists across the LGA.



The **Western Regional Water Strategy** and draft **Macquarie-Castlereagh Regional Water Strategy** outline a focus on improving water security for communities and industries, so to support community wellbeing while also ensuring key sectors have the water they need to deliver sustained growth.



Significant investments since 2018

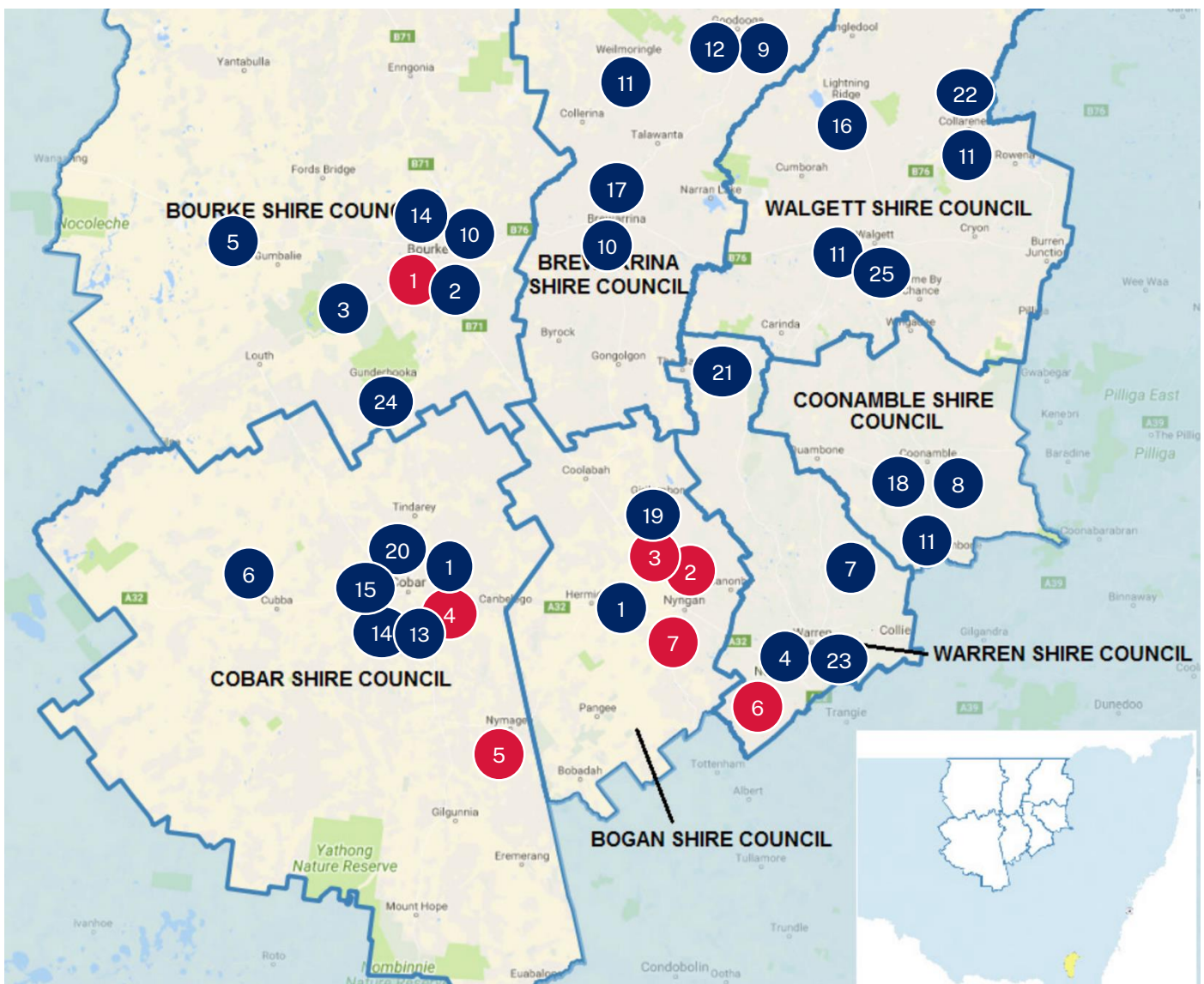


Figure 8: Significant investments in the Western Plains region since 2018.

As shown in Figure 8 above, since 2018 the region has seen 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. Public investments have largely focused on major upgrades to a number of significant roads and a range of tourism infrastructure projects. Grant funding has played a role in delivery of many of these projects.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Bourke Goat Abattoir ¹	\$60 million	
2 Little Bogan Solar Farm	\$6.6 million	
3 Yarran Hut Solar Farm	\$42 million	
4 New Cobar Complex mine extension	\$65 million	
5 Federation mine Nymagee	\$108 million	
6 Nevertire Solar Farm and Battery	\$259 million	
7 Tritton Copper mine - Constellation and Budgerygar extensions	Not available	

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Nyngan, Hermidale and Cobar pumping stations	\$46 million	
2 Bourke water security projects	\$15 million	
3 Toorale Water Infrastructure Project	>\$8 million	
4 Warren Town Levee rehabilitation	\$5.3 million	
5 Sealing of Bourke to Wanaaring Road	>\$35 million	
6 Pulpulla Road upgrade	\$5.6 million	

¹ Supported by a NSW Government grant provided through the Regional Job Creation Fund.

7	Warren to Coonamble Road upgrade	\$4.8 million	
8	Tooraweenah Road upgrade	\$23 million	
9	Goodooga Road resealing	\$28 million	
10	Bourke and Brewarrina Aboriginal medical clinics	\$13.1 million	
11	Roads to Home projects – Collarenebri, Gingie, Gulargambone, Namoi and Weilmoringle	Not Available	
12	Goodooga Community Store	\$2.8 million	
13	Cobar Early Learning Centre	\$6.8 million	
14	TAFE Connected Learning Centres – Bourke and Cobar	>\$10 million	
15	Cobar Industrial Estate Upgrades	\$4.2 million	
16	Australian Opal Centre	\$34 million	
17	Brewarrina Town Centre & River Precinct Revitalisation Program	\$5.9 million	
18	Coonamble Artesian Bathing Experience	\$6.8 million	
19	Bogan Shire Railway Revitalisation Project	\$1.1 million	
20	Great Cobar Museum upgrades	>\$4 million	
21	Burrima Boardwalk - Macquarie Marshes	\$3.4 million	
22	Collarenebri Bore Bath	\$0.9 million	
23	Western Plains Equestrian Centre upgrades	\$1.7 million	
24	Walking track and campground improvements in Gundabooka National Park	\$0.6 million	
25	Walgett Splash Park	\$1.1 million	

Regional grants programs Funding

The region has received \$131.92 million in NSW grants since 2018. Key programs in the region have included the Stronger Country Communities Fund, with \$35.80 million committed to a range of projects focused around community and recreation infrastructure and programs, and the Regional Tourism Activation Fund, with \$14.19 million committed to support five tourism projects across the region.

Grant category	Approved funding
Community	\$84.43 million
Economic	\$28.34 million
Disaster recovery	\$19.15 million

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



Figure 9: Harvesting cotton in Warren LGA. Photo credit: Warren Shire Council.

7. Western Plains 2023 economic snapshot

The population growth rate in Western Plains is projected to shift to a period of stabilisation, with potential for future growth

The region is expected to experience population stabilisation in coming years, with good potential for future growth. Accompanied by an existing relatively large retiree population, this will bring about an increased need to continue to develop and invest in enabling infrastructure such as waste, energy, and water infrastructure, as well as education and health care services to support the needs of the community. Beyond this, a lower proportion of the region’s population being in their prime working age brings about an increased need to focus on growing its skilled workforce.

Population growth

The Western Plains saw an average population growth of -1.66% per year between 2011-21 (see Figure 10). However, it is forecast the region will record a small positive rate of population growth over the period to 2031.^[24]

Facilitating or accelerating future population growth will rely upon the availability of high-quality infrastructure, adequate housing and key enabling services including childcare, education, health care and social assistance.

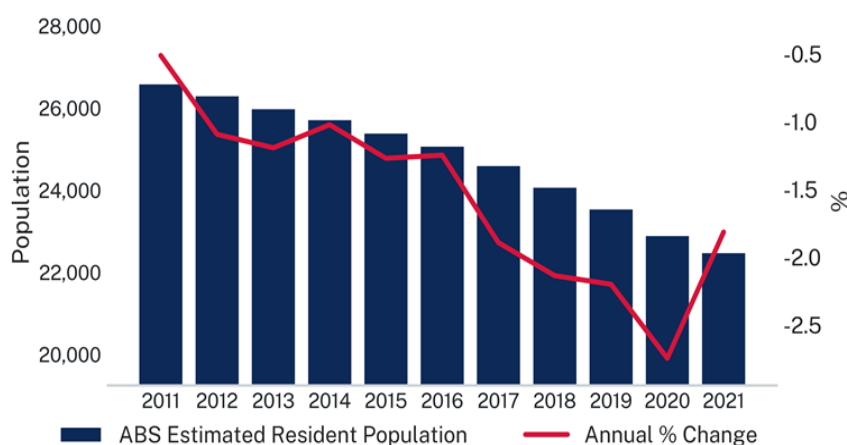


Figure 10: Western Plains FER population growth, 2011-2021 (ABS ERP, July 2022).

The region also caters to a notable fly-in/fly-out and drive-in/drive-out component in the workforce, particularly serving the engine industry of mining. Enhancing local liveability to improve the attractiveness of the Western Plains as a full-time home to these workers could support a return to positive population growth for the region.

Demographic profile

As displayed in Figure 11, the proportion of the Western Plains region in their prime working age of 20-49 years sits lower than the NSW average, while the over 50’s cohort is approximately 10% higher. This indicates the region’s population is structurally ageing, which may bring about challenges in keeping pace with health and social needs of an ageing population, while ensuring the region retains an active workforce.

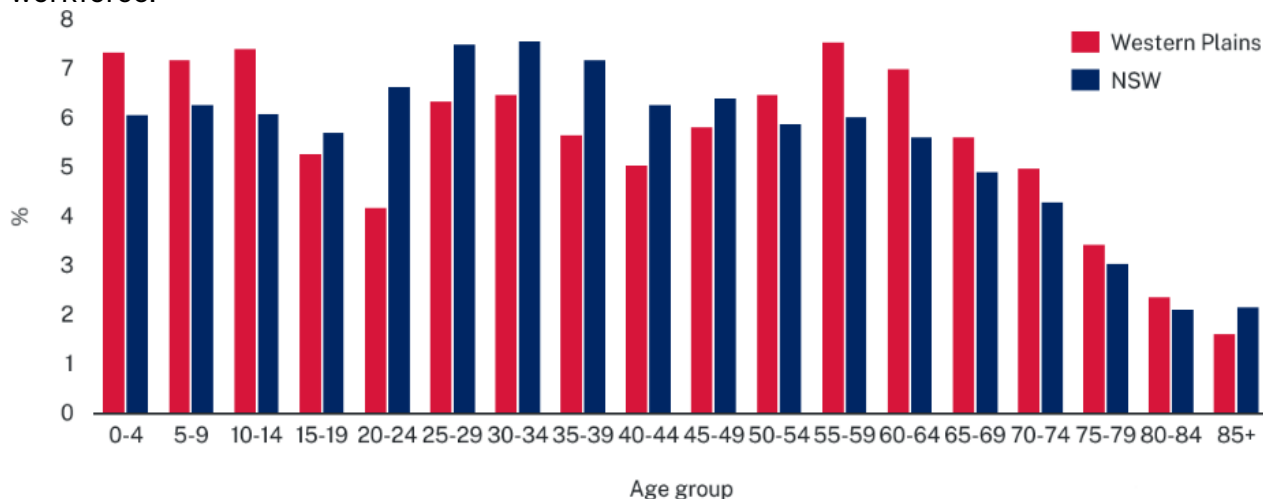


Figure 11: Western Plains FER population by age, 2021 (ABS ERP, July 2022).

Housing vacancies in the region has been consistently below 2% since 2018, impacting the ability of the region to attract workers

The region has faced a decline in housing availability since 2018, which may constrain the ability to attract workers to the region and inhibit the growth of key industries, including agriculture and tourism.

Housing availability

The housing market in Western Plains has tightened significantly since 2018. Residential vacancy rates in the region have dropped from 2.4% in January 2018 to a low of 0.3% in March-May 2021 (see Figure 12). Although vacancy rates have eased slightly, as at August 2022 they remain low at 1.5%.

A contributing factor in this improvement may be an increase in residential construction in the region. Figure 10 shows that residential building approvals have increased in recent years, with significant improvements in the rate of approvals from February 2021. However, with vacancy rates remaining below levels of a healthy market. There is a continued need to improve the rate of housing supply to enable economic and population growth.

Housing affordability

As at June 2022, the estimated median house prices^{[25][26]} across the region were:

- Bourke - \$145,000
- Coonamble - \$144,000
- Cobar - \$157,000
- Nyngan - \$162,500
- Walgett - \$135,000
- Warren - \$165,000

For Brewarrina, there was insufficient data available to estimate a median price as at June 2022.

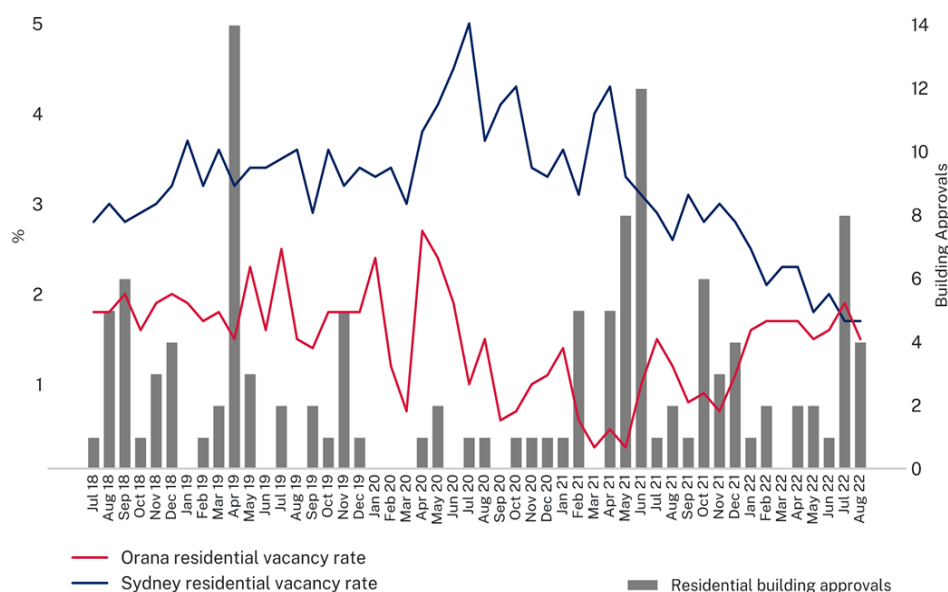


Figure 12: Western Plains FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

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.

In July 2021, the price-to-income ratio was estimated to be 1.86 in the Western Plains, significantly lower than the NSW average of 8.12.^[27] This suggests that the key housing market challenge in the region is related to housing supply rather than relative affordability.

The relative affordability of housing in the region could be a significant advantage that can be leveraged to assist in attracting workers to the region, should other factors such as strong employment opportunities, high level of service provision, community amenity and liveability be achieved.

Job vacancies have more than doubled since 2018 while unemployment rates vary across the Western Plains region

A constrained labour market has been an issue for the Western Plains region since 2018, with job vacancies more than doubling across this period in spite of major shocks to industry. There is a need to enhance local skills capacity and attract skilled workers from outside of the region to meet labour demand, particularly in the health and social services sector which may face increasing demand from an ageing population.

Employment

Unemployment rates vary across the Western Plains region, as shown in Figure 13. As at June 2022, Cobar LGA (2.6%) had an unemployment rate below the NSW average of 3.3%, while Bogan (4.5%), Warren (4.6%), Bourke (9.7%), Brewarrina (10.1%), Coonamble (6.3%) and Walgett (11.7%) sat above the NSW benchmark. After a period of improvement between 2017 and 2020, unemployment rates across the region have followed an upwards trend since mid-2020, likely triggered by the COVID-19 pandemic.

As shown in Figure 14, despite increasing unemployment rates across the region, job vacancy rates in the broader western region have tripled between May 2020 and October 2021. High vacancy rates span a range of professions including administrative (99 vacancies) and sales workers (87), engineers and maintenance workers (80). The most acute demand for staff was estimated to be in the health care and social assistance (153) sectors.

Overall job market conditions in the region suggest that there currently exists a skills gap between the current local labour force and the specific needs of key jobs in available in the region. This suggests an ongoing need to focus on training and skills development across the Western Plains region, as a way to enable local workforce development and deliver improved employment outcomes.

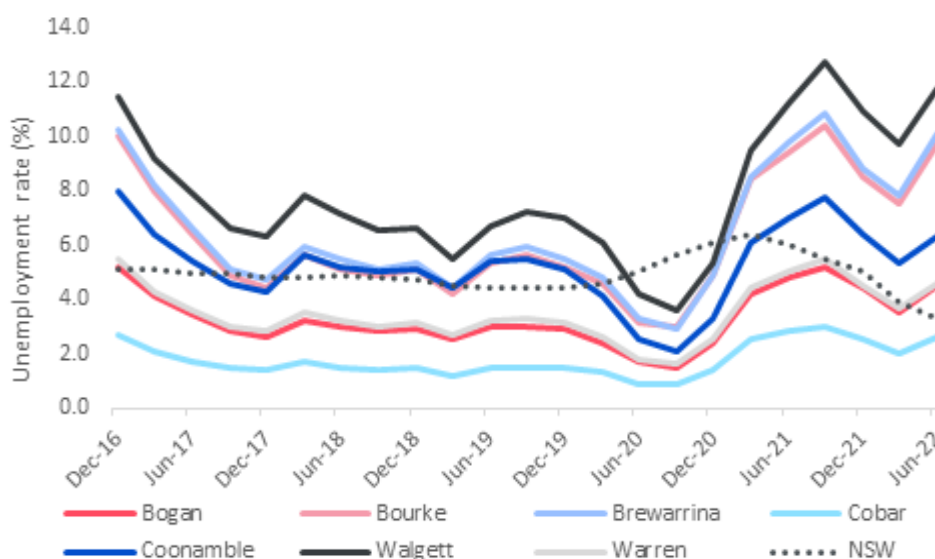


Figure 13: Western Plains FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).

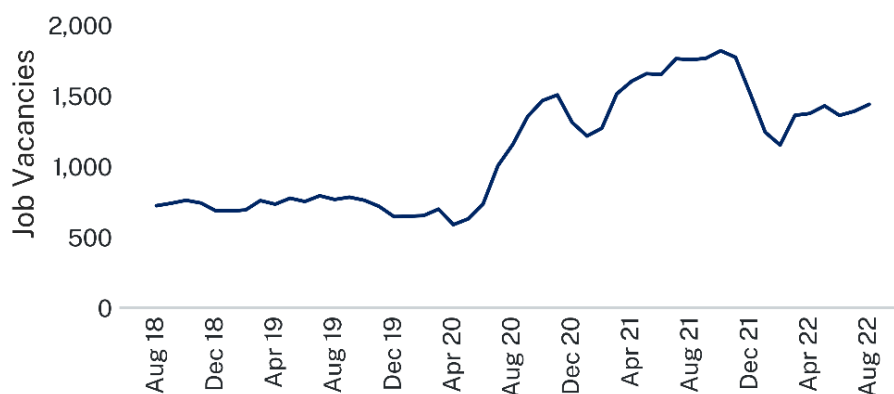


Figure 14: Job vacancies, Dubbo and Western NSW region (2018-2022) (Regional IVI, National Skills Commission, 2022).

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 economic development

Aboriginal unemployment in the Western Plains region was at 11.9% in 2021. This has dropped significantly from 23.9% in 2016, which highlights that good progress has been made on improving Aboriginal employment participation outcomes in the Western Plains. The rate remains above the state-wide Aboriginal unemployment rate of 9.8% and the NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Western Plains	2011	19.3%
	2016	23.9%
	2021	11.9%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021

These outcomes demonstrate a vast improvement in labour market participation from Aboriginal communities in the region over the past decade. However, given the significant Aboriginal community population in the region (more than a quarter of the population in the LGAs of Brewarrina, Coonamble and Bourke), further steps are needed to continue to support Aboriginal economic development in.

Given the region has successfully maintained its Aboriginal heritage and is home to many key cultural endowments, there are opportunities to develop and enhance Aboriginal-led cultural tourism offerings in the region. This can support both increased Aboriginal economic participation and also provide opportunities for Aboriginal business development.

Close collaboration and a shared goal of promoting economic prosperity between representatives of Aboriginal communities, all levels of government, businesses and industry will be needed to fully explore these opportunities.



Figure 15: Young people perform a traditional dance outside Tin Camp Studios in Walgett LGA. Photo credit: Walgett Shire Council.

Western Plains region 2023 engine and emerging industries

The Western Plains region has a \$1.7 billion economy. In spite of significant shocks since 2018, the Western Plains region’s engine industries have remained strong. While agriculture and mining continue to represent the most significant economic contributors to the Western Plains, the tourism industry has faced challenges in decreased visitation and expenditure over the course of the COVID-19 pandemic. The relative strength of industries in the region is highlighted through Location Quotient (LQ) analysis¹ as displayed in Figure 16, in which the size of the bubbles correlates with industry size.

Engine industries

Agriculture (LQ 9.64) continues to be a significant specialisation for the Western Plains, generating \$330 million of GVA to the local economy in 2020. This is driven largely by a strong sheep, grains, beef and dairy sector with an LQ of 15.9, generating around 83% of the industry’s output.

Mining (LQ of 6.13) is the other core pillar of the regional economy, contributing \$487 million In GVA to the local economy in 2020. Non-ferrous metal ore mining is the dominant industry sub-sector with an LQ of 72.1, accounting for approximately 90% of the industry’s output.

Despite recent shocks, **tourism** still stands as a key source of economic output for the region, bringing in \$62 million in expenditure in 2021, despite an estimated 75% drop from pre COVID-19 spending levels.^[28] Nature-based tourism and national parks in particular are significant contributors to the sector. In 2018, they contributed approximately \$45.6 million in value to the region, with an estimated 666 jobs directly and indirectly supported.^[29] The region’s natural and heritage endowments are key to the success of the region’s visitor economy.

While the public administration and safety industry also makes a valuable contribution to the regional economy, adding \$132 million in 2020, this is largely due to the presence of seven councils in the FER and is not considered to be a strategic growth industry.

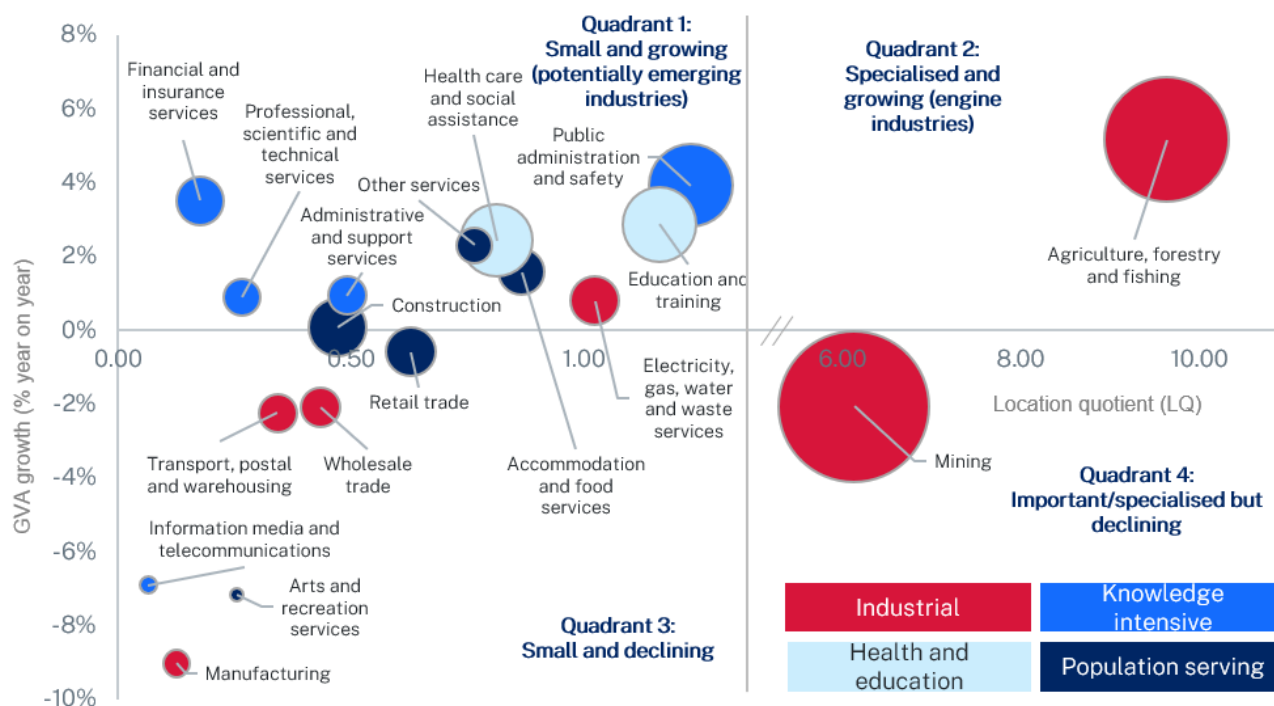


Figure 16: Location Quotient (LQ) analysis by GVA, 2011-2020 (REPLAN, 2020).

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 remained consistent since the 2018 REDS, where financial and insurance services and electricity, gas, water and waste services were identified as potential growth sectors (see Figure 17).

Energy supply (including renewables) continues to demonstrate growth and potential as an emerging specialisation for the region. The local climate is ideal for solar generation, as demonstrated by the 102MW solar farm at Nyngan. The industry could continue to grow if sufficient transmission network infrastructure can be provided to connect renewables to the wider electricity grid. The industry is driven by the electricity distribution subsector, with an LQ of 1.5.

Population-serving sectors have also shown consistent growth in the region over the past decade, with the **education and training** and **health care and social assistance** sectors experiencing average annual growth of 2.9% and 2.4% between 2011- 2020, respectively. Enabling ongoing growth in these industries will be critical to supporting population growth, while also providing significant opportunity to increase employment and enhance the skills capacity of the local workforce.

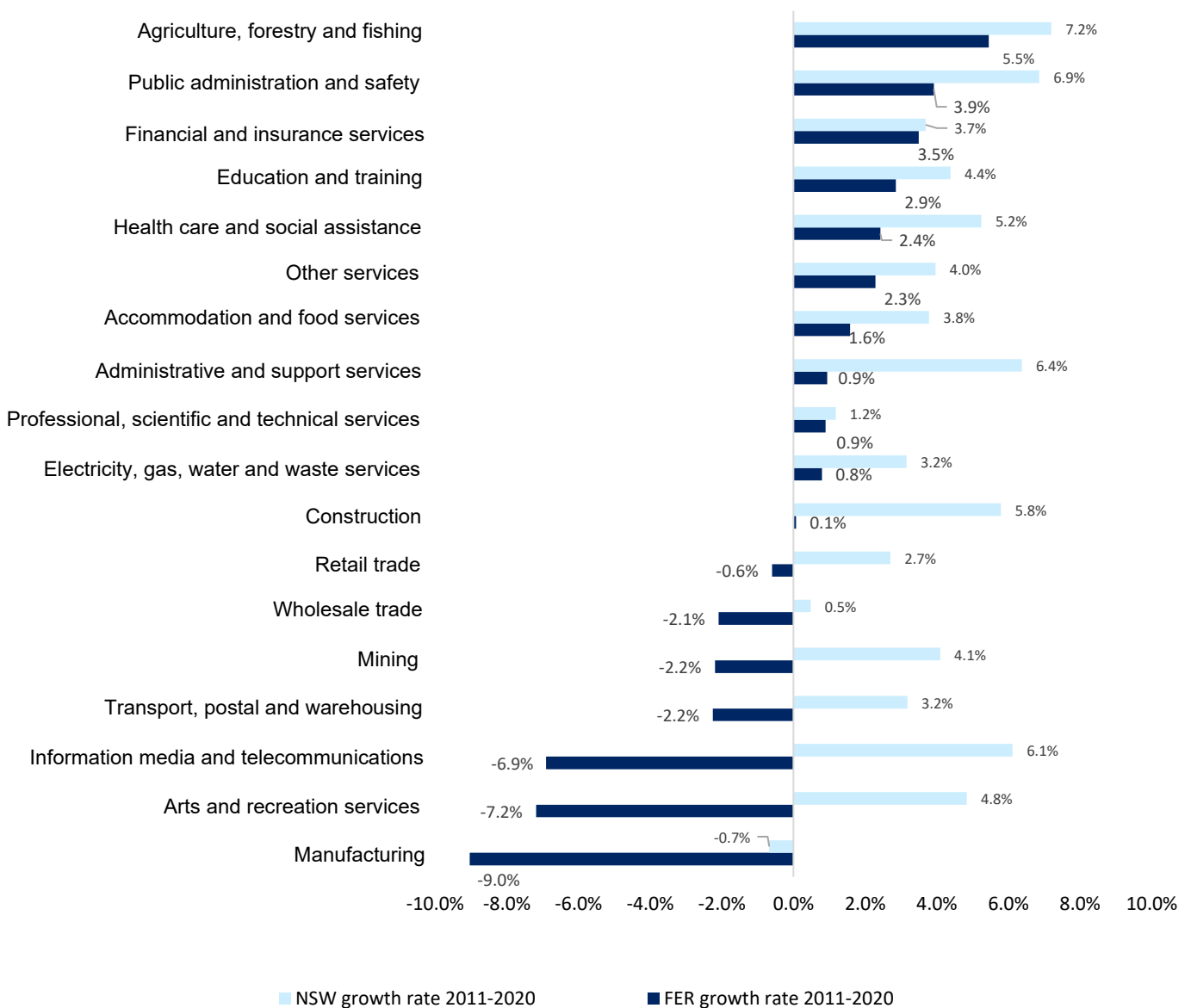


Figure 17: Change in GVA by Industry (% YoY), 2011-2020 (REMPAN, 2020).

Western Plains region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Western Plain's economy and regional competitiveness (see page 11). Despite recent shocks impacting many key endowments, consultation confirmed most remain valid including:

- the Darling River Basin, Macquarie River and Barwon River System
- landscapes, heritage and culture
- non-ferrous ore and precious stone deposits
- solar resources
- institutional endowments.

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.

+ Water infrastructure	The region has invested over \$50 million to upgrade water infrastructure since 2018. Improving water security is vital to supporting the wellbeing of residents and visitors to the region, as well as being a key enabler for sustained economic growth.
+ Enhanced regional tourism offering	Investments in tourism infrastructure since 2018, including the Burrima Boardwalk and the Mulgowan and Dry Tank projects in Gundabooka National Park, as well as a strong regional policy focus on growth of the visitor economy, can underpin the continued growth in this sector.



Figure 18: Nevertire Water Tower Shearer in Warren LGA. Photo credit: Steven Christian.

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

Opportunities and vulnerabilities in engine and emerging industries

Agriculture

Agriculture continues to be a key engine industry in the Western Plains. An ongoing focus is needed on enhancing water and energy security and supporting workforce attraction to support future growth.

GVA (2020, \$m)	330
Employment (2021)	1,990
LQ score (2020)	9.64
LQ sheep, grain, beef & dairy (2020)	15.9
LQ agriculture, forestry, and fishing support (2020)	10.9

Strengths

- Agriculture continues to be a key driver of economic growth in Western Plains, recording 5.5% average annual growth between 2011 and 2020.
- Sheep, grain, beef and dairy is the dominant sub-sector accounting for 82.9% of industry output in 2020 and featuring most heavily in Bogan, Brewarrina, Coonamble and Walgett shires.
- Cotton farming features heavily in Warren Shire, which is complemented and supported by the local textile manufacturing sector.

Vulnerabilities

- Increasing occurrences of extreme climate events may continue to hamper production and farm profitability. Enhanced water and energy security will be critical to future prosperity in the sector.
- Significant farm labour shortages have been caused by COVID-19 border restrictions, which has impacted productivity in the sector.
- While carbon credits schemes provide significant opportunity to diversify income streams for landowners, some schemes create restrictions on the ability to use land for agricultural purposes.

Opportunities

- Continued investment in water security projects such as raising the weir at Bourke and actions to enhance river amenity can help mitigate impacts of future droughts.
- Increasing the capacity of downstream agricultural product processing in the region provides an opportunity for enhanced value add in the sector. Recent examples include investments into new grain sheds and the goat abattoir in Bourke, which is also expected to attract overseas workers.^[30]
- A shortage of farm labour has increased focus on expanding the role of automated farming processes, with investment in agricultural R&D that can deliver long term productivity gains representing an important opportunity for the sector.

Mining

Mining remains a key part of the Western Plains economy, despite a range of key challenges including workforce shortages and supply chain disruptions.

GVA (2020, \$m)	487
Employment (2021)	801
LQ score (2020)	3.13
LQ non-ferrous ore (2020)	72.1
LQ non-metallic mineral (2020)	7.3

Strengths

- The industry is underpinned by mining activity in Cobar and Bogan, with an abundance of non-ferrous ore and precious stone deposits.
- The region also has significant potential critical mineral resources, including cobalt, scandium and platinum group element deposits near Nyngan.
- Lightning Ridge in Walgett Shire is also home to black opal mining.



Figure 19: Fort Bourke Hill Lookout. Photo credit: Cobar Council.

Vulnerabilities

- The sector is susceptible to supply chain disruptions, fluctuations in input costs, energy supply challenges and freight costs.
- Workforce shortages and competition with other mining companies for young and skilled talent have been impacting the sector.
- Lack of suitable worker accommodation is also a key impediment to mine expansion projects and is contributing to an increasing number of mining workers not living in the region, but rather working as part of a fly-in/fly-out or drive-in/drive-out workforce.

Opportunities

- There remains significant deposits of minerals yet to be fully explored in the region. Continued exploration and approval of new mines and mine expansion projects e.g. a new scandium mine in Nyngan and expansion of existing copper mine in Bogan can support long term growth in the sector.
- Ongoing investments to upgrade rail, freight and road infrastructures can improve efficient access to markets, with potential opportunities being opened up by investment in the neighbouring inland rail for more efficient transportation of ore products.
- Improving energy and water infrastructure in the region would increase the availability of reliable access to these critical inputs for the mining sector.

Tourism

Despite the impacts of the COVID-19 pandemic, the tourism industry remains a key emerging specialisation in the region, with significant potential for growth.

Visitor spend (2021, \$m) ^[28]	88
Employment (2021) ^a	1,083
LQ score (2020) ^b	0.87
LQ Accommodation (2020)	1.4
LQ Food & beverage (2020)	0.9

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

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

Strengths

- The region is home to a significant range of natural endowments including the Macquarie Marshes between Walgett and Nyngan, the historic Gundabooka and Toorale National Parks and the Darling River Run.
- The region has maintained its Aboriginal heritage, which is an important tourism endowment, and presents significant opportunities to facilitate growth in Aboriginal economic participation.

Vulnerabilities

- The industry is vulnerable to significant impacts from unpredictable externalities, as highlighted by the significant impacts of the COVID-19 pandemic.
- Climate change impacts may also challenge the sector, with projections of more extreme weather potentially impacting destination attractiveness and access.
- Limitations on digital connectivity in many parts of the region also impact on the attractiveness of some remote locations for visitation, given they can act as a key constraint on visitor access and safety.

Opportunities

- Continued investment into improved air services and other transport infrastructure such as sealed roads can help support tourist accessibility.
- Substantial investment being made into a range of significant tourism assets (see page 19) including the Australian Opal Centre, Bogan Shire Railway Revitalisation project, Burrima Boardwalk, Cobar Great Museum and the Coonamble Artesian Bathing Experience will help to enhance and diversify the region's visitor experiences.
- Significant opportunity exists to develop cultural nature-based and Aboriginal tourism offerings in the Western Plains.

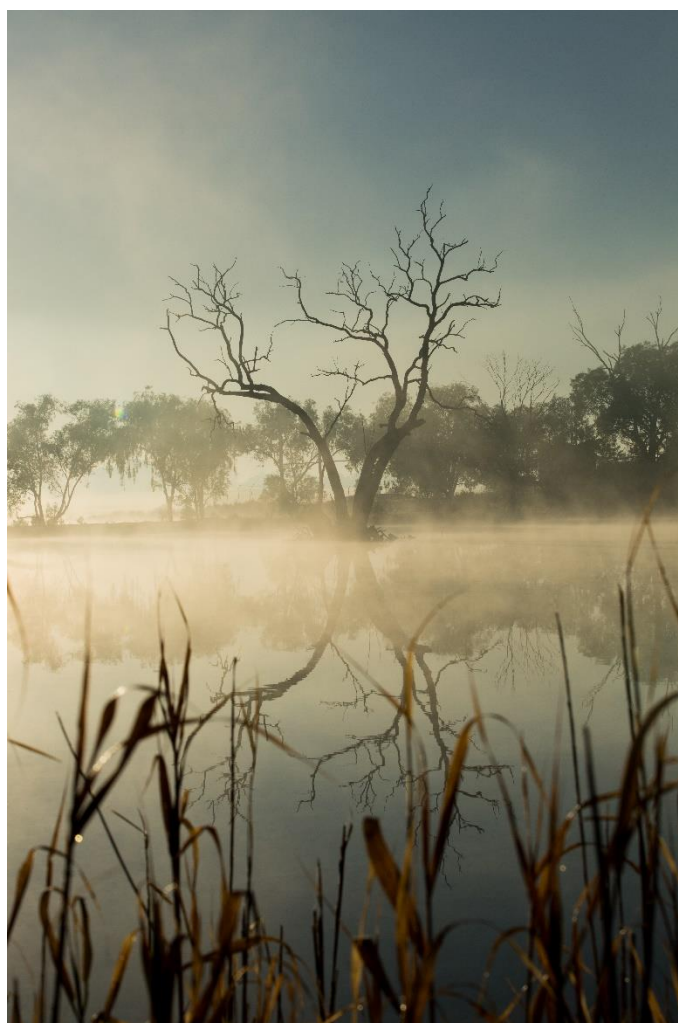


Figure 20: Tiger Bay. Photo credit: Warren Shire Council.

Energy supply (including renewables)

Renewable energy generation represents an emerging specialisation in the region and the natural climatic endowments of the region provide significant scope for future growth.

GVA (2020, \$m)	44
Employment (2021) ^a	112
LQ score (2020)	1.02
LQ electricity distribution (2020)	1.5
LQ gas supply (2020)	5.4

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

Strengths

- The region has a hot semi-arid climate which is highly favourable for solar energy generation.
- The proximity of the southern end of the region to the Central-West Renewable Energy Zone can provide benefits to key industry sectors, given they will have enhanced access to an emissions free, locally produced energy supply.

Vulnerabilities

- A lack of sufficient transmission network capacity to host large-scale solar farms in the region represents a key constraint at the current time.
- Large-scale energy generation projects require a large amount of developable space, which may compete with other land uses given increased demands associated with commercial, industrial and residential growth in the region.
- The region also faces challenges associated with meeting housing needs for workers that may come to the region to support new or expanded renewable energy projects.

Opportunities

- Renewable energy projects can assist energy intensive local industries such as agriculture and mining, by helping to enhance local energy security as well as potentially assisting their transition towards net zero.
- As part of future project planning, a greater focus on ensuring local skills training aligns with ongoing employment opportunities can help deliver broader benefits to the community associated with major project investment through local workforce and skills development.

Key themes in stakeholder consultation

Stakeholders from the Western Plains region noted the area is facing both challenges and opportunities related to its population growth rate, while recent climatic events have brought to the fore the need to build community and economic resilience. Stakeholders recognised significant impediments to growth in the region related to housing availability and affordability, as well as challenges in attracting and retaining skilled workers to deliver key services such as healthcare, education, and childcare.

Housing availability

As reflected in the analysis of housing supply (see page 22), consultation revealed concerns amongst stakeholders that housing shortages will only worsen in the face of potential future population growth, given there will likely be a need to house workers associated with industry growth and major projects.

Skills shortage

Significant workforce and skills shortages in the region, compounded by a lack of migrant workers, has put pressure most sectors. Stakeholders highlighted the flow on impacts of a shortage of childcare workers, such as preventing women with young children from participating in the workforce.

Building resilience and water security

Recent climatic events, alongside the impacts of the COVID-19, have highlighted the need to build a focus on the principles of resilience into policy, programs and projects. Stakeholders outlined a key focus for the region should be placed on increasing water and energy security, so to mitigate the impacts of future droughts and increase the reliability of utility supply for key engine industries in the region.

Updated 2023 REDS strategies

The focus of the 2018 strategies for the Western Plains region remains relevant. However, following consultation and analysis of the economic context, a number of changes have been made to focus on:

- supporting population and industry growth by developing the key skills base in the local workforce,
- improving the reliability of enabling infrastructure and services while building climate resilience,
- improving liveability in the region and support increased housing availability, and
- enhancing digital connectivity in the region and investing to support improved market access.

Reflecting the changes outlined above, the 2022 REDS Update strategies for the Western Plains region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

New	Improve the region's liveability and housing availability to enable population and skills growth and community wellbeing.
Amended	Drive growth in agriculture, value-add manufacturing and transport through investments in market access and enhancing digital connectivity.
Amended	Optimise economic activity in agriculture and mining by increasing climate and economic resilience, as well as energy and water security.
Amended	Grow tourism to enrich and diversify the region's visitor economy with further investments in tourism infrastructure and transport accessibility.
New	Improve access to health care, aged care, education, and childcare to attract and retain working age people and families.

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
Improve the region's liveability, access to services and housing availability to enable population and skills growth and enhance community wellbeing.	Infrastructure	Deliver a Regional Housing Delivery Plan to understand current and future housing needs, barriers to supply and identify recommended actions to overcome these.	Department of Regional NSW (DRNSW) , local councils, Department of Planning and Environment	Lack of adequate housing and services can constrain population growth.
	Government, regulation and information	Collaborate with local councils in the delivery and improvement of water infrastructure across the region to meet future town water supply needs, particularly in times of drought and/or growth.	DRNSW , local councils	Future proof the region's water supply by improving water infrastructure capability.
Drive growth in agriculture, value-add manufacturing and transport through investments in market access and enhancing digital connectivity.	Infrastructure	Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure, and support delivery agencies to embed minimum connectivity standards into infrastructure programs.	NSW Telco Authority , DRNSW, local councils	Enabling growth and productivity through greater digital connectivity.
	Infrastructure	Work with local councils to improve transport infrastructure to support connectivity and freight movement, including improvements to the road network and maintaining ongoing air connectivity across the region through airstrip maintenance and improvement.	Transport for NSW (TfNSW) , local councils, Roads and Maritime Services, DRNSW; Department of Infrastructure, Transport, Regional Development, Communication and the Arts (Aviation)	Improve physical connectivity between LGAs within the region.

Strategy	New Enablers		Lead and support	Rationale
Optimise economic activity in agriculture and mining by increasing climate and economic resilience as well as energy and water security.	Infrastructure	Implement recommendations from the Western Regional Water Strategy and Macquarie Regional Water Strategy to improve water security for community, industry and the environment, including through the delivery of the Nyngan to Cobar pipeline.	DPE Water; DRNSW, local councils	Increasing the resilience of energy and water supplies can support engine industry growth and provides certainty to communities.
	Government, regulation and information	Investigate near and medium term energy infrastructure requirements to support growth in engine industries including agriculture and mining, and to support emerging opportunities in the broader region.	DRNSW, local councils, DPE	Leverage recent investments in the region and create energy security for key industries.
Grow tourism to enrich and diversify the regional economy with further investments in tourism infrastructure and transport accessibility.	Infrastructure	Support ongoing investment in visitor attractions and experiences, with particular focus on Aboriginal culture and nature-based experiences, and improve tourist access by upgrading roads to sealed tourist routes.	Local councils, TfNSW, local Aboriginal land councils, Destination NSW, Destination Country and Outback NSW, Create NSW, National Parks and Wildlife Service, Regional Arts Development Organisations	Promote a vibrant visitor economy and ensure tourist accessibility.
Improve access to health care, aged care, education, and childcare to attract and retain working age people and families.	Infrastructure	Develop a workforce strategy focused on developing insights and actionable strategies to improve the attraction, training and retention of a skilled workforce.	Training Services NSW; local councils; DRNSW; Western NSW Local Health District; TAFE NSW	Lack of services can constrain population growth and contribute to migration out of the region.

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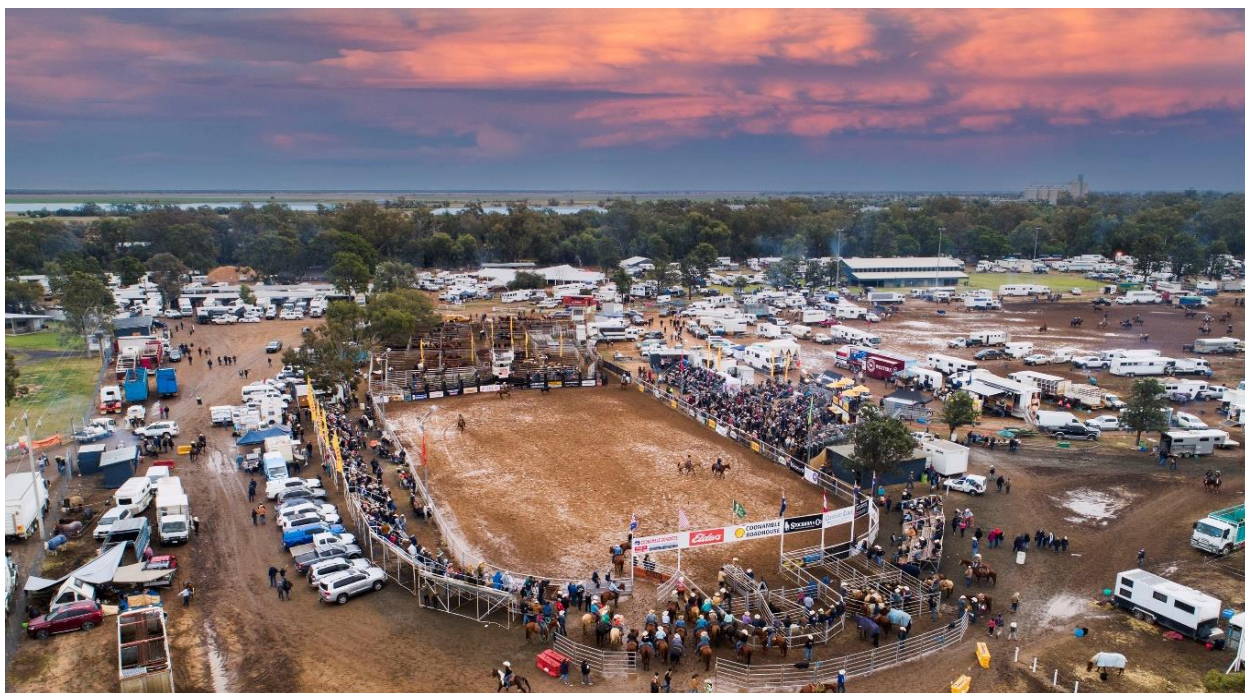


Figure 21: The Coonamble Rodeo. Photo credit: Coonamble Shire Council.