

## Queanbeyan-Palerang 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.

## **Published by the Department of Regional NSW**

Title: Queanbeyan-Palerang Regional Economic Development Strategy - 2023 Update

First published: February 2023

## **Acknowledgements**

The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Queanbeyan-Palerang region to the development of the 2023 REDS Update, with particular thanks to staff from Queanbeyan-Palerang Regional Council and the Australian Capital Territory Government. 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.

Unless otherwise acknowledged, photographs have been provided by Visit Queanbeyan-Palerang. Cover image: The main street of Braidwood.

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# 1. Executive summary

## Changes in the Queanbeyan-Palerang 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 Queanbeyan-Palerang region has seen significant investment since 2018, with additional projects in the planning or delivery stages**



Progress continuing on the **Queanbeyan Sewage Treatment Upgrade** project.



\$1.5m **Bicentennial Hall Upgrade**.



Major upgrades to **Ellerton Drive, Tarago Road**, and **Araluen Road** totalling \$96 million.



\$75 million investment to deliver the **Queanbeyan Cultural and Civic Precinct**.

**The Queanbeyan-Palerang region has experienced strong population growth since 2018, which is creating housing availability and affordability challenges**



+ **5.4% population growth** since 2018.



The proportion of the **population over 55 years** has **increased 1.4%** since 2018.



Housing **vacancy rates** sit **below 1%**, with **median house prices** rising by **39%** since 2018.



The **unemployment rate** has increased slightly since 2018, reaching **2.8%** as at June 2022, and **job vacancies** reached an all-time high of **1,284** in 2022.

## The region's key industries (including construction, manufacturing, tourism, and agriculture) have remained resilient and are driving continued economic growth

	Construction	
+ 5.4% Year-on-Year (YoY) growth from 2011-2020	\$423 million Gross Value Added (GVA) in 2020	4,024 jobs supported in 2021
	Manufacturing	
- 2.3% YoY growth from 2011-2020*	\$151 million GVA in 2020	1,180 jobs supported in 2021
	Tourism	
+ 5.3% YoY growth from 2011-2020	\$93 million visitor spend in 2021	4,693 jobs supported in 2021
	Agriculture	
+ 9.7% YoY growth from 2011-2020	\$77 million GVA in 2020	553 jobs supported in 2021

\*The observed manufacturing industry decline is in line with a broader nationwide trend of manufacturing sector decline. However, the industry remains a significant specialisation and contributor to the region's economy.

## Key themes from local consultation

Stakeholders from the Queanbeyan-Palerang region have highlighted housing supply, effective collaboration between various levels of government, and developing a skilled local workforce as key priorities for the region.

### Housing availability and affordability

	Stakeholders highlighted housing availability and affordability as being key constraints on attracting and retaining skilled workers in the region.
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### Strategic collaboration

	Local stakeholders emphasised the need for greater collaboration between Queanbeyan-Palerang Regional Council and the Australian Capital Territory Government to maximise the economic potential of the region.
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### Skilled local workforce

	Building local skills capacity to support the availability of key workers was raised by stakeholders as representing a key priority for the region.
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## Queanbeyan-Palerang REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p><b>Improve the digital connectivity and access to harness the innovative capacity of the workforce and local businesses.</b></p>	<ul style="list-style-type: none"> <li>Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.</li> <li>Invest in business mentoring and ongoing support to increase digital literacy around opportunities and pathways to grow digital channels.</li> </ul>
<p><b>Re-establish the town centres as lively neighbourhoods and public spaces.</b></p>	<ul style="list-style-type: none"> <li>Invest in place planning to develop and activate community spaces that enhance social and economic outcomes.</li> <li>Work with local government to strategically plan for housing supply through a Regional Housing Delivery Plan, focussing on development within existing centres where supported by existing strategic plans.</li> <li>Review the existing public transport network and investigate new bus services between the town centre and residential areas.</li> </ul>
<p><b>Sustainably grow the population and develop a skilled workforce suited to internal market needs.</b></p>	<ul style="list-style-type: none"> <li>Conduct a skills demand and local supply analysis to support the Regional Job Precinct, including consideration of opportunities to leverage the Precinct's proximity to the ACT's highly skilled workforce.</li> <li>Collaborate with the ACT Government and Queanbeyan-Palerang Regional Council to investigate a coordinated, strategic approach to cross-border infrastructure, road connectivity and public transport connections to strengthen access to labour, health and education.</li> <li>Investigate water security needs to inform further investment in water infrastructure, including the progression of initiatives to secure long-term water security for Bungendore.</li> </ul>
<p><b>Further develop specialised agriculture, manufacturing, and food &amp; cultural tourism.</b></p>	<ul style="list-style-type: none"> <li>Facilitate investment in commercial opportunities to support the Monaro Rail Trail and passenger road connectivity for improved visitor access.</li> <li>Investigate land use zonings to activate and support an advanced manufacturing ecosystem. Consider coordinated strategic planning with the ACT in light of new rezoning around Queanbeyan and ACT border.</li> </ul>

## 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: Shops on Bungendore's main street.



Figure 2: Sheep farming is an important component of Queanbeyan's agricultural sector.

### 3. About the Queanbeyan-Palerang region

The Queanbeyan-Palerang FER is immediately adjacent to the Australian Capital Territory, and approximately 3 hours and 7 hours drive from Sydney and Melbourne, respectively. As shown in Figure 3, the region covers the Queanbeyan-Palerang Local Government Area. The major population and administrative centre of the region is Queanbeyan, with Braidwood, Bungendore and Googong representing other significant towns in the region.

Total area covered (km <sup>2</sup> )	5,319
Population (2021)	63,364
Size of the economy (2020)	\$2.554 billion
Total employment (2021)	34,394

Source: ABS Estimated Resident Population, 2021; REMPLAN, 2020; ABS Census, 2021

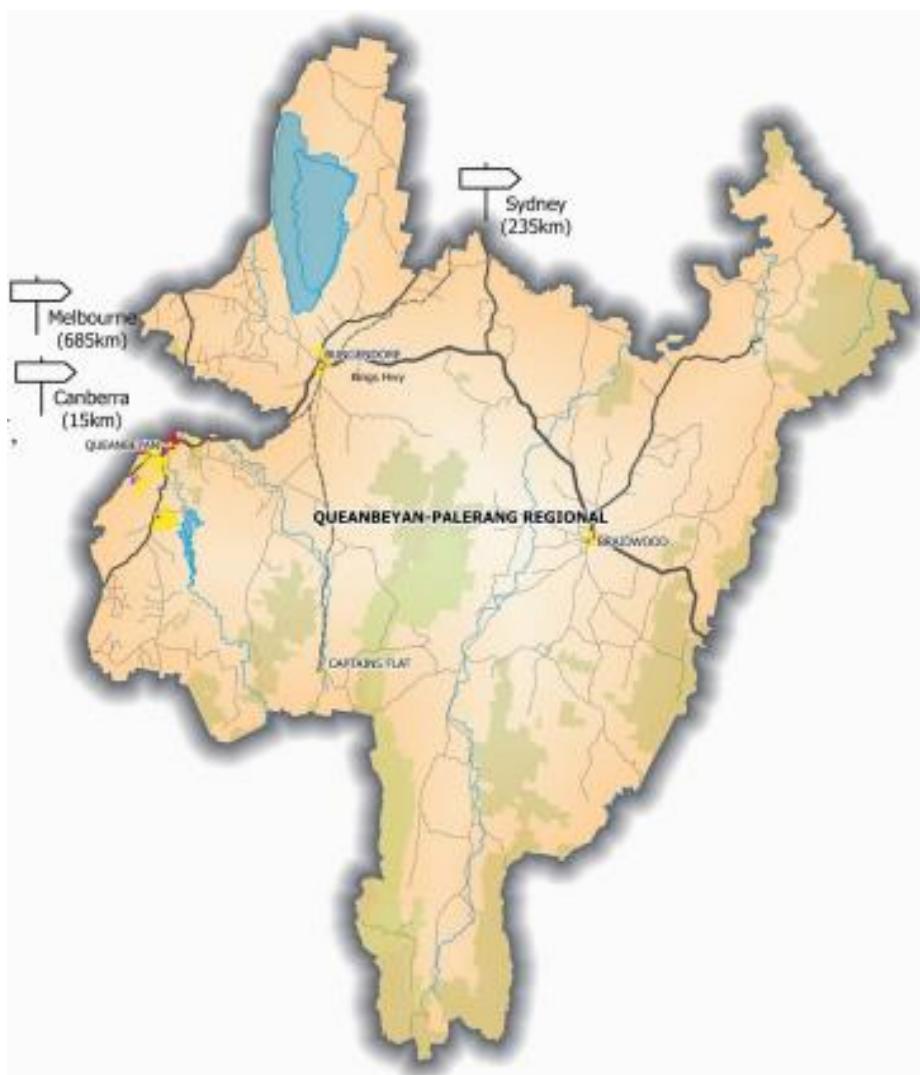


Figure 3: Map of the Queanbeyan-Palerang Functional Economic Region.

## 4. The 2018 Queanbeyan-Palerang REDS and 2020 Bushfire Addendum

The 2018 Queanbeyan-Palerang REDS identified key strategies to deliver on the region's vision to create a diverse and smart economy driven by a skilled workforce, and to support population growth through urban revitalisation. The strategies focused on deepening industry specialisations, capitalising on geographic and institutional endowments and improving digital connectivity to enable growth.

Following the 2019-2020 bushfires, the NSW Government developed the 2020 Queanbeyan-Palerang REDS Bushfire Impact Addendum, which offered 18 additional areas of strategic focus associated with guiding recovery from the bushfires and building long term community and economic resilience.

### 2018 Queanbeyan-Palerang strategies

	Improve the digital connectivity and access to harness the innovative capacity of the workforce.
	Re-establish the town centres as 'Places for People'
	Grow the population and internal markets of the region
	Further develop specialised agriculture and food and cultural tourism
	In addition to the 2018 core strategies, the 2020 Queanbeyan-Palerang Bushfire Impact Addendum outlined 18 additional short, medium, and long-term priorities focused on: <ul style="list-style-type: none"><li><b>Recovery</b> - overcoming damage to the agricultural and tourism sectors.</li><li><b>Resilience</b> - pursuing growth and diversification opportunities which may improve the region's economic and community resilience.</li></ul>

### 2018 Queanbeyan-Palerang specialisations

The primary industry specialisations below were identified as comparative advantages for the Queanbeyan-Palerang region in the 2018 REDS, based on employment concentrations.

	Tourism
	Information media and telecommunications
	Professional, scientific and technical services
	Agriculture (cattle production and niche agriculture)
	Advanced manufacturing
	Public administration and safety

## 2018 Queanbeyan-Palerang endowments

Queanbeyan-Palerang is home to a wealth of physical, institutional, built, and human endowments. The following list was identified as key endowments that support and enable success and growth across its 2018 industry specialisations of public administration and safety, construction, agriculture, and tourism.

Endowment	Relevant 2018 specialisation
Proximity to Canberra and Sydney	All
Gateway to Snowys and South Coast	 
Queanbeyan River	 
Arable land, forests and National Parks	 
Queanbeyan Regional Hospital	
Canberra Airport	   
Braidwood's preserved heritage	
Monaro and Kings Highway	 
Rail network	 
Canberra Avenue and Pialligo Avenue Corridor	   
Queanbeyan-Palerang Regional Council (QPRC)	All
Balance of lifestyle, social and economic opportunities	   
The Federal Government and State Government agencies	All
Aboriginal heritage	
Collaboration between community members	All
Local culture and food specialities	 
Canberra Region Joint Organisation	All
Diverse specialised skill sets	    

## 5. The big picture: Shocks and trends impacting the Queanbeyan-Palerang region since 2018

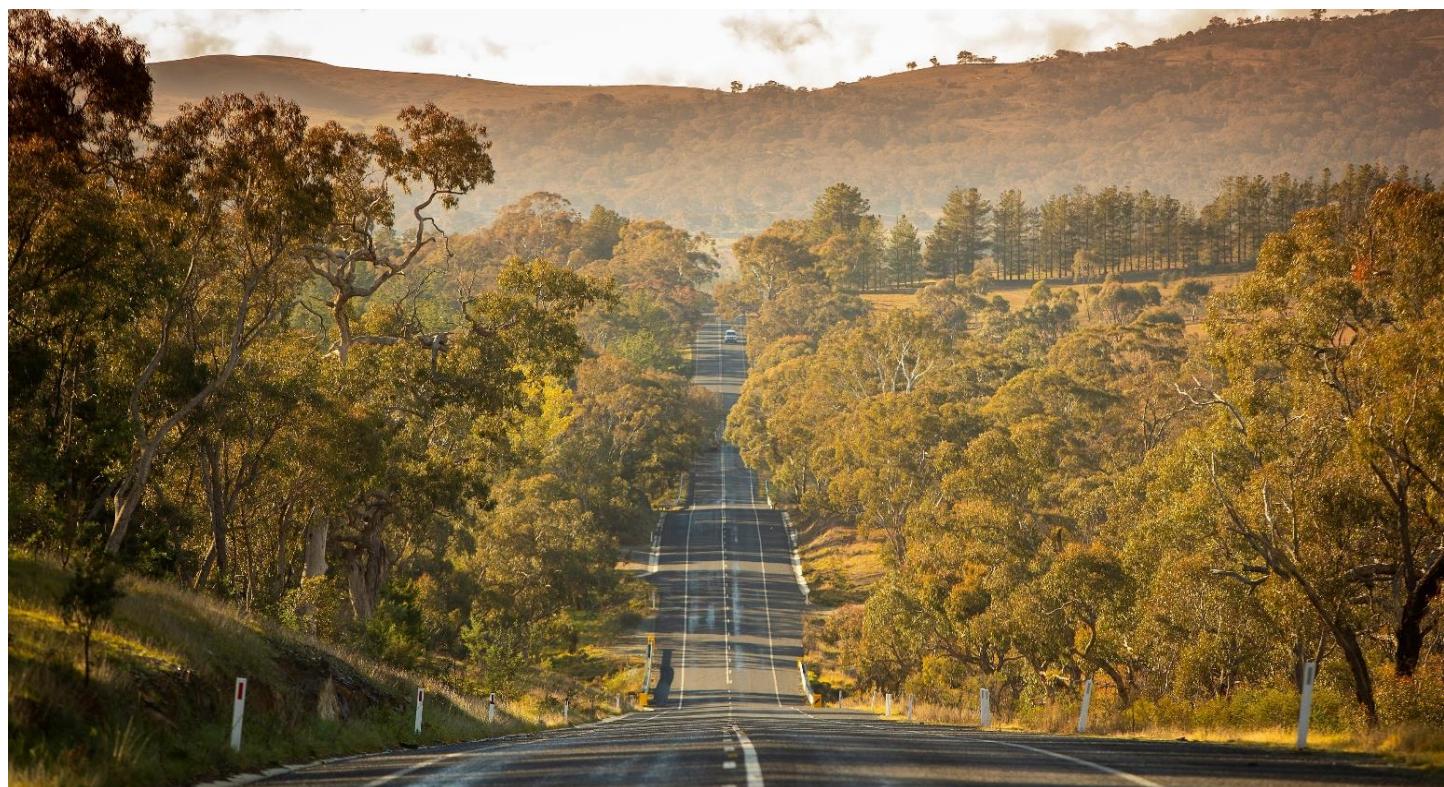


Figure 4: Kings Highway, Queanbeyan-Palerang region.

### Significant events impacting major industries

A sustained period of drought, followed by major bushfires, had severe environmental and economic implications for the region. COVID-19 related movement restrictions further challenged local industry, particularly the visitor economy. From the period 2018 to 2022 the region had 6 disaster declarations<sup>[1]</sup> and received \$16.01m in disaster recovery grants funding. Recovering from these events and developing both industry and community resilience has been a key priority for the region since 2018.

#### Drought

Queanbeyan-Palerang endured a period of intense drought from 2018 to 2020. As shown in Figure 5, the NSW Combined Drought Indicator classified parts of the region to be in intense drought in 2019.<sup>[2]</sup>

The prolonged drought was particularly detrimental to the region's agricultural specialisations<sup>[3]</sup>, in particular cattle production around Braidwood as dams and feed in paddocks dried up.<sup>[4]</sup>

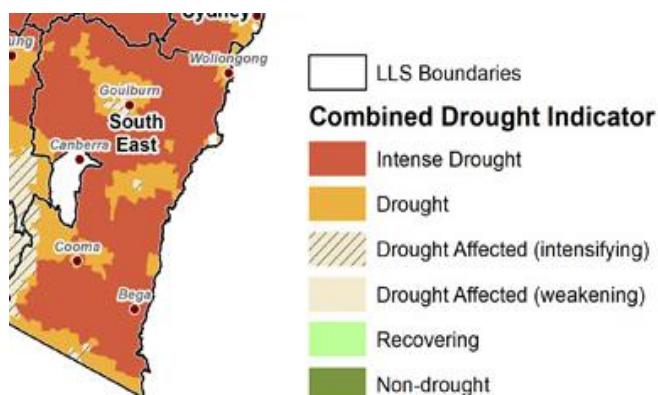
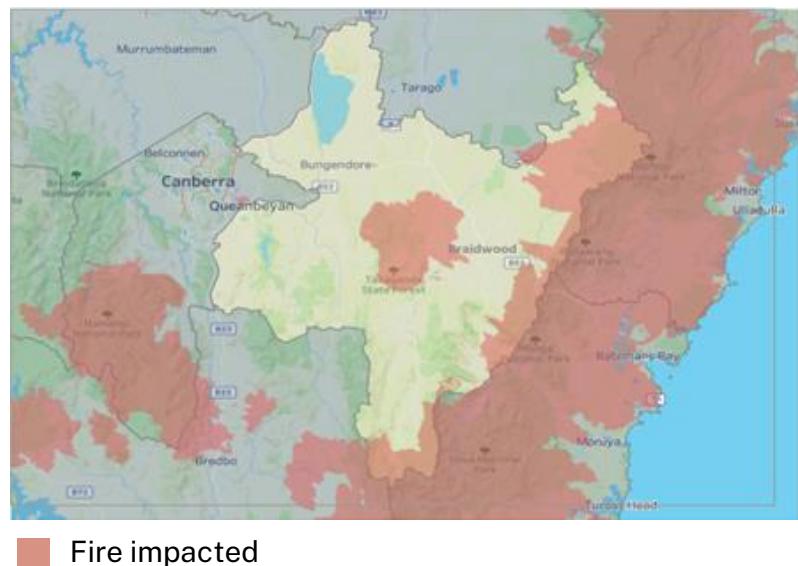


Figure 5: Combined drought indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

## Bushfires

Bushfires had a significant impact on the region in 2019-20. As shown in Figure 6, approximately 24% of the total area of the region was burnt, impacting multiple engine industries.<sup>[5]</sup>

The region's specialisations in agriculture and tourism were impacted by stock destruction and infrastructure damage, and tourism destinations, such as national parks, being inaccessible. The region also saw significant infrastructure damage to roads, bridges, and to Nerriga Tip, a major waste management facility.<sup>[5]</sup>



## COVID-19

The COVID-19 pandemic had a notable impact on local businesses in the region, with 58% of businesses reporting that COVID-19 in general negatively affected their business.<sup>[6]</sup> Local jobs also declined, with ABS payroll data indicating jobs in manufacturing in the capital region in June 2021 were still down 7% from pre COVID-19 levels.<sup>[7]</sup>

Prior to COVID-19, international visitor growth in Queanbeyan-Palerang averaged 4.5% per annum, dropping to 3% in 2021.<sup>[8]</sup> While international visitation declined during lockdowns in 2020-2021, an increase in domestic visitation has followed since, in particular visitors from Sydney, which has supported a recovery in visitor numbers.

## Floods

Seven out of the 8 natural disaster declarations in the period 2018-2022 were caused by severe weather and floods.<sup>[9]</sup> Local infrastructure such as Araluen Road sustained damage with multiple landslips from flooding events in late 2020, 2021, and March 2022.<sup>[9]</sup> There has most recently been flood events in August to October 2022, which caused flooding of the Queanbeyan and Molonglo Rivers which closed roads and impacted local businesses and residents.<sup>[10]</sup>

## Macroeconomic trends shaping the region's future

Since 2018, the economic landscape of the region has been significantly influenced by macroeconomic related to digitisation, climate and migration. With a growing number of remote workers, the impact of successive natural disasters and an increasing push towards decarbonisation, the region faces both opportunities and challenges in building resilience and leveraging competitive advantage to maximise benefits from these trends.

Trend	Opportunities and risks
 Digital transformation	<p>The role of digital connectivity and inclusion is vital as industries increasingly rely upon robust digital infrastructure to adopt technologies that improve internal systems, reduce costs, enable greater market access, and manage businesses more effectively.<sup>[11]</sup></p> <p>Remote working and digital service provision that enables access to a greater labour pool and expands small business capacity.</p>

Trend	Opportunities and risks
	<p>The COVID-19 pandemic has also accelerated the digitisation of services and uptake of remote working. Improving digital connectivity continues to be a strategic priority for the region as an economic enabler, which would allow access to a wider labour pool, industry diversification, and global markets.</p>
 <b>Changing migration patterns</b>	<p>The continuing spread of urbanisation has seen high levels of migration to the region, increasing the demand for metro-competitive services and infrastructure. Migration to the region in combination with constrained supply of residential land in existing areas have led to increasing housing pressures.</p> <p>Despite strong population growth, the region is facing challenges associated with a significant skills shortage. Retaining young workers, especially in hospitality and other population-serving sectors, typically requires high-quality placemaking and amenity.<sup>[12]</sup></p>
 <b>Towards net zero</b>	<p>The Queanbeyan-Palerang region can play a significant role in achieving the State's Net Zero targets given its location along the renewable energy 'spine' spanning across south east NSW and its local specialisation in waste and resource recovery.</p> <p>Improving sustainable waste practices will be a crucial opportunity within Net Zero aspirations, as the region is estimated to double the amount of waste generated by 2050.</p>
 <b>Rising uncertainty</b>	<p>The region has seen a succession of extreme climate events since 2018, including drought, bushfires and floods. Climate events have had a significant impact on local infrastructure including secondary roads. With the frequency and intensity of these events projected to increase in coming decades,<sup>[13]</sup> there is a need to enhance climate resilience in the region.</p> <p>A key priority needs to be placed on building community resilience in relation to health and wellbeing, alongside that of infrastructure, so to build a solid foundation to support future growth.</p>

## 6. Responding to change: Initiatives and investments since 2018



Figure 7: Queanbeyan Golf Course and surrounding suburbs.

Since 2018, Queanbeyan-Palerang Regional Council, the NSW Government and other key organisations have delivered new and updated key 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
The <b>2041 South East and Tablelands Regional Plan</b> and <b>Draft Queanbeyan Local Strategic Planning Statement</b> provide a 20-year vision for land use and local identity to ensure sustainable growth in population and industries.	 
The <b>2019 Queanbeyan CBD Spatial Master Plan</b> and <b>Queanbeyan CBD Place Plan</b> considers the challenges that the Queanbeyan CBD currently faces and proposes solutions over a 10-year period to attract investment, improve amenity and connectivity, and embrace the digital economy and smart technology.	 
<b>Towards 2042 Community Strategic Plan</b> sets out the community's main ideas and priorities for the LGA over the next 10-20 years. On-ground implementation is supported by the <b>Draft QPRC Delivery Program 2022–26</b> sets out goals in a 4 year outlook to achieve strategic priorities that aim to deliver a prosperous, resilient, sustainable, and well-connected local economy.	  
The <b>Canberra Regional Economic Development Strategy (CREDS)</b> sets out actions to develop an economically prosperous region that provides high quality of life and is resilient, accessible and environmentally sustainable.	  
The <b>Destination Southern NSW Draft Destination Management Plan (DMP) 2022–2030</b> offers a collaborative framework to guide local, regional, and state tourism stakeholders to grow the visitor economy.	

Strategies and plans	Relevant 2018 strategies
<p>The QPRC <b>Tourism Plan</b> and Destination Southern NSW <b>Southern Tablelands Destination Development Plan 2020 to 2025</b> support the growth of the region's visitor economy, and promotes the Southern Tablelands region as a distinct new and appealing destination.</p>	
<p>The <b>Blueprint for a Resilient South East NSW</b> is being created by the Canberra Region Joint Organisation to build resilience to prevent, prepare, respond and recover from future disasters and challenges.</p>	
<p>The <b>Draft Murrumbidgee Regional Water Strategy</b> seek to address regional water challenges to support the long-term water security of the region.</p>	

## Significant investments since 2018

As shown in Figure 8, 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 developing infrastructure, which supports amenity for the local community, in particular recreation facilities and infrastructure, as well as upgrades to key transport infrastructure. Grant funding has played a key role in the delivery of many of these projects.

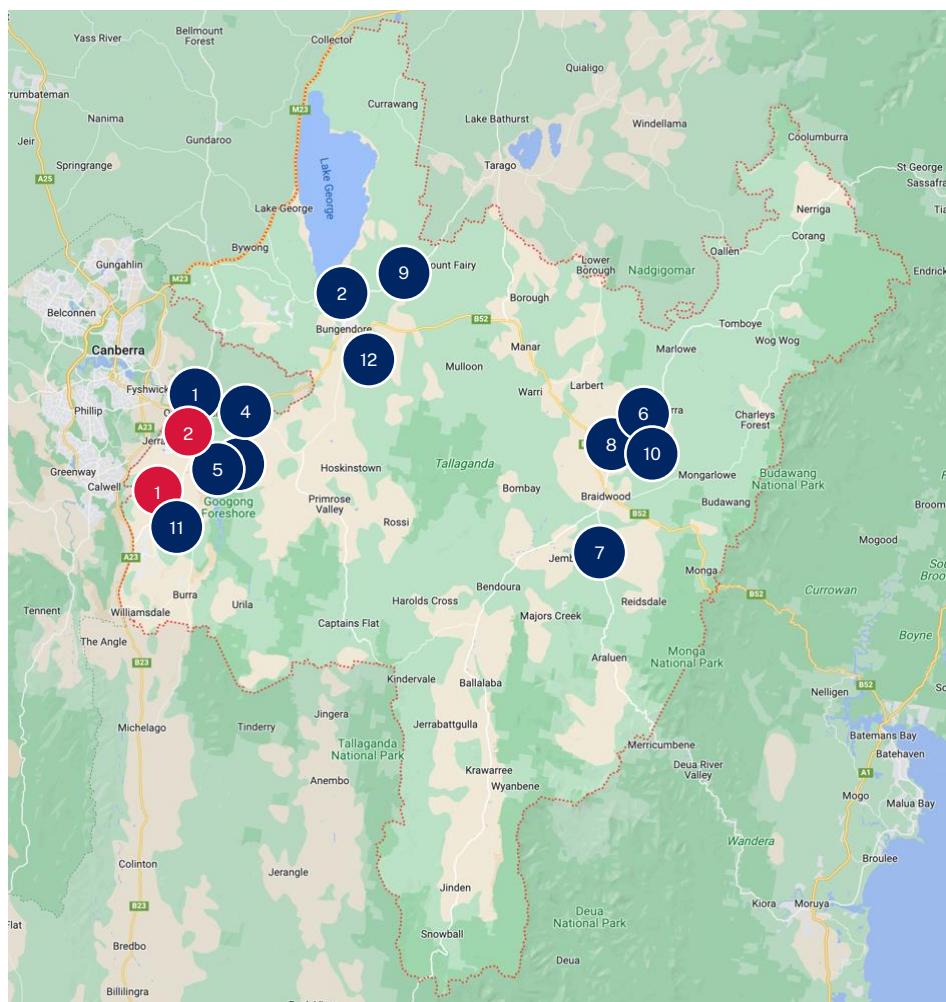


Figure 8: Investments in the Queanbeyan-Palerang region since 2018. Map data ©2023 Google.

## Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Major housing developments	Not available	
2 DCI Data Centre	Not available	

## Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Queanbeyan Civic and Cultural Precinct	\$74 million	
2 Queanbeyan and Bungendore Sewage Treatment Plant upgrades	Not available	
3 Bicentennial Hall upgrade	\$1.545 million	
4 Botanical Sister City Garden	Not available	
5 Ellerton Drive extension	\$86 million	
6 Nerriga Road upgrade	\$34 million	
7 Araluen Road flood damage repairs	\$8.87 million	
8 Braidwood Pool refurbishment	\$1 million	
9 Bungendore Sports Hub	\$6.4 million	
10 Braidwood Museum	\$2.5 million	
11 Jerrabomberra Regional Sports Complex	\$36 million	
12 Headquarters Joint Operations Command upgrade	\$31 million	

## Regional grant programs

The region has received \$68.9 million in grant funding since 2018. Projects have included upgrades to educational facilities, recreational/sporting facilities, and other community amenities.

Grant category	Approved funding
Community	\$23.6 million
Economic	\$29.3 million
Disaster recovery	\$16.0 million

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



Figure 9: Gateway to the South Jerrabomberra Regional Job Precinct.

## 7. Queanbeyan-Palerang 2023 economic snapshot

Queanbeyan-Palerang has a sustainable primary working age population but servicing future population growth may be a challenge

Although the region has seen consistent population growth since 2016 (with this trend expected to continue), there is a need to focus on developing social infrastructure which can support attraction and retention of people in their prime working age.

### Population growth

The region saw an estimated average annual population growth rate of 1.45% between 2011-2021. As shown in Figure 10, population growth was consistent between 2017 and 2020 at an average of 1.99% per year throughout the period, but the arrival of COVID-19 slowed growth between 2020 and 2021 to 1.6%.

Annual population growth is forecast to rebound in future years, with average growth of 1.5% forecast from 2021 to 2031 (1,011 people per year).<sup>[14]</sup>

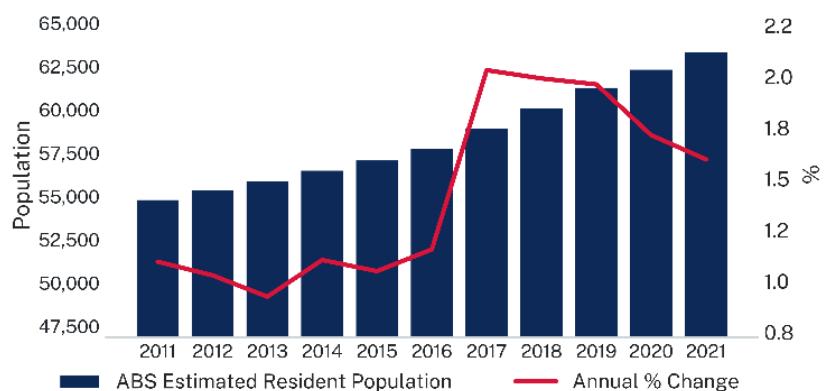


Figure 10: Queanbeyan-Palerang FER population growth, 2011-2021 (ABS ERP, July 2022).

### Demographic profile

Queanbeyan-Palerang has a strong primary working age population cohort, with only 26% of the region's population over the age of 55 compared to the NSW benchmark of 28.3% (see Figure 11). Additionally, the region has a larger proportion of residents within the 55-64 demographic who still participate in the workforce, compared to the rest of NSW, contributing to a low unemployment rate. A key focus for the region will be maintaining population growth and retaining key workers to support specialisations in public administration and other population-serving jobs.

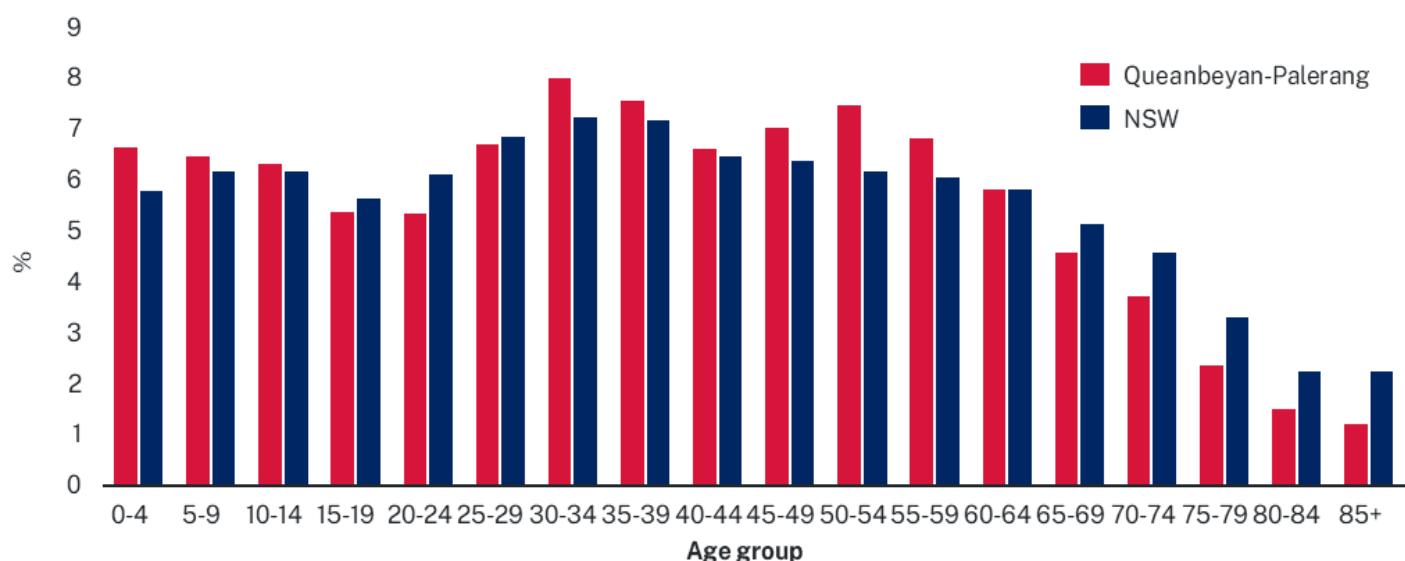


Figure 11: Queanbeyan-Palerang FER population by age, 2021 (ABS ERP, July 2022).

## Housing supply in the Queanbeyan-Palerang is currently not meeting demand

The region has faced a decline in housing availability and affordability since 2018. This may create challenges given projected population growth in the region (see page 18), as well as increased worker housing (and tourist accommodation) demand brought about by planned major projects. 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 12 below, the residential vacancy rate in the South Eastern NSW region has tightened significantly since 2020, having fallen from 3.5% in March 2020 to 2.1% in August 2022, with COVID-19 related migration of remote workers to the region likely a key factor.

Residential building approvals in the Queanbeyan-Palerang region fluctuate greatly, with no evident increase in-line with increased demand for housing brought about by a growing population. While there is always a degree of lag between supply and demand for housing, there is a need to ensure that state and local planning systems (and other land development enablers such as infrastructure provision) are appropriately calibrated to keep pace with projected demand for housing.

### Housing affordability

Between June 2018 and June 2022, median house prices in the region increased by 39%, from \$645,000 to \$895,000.<sup>[15]</sup> Similar to many parts of regional NSW, heightened demand has translated in the Queanbeyan-Palerang region into significant growth in house prices, which may act as a constraint for the region in attracting and retaining workers.

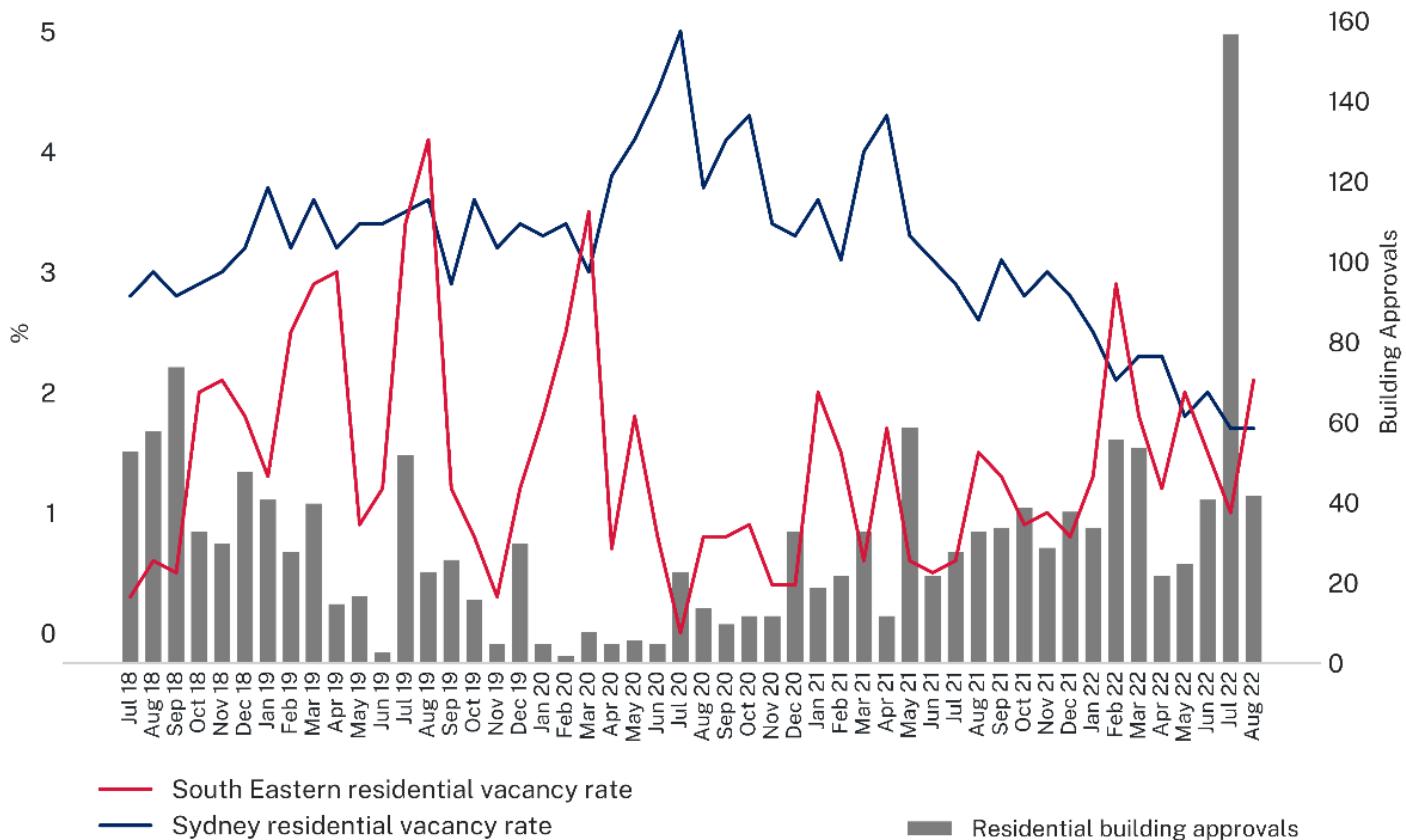


Figure 12: Queanbeyan-Palerang FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Fluctuations in the south-eastern region are also partially attributable to seasonal variations. These results are therefore intended to provide an indication of housing vacancies in the region.

## Significant growth in the number of job vacancies has been observed since 2018

A constrained labour market has been a key issue for the Queanbeyan-Palerang region since 2018, with job vacancies more than doubling across this period in the region despite major shocks to industry.

### Employment

The Queanbeyan-Palerang region has continued to record strong employment outcomes since 2018, with unemployment consistently below the NSW average (see Figure 13). This held throughout the pandemic, with only a gradual increase in the unemployment rate from March 2020 through to the end of 2021. As at June 2022, the unemployment rate in the region is 2.8%, below the NSW rate of 3.3%.

From 2011 to 2021, the total number of jobs in Queanbeyan-Palerang jobs decreased on average by 0.1% per annum, in contrast to the average 0.4% per annum increase in regional NSW. However, from late 2020, local jobs growth and a skills shortage has resulted in a record number of job vacancies, as shown in Figure 14. This is consistent with nation-wide trends and partially stems from international border closures.

Labour market constraints during the pandemic saw an uplift in demand for workers. Top job vacancies in the region included carers and aides, administrative staff, medical practitioners and sales assistants. This demand has continued after lockdowns.

### Aboriginal employment

The Aboriginal unemployment rate in the Queanbeyan-Palerang region was 5.8% in 2021, a significant improvement from the 2016 rate of 9.3%. The Queanbeyan-Palerang rate is well below the state-wide average Aboriginal unemployment of 9.8%, but above the NSW-wide unemployment rate of 4.9%.

Aboriginal unemployment rate: Queanbeyan-Palerang	2011	8.2%
	2016	9.3%
	2021	5.8%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021

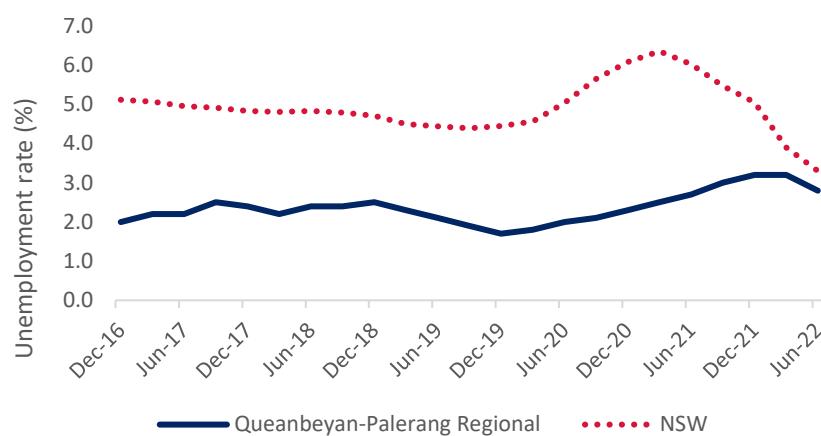


Figure 13: Queanbeyan-Palerang unemployment rate (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 14: Job vacancies, Southern Highlands & Snowy 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 noting these limitations.

# Queanbeyan-Palerang 2023 engine and emerging industries

Queanbeyan-Palerang is a \$2.55 billion economy with diverse local industry strengths in industrial, knowledge and population-serving sectors. The relative strength of industries in Queanbeyan-Palerang are highlighted through location quotient (LQ) analysis<sup>1</sup> in Figure 15 below, where the size of the bubbles correlates to industry size.

## Engine industries

Despite significant shocks since 2018, the region's engine industries have remained a source of stability, delivering ongoing growth and making a significant economic contribution.

**Public administration and safety** has continued to be a significant specialisation for the region (Location quotient [LQ] of 2.9), driven by a large local defence industry (LQ of 7.5) which contributed \$267m to the local economy in 2020. Public administration and regulatory services (LQ of 1.7) contributed \$159m.

**Agriculture** is also a key engine industry, driven largely by livestock production in Braidwood, with cattle the leading commodity in the region. This sector has seen strong average annual growth of 9.7% since 2011, and is expected to continue over the long-term.

Despite broad-based decline in the industry over the past decade, in line with NSW and nationwide trends, **manufacturing** continues to be an engine industry for the region, contributing \$151m to the regional economy in 2020.

Although an enabling industry as opposed to an engine industry, **construction** is the other core pillar of local specialisation (LQ of 2.1) with broad based output across sub-industries, including construction services (LQ of 2.6), heavy & civil engineering construction and non-residential building construction.

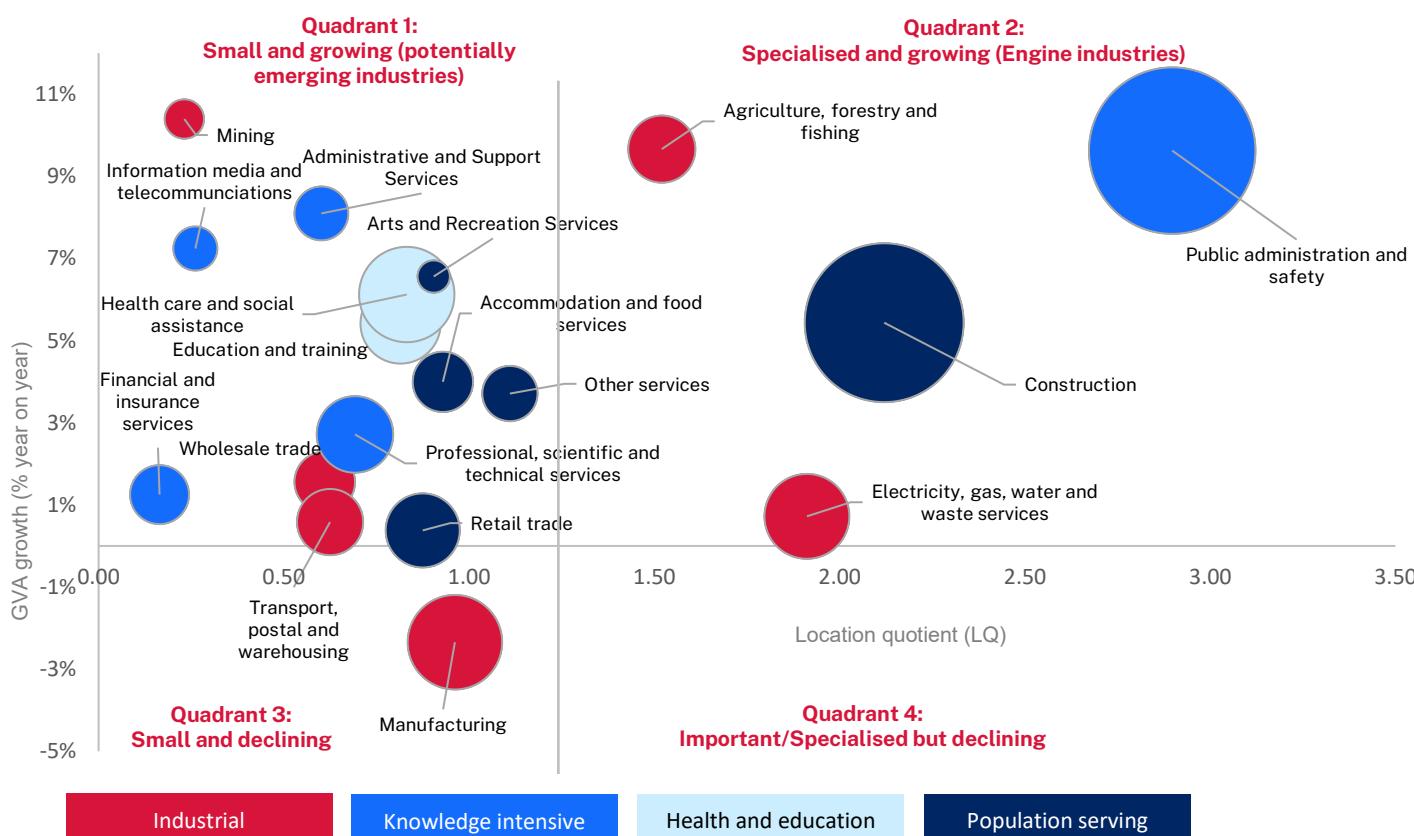


Figure 15: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMLAN, 2011; REMLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2022 update has used gross value-add (GVA) data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

<sup>1</sup> 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. Emerging industries for the Queanbeyan-Palerang region are largely in knowledge-intensive sectors. Supporting growth in these sectors will be key to building a diverse and resilient economy which can support projected population growth while maintaining a high standard of liveability.

**Knowledge intensive industries** such as information, media and communications have been growing at around 7 to 8% on average per year between 2011 and 2020 (see Figure 15), representing growth sectors for the region going forward. Telecommunications and computer systems & design related services represent a promising sector for the region. In addition, given the region's proximity to the ACT's highly skilled workforce, the region is likely to benefit from significant opportunities in the defence, space and high tech industries, which can leverage off the significant investment being made into the South Jerrabomberra Regional Jobs Precinct.

The **tourism** sector demonstrates growth potential, with estimated visitor spend of \$93 million in 2021.<sup>[16]</sup> In particular, food & beverage services contributed 79% (\$49m) to the accommodation and food services sector GVA in 2020. Within arts and recreation services, Queanbeyan-Palerang has a specialisation in heritage, creative & performing arts (LQ of 1.3). The region also has emerging food manufacturing that could support diversification of visitor economy offerings.

**Healthcare and social assistance** demonstrates strong growth potential as an enabler of economic and population growth for the region with average annual growth of 6.1% between 2011 and 2020. Residential care represented 55% of total output (\$85m) in the sector in 2020.

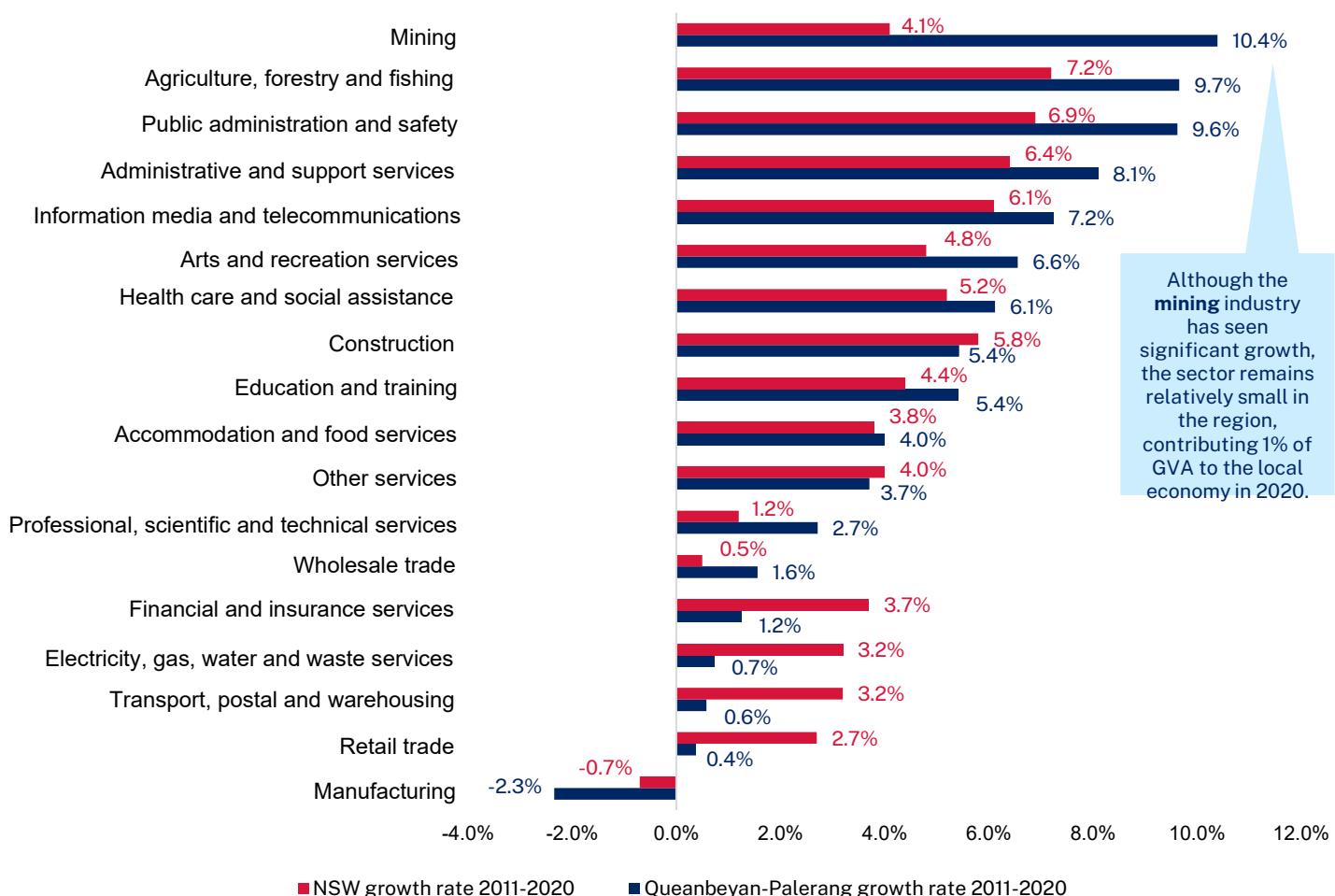


Figure 16: Change in GVA by industry (% YOY), 2011-2020 (REMLAN, 2020).

# Queanbeyan-Palerang 2023 endowments

## Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Queanbeyan-Palerang's economy and regional competitiveness (see page 11 for the complete list from the 2018 REDS). Despite recent shocks impacting many key endowments, consultation affirmed that most of them remain valid, with key endowments including:

- proximity to Sydney and Canberra
- gateway to Snowy Mountains and South Coast
- airport, rail and highways
- arable land, forests, and National Parks
- Queanbeyan Regional Hospital
- local culture, heritage and food and drink specialities
- Federal and State Government presence in the region

Given current skills shortages, a range of 'diverse skills' is considered to no longer form part of the region's key endowments and has been removed. However, new endowments set the stage for future economic opportunities and specialisations, as outlined below.

## 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.

- + South Jerrabomberra Regional Job Precinct

A hub for defence, space, cyber-security, information technology, and scientific research sectors

- + Queanbeyan Civic & Cultural Precinct

The new precinct is being constructed in the heart of Queanbeyan, and will attract workers and stimulate activity in the Central Business District



Figure 17: Indicative render of the Queanbeyan Civic and Cultural Precinct (Image credit: Donald Cant Watts Corke).

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

### Opportunities and vulnerabilities in engine and emerging industries

#### Construction

Queanbeyan-Palerang's strength in construction continue to demonstrate strong growth potential. Locating viable lands for further development and enhancing supply chain resilience will be crucial to further growth in this sector.

GVA (2020, \$m)	423
Employment (2021)	4,024
LQ score (2020)	2.12
LQ Construction Services (2020)	2.6
LQ Non-residential (2020)	1.9

#### Strengths

- Construction provides a key source of business income for Queanbeyan.
- Housing construction plays a major role in the region's economic activity, reflecting its role as a key service provider to the ACT.
- Construction services contributes 62.5% (\$265m) of GVA within this industry, derived from activities such as site preparation, building structure, installation, building completion and other landscaping services.

#### Vulnerabilities

- Queanbeyan-Palerang's construction industry is the one of the leading sources of demand for imports for production processes. Recent and ongoing supply chain issues and rising cost of inputs and energy are affecting the financial viability and feasibility of developments.
- The shortage of appropriately priced and scoped lands from competing land uses are stagnating residential and commercial development opportunities. The industry was also impacted by restrictions and downturns in construction commencements as a result of COVID-19.

#### Opportunities

- Major road and infrastructure upgrades, particularly for major b-double routes in the region will be critical to the resilience of the freight network. Enhancing and ensuring the accessibility of freight trucks to and from the region will help to mitigate supply chain risks.
- Revision of land zoning and additional land release can improve residential and commercial development opportunities.

## Manufacturing

Queanbeyan-Palerang's manufacturing sector is set to grow following several major infrastructure investments. The resilience of supply chains and the ability to attract and retain highly skilled workers will be crucial to the prosperity of this sector.

GVA (2020, \$m)	151
Employment (2021)	1,180
LQ score (2020)	0.96
LQ Wood manufacturing (2020)	4.6
LQ Plaster & concrete (2020)	3.4

### Strengths

- Queanbeyan-Palerang manufacturing sector is driven by highly specialised sub-sectors including wood, plaster and concrete, and fabricated metals used for mass consumption.
- Wood product manufacturing and fabricated metal manufacturing both employ 5 times as many workers as the NSW average.<sup>[1]</sup>

### Vulnerabilities

- The manufacturing sector is susceptible to supply chain disruptions, fluctuations in energy supply, input and freight transport costs, as well as workforce shortages.
- Manufacturing has experienced a broad-based decline in output over the past decade with a -2.3% average annual YOY growth rate, in line with the trend across NSW and Australia as manufacturing is moved offshore.

### Opportunities

- Issues with supply chain resilience has prompted a focus on developing sovereign manufacturing capabilities.
- Investment in the South Jerrabomberra Regional Job Precinct and Satellite Manufacturing Hub present opportunities to activate advanced manufacturing in the defence, cyber security and space industries.
- Collaborating with local education institutions such as Queanbeyan TAFE to provide skills training to match emerging specialised employment opportunities.
- Investments in enhancing major freight connections and improving rail linkages to and from the region will mitigate supply chain risks.

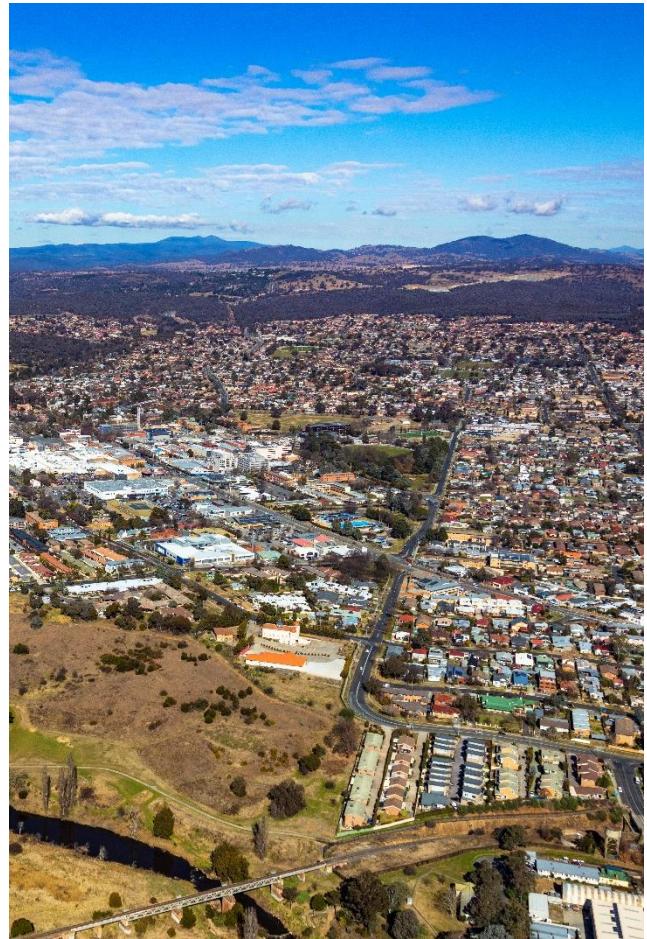


Figure 18: Aerial view of Queanbeyan.

## Tourism

Queanbeyan-Palerang's unique visitor economy offering provides clear opportunities for future growth in the tourism sector through leveraging the region's endowments, including the natural environment and well-preserved heritage.

Visitor spend (2021, \$m) <sup>[16]</sup>	93
Employment (2021) <sup>a</sup>	4,693
LQ score (2020) <sup>b</sup>	0.92
LQ Food & beverage (2020)	0.9
LQ Heritage, creative & performing arts (2020)	1.3

a Summation of ANZSIC 1 Digit Retail Trade, Accommodation and Food Services and, Arts and Recreation Services.

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

### Strengths

- Queanbeyan's proximity to Canberra allows it to leverage opportunities in the provision of visitor economy services, including accommodation and satellite events that support the ACT visitor economy.
- Braidwood has maintained strong, visible and practical ties to its heritage, offering a unique 'brand' for local businesses and a distinct visitor economy offering. Together with its surrounding villages, Braidwood attracts visitors and is an important stop-over destination providing services to travellers along the Kings Highway, between Canberra and the coast.

### Vulnerabilities

- The industry is vulnerable to externalities. This has been demonstrated since 2018, with bushfires damaging or destroying national parks and transport infrastructure, while COVID-19 pandemic restrictions reduced visitation and spend in the region.
- There are negative or outdated perceptions of the visitor economy offerings in parts of the region.
- There is a lack of visitor accommodation options in parts of the region.

### Opportunities

- Product investment in visitor offerings in recreation and lifestyle, such as the Capital to Coast Walking Trail, the Jerrabomberra Regional Sports Precinct, rail trails, improvements to National Park visitor infrastructure, and agritourism opportunities can help diversify the region's visitor economy.
- Facilitating investment in improved and new visitor products and experiences, and building linkages through packaging between accommodation and other visitor economy products including events.
- Ensuring reliable digital connectivity for travellers and sufficient accommodation stock through appropriate planning regulation will increase the appeal of the region.
- Enhancing nature-based tourism opportunities in the region's national parks.
- Increasing activation and branding of town centres and CBDs to improve the visitor experience.

## Agriculture

Long-held strengths in the agriculture sector present significant opportunities for alignment and growth, particularly in light of the region's well-established transport links.

GVA (2020, \$m)	77
Employment (2021) <sup>a</sup>	553
LQ score (2020)	1.52
LQ Sheep, grain beef & dairy (2020)	1.9
LQ Other agriculture (2020)	0.8

<sup>a</sup> ANZSIC Level 1 industry for agriculture, forestry and fishing.

### Strengths

- Livestock and livestock products account for 90% of local agricultural production.
- Cattle production is concentrated in Braidwood, with wool and sheep production predominant in the rest of the region.
- The arable tracts of land around Braidwood ensure it is a leading location for agricultural production, particularly cattle and other livestock.

### Vulnerabilities

- The industry relies upon the availability of land and viable climatic conditions for production, both of which may present vulnerabilities in the face of rising incidence of extreme climate events. Many farms are rebuilding stocks following years of bad weather conditions and high turn-off rates.
- Macroeconomic factors beyond the control of producers may influence supply chains and commodity prices and therefore influence the final value of outputs.

### Opportunities

- Diversification of the agricultural sector beyond the livestock specialisation will be crucial to building resilience and ensuring future growth. Burgeoning niche markets such as black garlic and truffle industries as well as regenerative farming present high value-add opportunities.
- Collaboration with educational institutions can deepen the region's specialisation and support innovations in agtech. Opportunities may exist for longer term initiatives such as establishing an agricultural college in the region, potentially in collaboration with existing educational entities such as Queanbeyan TAFE.
- Vertically integrating the agricultural production chain from farm to table can expand the region's agritourism offerings, with a focus on engaging with regional producers and growers to recognise and take advantage of the significant opportunity agritourism represents.
- Investment in freight routes including the Monaro Rail Trail, Tarago Road and Kings Highway upgrades are crucial in mitigating supply chain risks and ensuring the movement of the region's agricultural inputs and products.

## Public administration and safety

Long-standing, established employment opportunities in public administration and safety will likely remain a key strength for the region, which benefits from its strategic location.

GVA (2020, \$m)	464
Employment (2021)	9,114
LQ score (2020)	2.9
LQ Defence (2020)	7.5
Defence employment (2021)	2,660

### Strengths

- Proximity to Canberra, which facilitates access to extensive employment opportunities in the Australian Public Service.
- The Queanbeyan-Palerang region is the location of several significant defence assets, including the Headquarters Joint Operations Command near Bungendore.
- Queanbeyan acts as a regional hub for NSW Government Departments servicing the south east region of NSW.

### Vulnerabilities

- Queanbeyan-Palerang faces competition with the Federal and ACT Governments in Canberra to attract skilled workers to fill roles in the public sector.
- Employment levels in the public administration and safety sector are significantly influenced by external stakeholders such as the Federal Government, which means employment numbers are impacted by factors outside of the region's control.
- Prolonged disruptions or damage to transport infrastructure, such as damage caused by natural disasters could undermine the perception of the region as being within commutable distance of Canberra.

### Opportunities

- The South Jerrabomberra Regional Job Precinct will create a hub of defence, space, cyber-security, information technology and scientific research sectors and create a diverse range of employment opportunities in the region.
- Efforts to improve liveability and public amenity in settlements in the Queanbeyan-Palerang region have the potential to attract additional residents and visitors from the significant pool of workers and their families currently located in the region's surrounds.

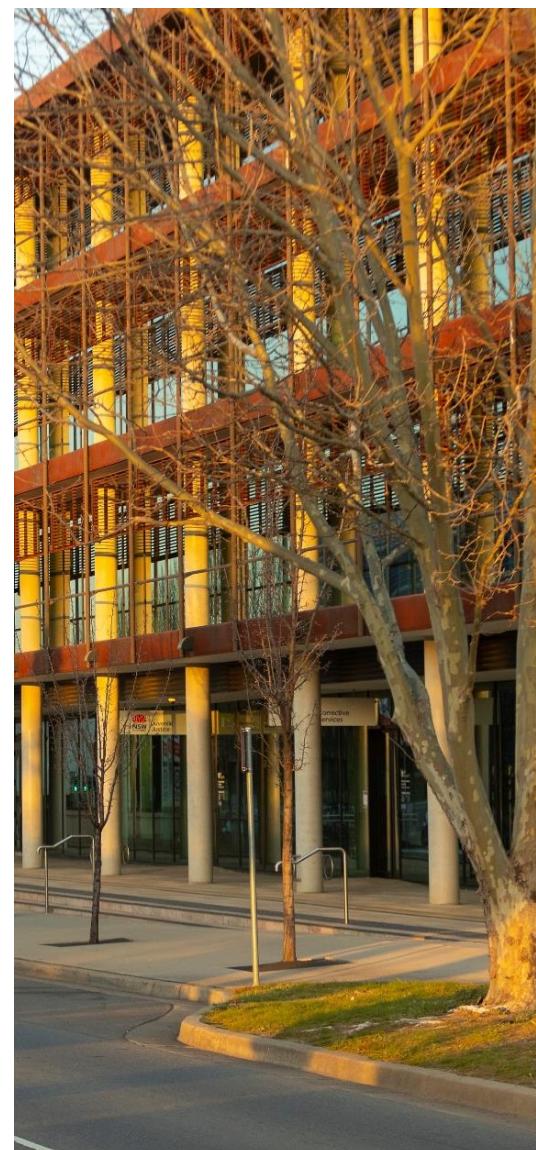


Figure 18: NSW Government offices in Queanbeyan.

## Key themes in stakeholder consultation

Stakeholders from the Queanbeyan-Palerang region noted the area is facing both challenges and opportunities related to its population growth, while recent natural disaster events, particularly bushfires in 2019-20, have brought to the fore the need to build community and infrastructure resilience against likely future shocks.

Stakeholders also expressed concerns over the availability and affordability of housing in the area to support population and workforce attraction aspirations, as well as the disconnect between those using local services and infrastructure and those contributing to the local economy through local employment.

### Housing availability and affordability

As is reflected in analysis of housing supply and prices in the region (see page 19), consultation input revealed concerns among 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.

### Strategic collaboration

Local stakeholders have highlighted the need for greater collaboration between QPRC and the ACT Government, so to maximise the economic potential and liveability of the region, build supply chain resilience and enhance cross-border arrangements.

### Skilled local workforce

Stakeholders noted that despite population growth, finding skilled workers remained a challenge for local businesses. Building local skills capacity within the population to support the availability of key workers was highlighted as a key priority for the region.

## Queanbeyan-Palerang REDS – 2023 Update strategies

The 2018 strategies broadly remain relevant to Queanbeyan-Palerang. However, the need to prioritise economic resilience by growing and enhancing the region's skilled labour base was highlighted by stakeholders as a key priority, alongside a focus on improving the reliability of enabling infrastructure and telecommunications.

Updates to the strategies have been made to highlight the region's specialisation in manufacturing, the need to attract skilled labour to meet growing industry demands, and to create a focus on enhancing cross-industry and cross-border collaboration. This will be particularly important in supporting precinct development and the expansion of digital capability of local businesses.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Queanbeyan-Palerang region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Amended	Improve the digital connectivity and access to harness the innovative capacity of the workforce <b>and local businesses</b> .
Amended	Re-establish the town centres as <b>lively neighbourhoods and public spaces</b> .
Amended	Sustainably grow the population and <b>develop a skilled workforce suited to internal market needs</b> .
Amended	Further develop specialised agriculture, <b>manufacturing</b> , and food and cultural tourism.

## 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
<b>Improve the digital connectivity and access to harness the innovative capacity of the workforce and local businesses.</b>	Infrastructure	Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.	<b>NSW Telco Authority;</b> QPRC; Department of Regional NSW (DRNSW)	Enable growth and productivity through greater digital connectivity.
	People and skills	Invest in business mentoring and ongoing support to increase digital literacy around opportunities and pathways to grow digital channels.	<b>QPRC</b>	
<b>Re-establish the town centres as lively neighbourhoods and public spaces.</b>	Infrastructure	Invest in place planning to develop and activate community spaces that enhance social and economic outcomes.	<b>QPRC; DRNSW</b>	Create a vibrant place and expand economic opportunities.
		Work with local government to strategically plan for housing supply through a Regional Housing Delivery Plan, focussing on development within existing centres where supported by existing strategic plans.	<b>DRNSW;</b> Department of Planning and environment (DPE); QPRC	Enable growth and productivity by providing housing for workers.
	Services	Review the existing public transport network and investigate new bus services between the town centre and residential areas.	<b>Transport for NSW (TfNSW);</b> QPRC	Enable access to town centre.

Strategy	New Enablers	Lead and support	Rationale
<b>Sustainably grow the population and develop a skilled workforce suited to internal market needs.</b>	People and skills	Conduct a skills demand and local supply analysis to support the Regional Job Precinct, including consideration of opportunities to leverage the Precinct's proximity to the ACT's highly skilled workforce.	<b>Department of Education;</b> DRNSW; Training Services; RDA Southern Inland, TAFE NSW; Office of the Cross Border Commissioner (OCBC); QPRC
	Infrastructure	Collaborate with the ACT Government and Queanbeyan-Palerang Regional Council to investigate a coordinated, strategic approach to cross-border infrastructure, road connectivity and public transport connections to strengthen access to labour, health and education.	<b>TfNSW;</b> Transport Canberra; OCBC; QPRC
		Investigate water security needs to inform further investment in water infrastructure, including the progression of initiatives to secure long-term water security for Bungendore.	<b>QPRC;</b> DPE Water
<b>Further develop specialised agriculture, manufacturing, and food cultural tourism.</b>	Business	Facilitate investment in commercial opportunities to support the Monaro Rail Trail and passenger road connectivity for improved visitor access.	<b>DRNSW;</b> Destination NSW; Destination Southern NSW; QPRC
	Infrastructure	Investigate land use zonings to activate and support an advanced manufacturing ecosystem.  Consider coordinated strategic planning with the ACT in light of new rezoning around Queanbeyan and ACT border.	<b>QPRC;</b> DRNSW; DPE; ACT Government

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