

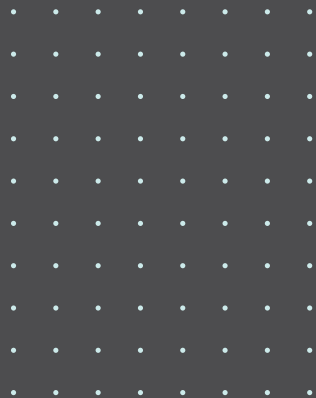


Australian Government



STATE OF AUSTRALIA'S REGIONS 2024

FEBRUARY 2024



Acknowledgement of Country

In delivering the *State of Australia's Regions 2024* report, we pay our respects to First Nations people and Elders who have enduring connections to lands, waters and communities.

First Nations people have the oldest continuing cultures in the world. It is fitting to reflect on the thousands of generations of traditional knowledges that First Nations people hold, and generously share.

We acknowledge the diversity of First Nations cultures, languages and practices across the country and the resilience of First Nations people in keeping these alive. In supporting strong and sustainable regions, we recognise the importance of listening to the voices and perspectives of local First Nations people and responding to the uniqueness of each place.

We are committed to working in genuine and long-term partnership with First Nations people – in meeting current and future challenges and achieving opportunities, including through smart and responsible regional investment.

We thank First Nations people for their continuing custodianship of, and care for, the Country that we live and work on today.



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FOREWORD

Supporting strong, secure and sustainable regions is an Australian Government priority.

Regional Australia has always been central to the productivity, vitality and prosperity of our nation. With millions of Australians choosing to call them home, Australia's diverse regional communities support people and families to live vibrant and rewarding lives – with opportunities for employment and unique qualities that support enhanced wellbeing and quality of life.

Australia's regions also play a crucial role in ensuring national prosperity – adapting to seize the potential of an ever-evolving world. Whether it is agriculture, resources, tourism or manufacturing – regions are drawing on their knowledge, insights and natural assets to harness emerging opportunities for inclusive and sustainable growth.

The Australian Government recognises our regions underpin the strength of our nation. In establishing the Regional Investment Framework as a key element of the 2023-24 Budget, our Government confirmed its commitment to Australia's regions. Through the Framework, we support communities across the country to be liveable and dynamic, help build productive economies and good jobs through future-focused industries, and work collaboratively to untap the vast potential of our diverse regions. We know how important this will be to successfully navigating a period of global economic transformation and environmental change.

Now and over the years ahead, in-line with our Regional Investment Framework, it is crucial we take an informed approach. We need to understand both the pressures on, and the potential of, our diverse places, and compile the intelligence, insights and evidence needed to support decisions that maximise outcomes for regions and their people.

It is our pleasure to present the Albanese Government's 2024 *State of Australia's Regions* report. Showcasing data and insights on key issues impacting Australia's regions, these regular reports will support evidence-based decision making through the Regional Investment Framework – ensuring that investments and initiatives across the whole of government respond to what the data is showing, and what people in the regions are saying.

The issues that impact Australian regions are broad and diverse. This 2024 report focuses on the most contemporary and pressing issues, including: ensuring regional workforces are positioned to meet the needs of today and tomorrow; supporting places with amenity, services and opportunities; collaboratively addressing issues like housing availability and affordability and access to quality early childhood education and care; and responding to challenges and opportunities as we transition to a net zero emissions future. All levels of government play an important role in securing outcomes across these areas – continued engagement and commitment is essential, with a focus on coordination with the states and territories, and supporting local government capability and capacity.

The 2024 report has been shaped by engagement with a broad range of regional stakeholders. It draws on a variety of insights and intelligence from the local level, as well as knowledge and data from respected sources such as the Australian Bureau of Statistics (ABS), the Regional Data Hub, and the Regional Australia Institute.

As we continue to work together towards vibrant and prosperous futures for our regions, we trust *State of Australia's Regions 2024* both informs and inspires. By considering the data and evidence, better understanding the issues that matter most, and learning how regions have successfully responded to challenges and harnessed opportunities – through this and future reports – we can collectively take informed

action that helps keep regional communities and economies strong, dynamic and sustainable through and beyond this defining decade.

CATHERINE KING

Minister for Infrastructure, Transport,
Regional Development and Local Government

KRISTY MCBAIN

Minister for Regional Development,
Local Government and Territories

FEBRUARY 2024



INTRODUCTION

A robust evidence base is fundamental to informed, impactful regional investment.

State of Australia's Regions 2024 is a valuable new addition to the collection of knowledge, insights and intelligence on Australia's regions – providing the latest context and evidence base crucial to realising the full potential of regional Australia and supporting the delivery of better outcomes on the ground. It makes an important contribution to informed decision making through the Australian Government's Regional Investment Framework.

This report has been shaped by engagement with regional communities and stakeholders, including through consultation with Regional Development Australia (RDA) committees, engagement across the local government level, including through the first Australian Council of Local Government in over a decade, and an extensive range of Ministerial roundtables and bilateral discussions with a diverse collection of representatives from regional communities, industry sectors, and research groups.

Given the diversity of regions and the breadth of issues that can have impacts at the local level, State of Australia's Regions 2024 is targeted to provide a snapshot of life in Australia's regions at a point in time, focusing on current priority issues for regions, rather than providing an exhaustive catalogue of data and evidence on all regional issues. It contributes to the range of data and evidence targeted to regional Australia – an extensive suite of products demonstrating the Government's commitment to building the quality and accessibility of the regional evidence base, for example:

- The **Regional Data Hub** provides an extensive and constantly evolving source of regional data and insights. Covering a broad range of topics, the Regional Data Hub features an easy to use data catalogue, interactive dashboards and maps, as well as educational materials for users.
- The **Progress in Australian Regions and Cities Dashboard** brings together data across a range of geographic boundaries and themes – including labour market, infrastructure, housing, economic activity, environment, demography and wellbeing.
- The Government's new **Measuring What Matters framework** is tracking progress towards a more healthy, secure, sustainable, cohesive and prosperous Australia, with indicators available through an online dashboard that will be updated annually and evolve over time.
- Geoscience Australia's **Digital Atlas of Australia** is an interactive online platform that brings together, curates and connects trusted national datasets from across government.
- The **ABS** continues to provide a broad variety of data across the spectrum of Australia's statistical areas. This includes a range of time series data.
- **Regional Ministerial Budget Statements** will continue to provide extensive detail on the Government's investments across regional Australia, released at each Federal Budget.



State of Australia's Regions 2024 sits alongside a range of complementary initiatives that provide early examples demonstrating the Government's Regional Investment Framework in action, for example:

- The 2023 Commonwealth **Closing the Gap Implementation Plan** demonstrates the Australian Government's commitment to working in partnership with communities to advance improvements in the lives of Aboriginal and Torres Strait Islander people through tangible, practical and specific actions.
- The revised **RDA Charter** (2023) is bolstering the role of RDA committees in supporting delivery of the Framework – working with a broad range of stakeholders and sectors across people, places, services, and industries and local economies.
- The flagship **Growing Regions and regional Precincts and Partnerships programs** are being delivered with transparency, integrity and fairness – for example the Growing Regions Program includes an application process that ensures funding is awarded on the basis of merit and for projects aligned with regional priorities.
- The Government is investing in targeted measures to **strengthen Medicare** and make it easier to access affordable, high-quality care across Australia and its regions. This includes **tripling Medicare bulk billing incentives**, and establishing **Medicare Urgent Care Clinics** across Australia, including 10 clinics in regional areas.
- The Government is coordinating across governments to deliver joined-up outcomes, including by working with state and territory governments to agree **National Transformation Principles** for an orderly transition to a clean energy future for Australia and its regions, a new **National Skills Agreement** that embeds national cooperation and strategic investment in the vocational education and training sector, and the **National Housing Accord** to deliver more secure and affordable housing.
- The Government is working to position Australia for the future, in priority areas across the economy and society. For example, **Working Future: The Australian Government's White Paper on Jobs and Opportunities** outlines the Government's vision for a dynamic and inclusive labour market where people, businesses and communities thrive.
- The Government is also developing a new **National Urban Policy**, which will establish a vision to ensure growth in cities, including large regional cities, is sustainable. The National Urban Policy will be complemented by **State of the Cities** reports, which will pull together an accurate picture of life in Australia's cities.

Consistent with long-standing practice in relation to regional data, *State of Australia's Regions 2024* does not prescribe a single statistical definition of 'regional Australia'. Instead, the report presents the data and evidence most suitable to reflect the various ways 'regional' is considered across areas of Government investment.

As Australia and its regions navigate a period of transformation with a focus on delivering positive change, it is vital governments, industries, and

communities have the information required to support evidence-based planning, prioritisation and investment. As the Australian Government works with communities and other levels of government to secure strong and sustainable regions across Australia, *State of Australia's Regions 2024* will contribute to guiding efforts under the Government's Regional Investment Framework – supporting targeted, effective and efficient regional investment that works better for people and for regions.



KEY INSIGHTS

People



All types of regions experienced population growth in 2021–22, with the long-term trend showing regional population growth is concentrated to coastal cities.



While there are significant opportunities for work, many regions are finding it difficult to meet their local workforce demands. Job advertisements in regional Australia more than doubled over the four years to October 2023.



Close to 60 per cent of First Nations people live outside of Australia's major cities, with 43.8 per cent living in inner or outer regional areas, and 15.4 per cent living in remote or very remote areas.

Places



Targeted infrastructure investment is required to respond to trends and opportunities. For example, freight transported on regional roads has grown each year over the past decade, from 154.2 billion tonne-kilometres in 2012–13 to 187.7 billion tonne-kilometres in 2022–23.



While for most of the past two decades households in regional Australia were able to save a housing deposit faster than those in capital cities, it now takes 9.7 years in regional Australia, only slightly less than the 10 years it takes in capital cities.



The severity and frequency of droughts, and natural hazards including bushfires, heatwaves, storms and floods, are increasing as a result of climate change. In 2023, 43 disasters were declared across Australia, impacting 137 Local Government Areas.

Services



The metro-regional gap in digital inclusion is narrowing, down from a score of 5.5 in 2021 to 5.0 in 2023, as measured by the Australian Digital Inclusion Index.



Access to high-quality health, aged care, disability and community services is an ongoing challenge, particularly as remoteness of a region increases. New models of service delivery and innovative approaches are helping to address these challenges.



The availability of quality Early Childhood Education and Care is lower in regional and remote communities compared to major cities. Estimates suggest four in five children in remote Australia live in areas with fewer than one centre-based day care place per three children.

Industries and local economies



Occupations key to the clean energy workforce will need to increase by around 30 per cent, or around 213,000 workers, by 2033. Growth in employment from the net zero transformation is likely to be stronger in regional Australia than metropolitan Australia.



The value of agriculture, fisheries and forestry production has increased substantially in the past three years. 2020–21 to 2022–23 together present the three highest production value years on record.



There are more than 100,000 tourism-related businesses across the regions. Tourism in regional Australia surged following the COVID-19 pandemic, offering opportunities for regional businesses to harness interest from travelers.



PEOPLE







People are at the heart of regional Australia. By providing opportunities – and fostering vibrant and inclusive communities – more people can call regional Australia home.

With considerable employment opportunities across regional Australia, the subsequent challenge to meet local workforce demands is a consistent message being heard from many regions, including through the RDA network. Broader transformations underway in the economy will require the future labour market to be more adaptable, with the education and training systems equipping people with the skills needed to grow the care economy and maximise opportunities from digital and net zero transformations.¹

Regions are deploying their own locally tailored workforce solutions, including investing in skills, developing pathways to employment for young people, and supporting international migration. A recent study by the Regional Australia Institute identified a range of strategies being used in regions to support cohorts experiencing challenges connecting with employment opportunities, such as train-the-trainer approaches to support training delivery in local communities, and supporting informed education and career choices by offering an early, practical understanding of what it could be like to work with local employers.²

Regions also provide opportunities to promote wellbeing through connection and culture for people from all backgrounds. In particular, regional Australia has an important role to play in promoting the economic aspirations, cultures and languages of First Nations people for the enrichment of the entire community.

Population – growth along the coast

Regional Australia is home to about a third of the Australian population.³ The population story varies across the country and between regional areas. All types of regions experienced population growth in 2021–22, with the long-term trend showing regional growth is particularly concentrated to coastal cities (Figure 1).^{4, 5}

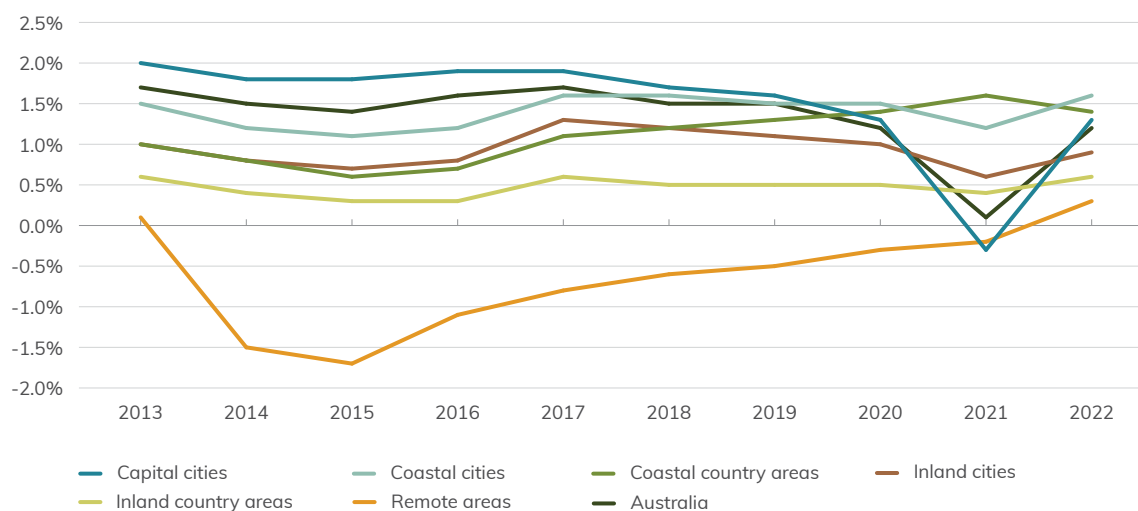
Travel restrictions imposed from the COVID-19 pandemic undoubtedly had a short-term effect on population movements, particularly in 2020–21. However, both capital cities and regions appear to be returning to pre-pandemic trends.^{6, 7}

The story also varies by demographics (Figure 2). The lifestyle appeal of coastal regions tends to attract people in older age categories, whereas young people aged 15–24 tend to leave regions for the capital cities, reflecting the pursuit of education and employment opportunities.^{8, 9, 10}

“Tasmania traditionally has a very low population growth and much of the inflow are retired or semi-retired people. COVID rapidly increased our growth, in most major centres we reached 2030 or greater pre COVID population targets. This appears to now be reverting to more traditional very low growth trajectories and an older demographic.

RDA TASMANIA (TAS)

Figure 1: Annual population change, 2013 to 2022



Source: Bureau of Communications, Arts and Regional Research (BCARR) analysis of ABS August 2023, Regional Population. Annual change to June in each year, Norfolk Island added to population data from 2016.

Figure 2: Net internal migration by age, 2016 to 2021



Source: BCARR analysis of ABS Census of Population and Housing 2021, TableBuilder





Understanding both the size and demographics of a region's population is important to ensure the right investments are made to respond to emerging changes. This could include strategies to replenish an ageing workforce, or ensuring the right mix of services and supports are available to meet the needs of the community, such as increased aged care services.

“The population of Peel continues to grow ... driven by the region's enviable lifestyle, strong transport connections to Perth and comparative affordability of housing. However, there is forecasted to be large percentage increases in the 80-84 age group, and over 85s.

RDA PEEL (WA)



Workforce, skills and training – *opportunities for work*

In recent years there has been a growing number of jobs advertised across regional Australia – with the numbers more than doubling over the four years to October 2023, and remaining higher than pre-pandemic levels (Figure 3). While a range of sectors are looking for workers, health-related occupations lead the number of jobs advertised – the highest number are for medical practitioners and nurses followed by carers and aides, as at October 2023 (Figure 4).

When trying to recruit, regional employers are more likely to face difficulty now than they were three years ago, though this has been easing over the last 12 months (down 16 percentage points, as at October 2023) (Figure 5).¹¹

“Southern Inland is suffering from a ‘more jobs than people’ crisis with many businesses not able to build peak capacity due to staffing shortages.

RDA SOUTHERN INLAND (NSW)





Recruitment difficulty may reflect challenges in attracting, or accommodating, workers to move to and live in the region – or a shortage of workers with the right skills for the jobs available. When asked why they had difficulty recruiting, regional employers more consistently report “location” as a reason for recruitment difficulty compared with their capital city counterparts.¹² Both regionally and nationally, there are a range of occupations with skills shortages, spanning jobs that require both Vocational Education and Training (VET) and higher education qualifications.¹³

Supporting regional Australians to have the right skills to take up job opportunities now and into the future requires planning and a coordinated effort across governments, along with investment in education and training. In addition, broader regional conditions, like housing and liveability, also play a part in attracting and keeping people that contribute to the workforce.

“With unemployment below 2 per cent in many regions and housing very tight in most regions, it is more important than ever to make the most out of people already living in our regions or who are available to rejoin the workforce with the right support.

CEO, REGIONAL AUSTRALIA INSTITUTE

Figure 3: Job ads posted in regional Australia, 2019 to 2023



Source: Jobs and Skills Australia, Internet Vacancies, ANZSCO2 Occupations, Internet Vacancy Index (IVI) Regions – October 2023



Figure 4: Top regional recruiting occupations, October 2023



Source: Jobs and Skills Australia, Internet Vacancies, ANZSCO2 Occupations, IVI Regions - October 2023

Figure 5: Proportion of regional recruiting employers who had recruitment difficulty, 2020 to 2023



Source: Jobs and Skills Australia, Recruitment Experiences and Outlook Survey, October 2023

Snapshot of Government action

Employment White Paper – Working Future

Released on 25 September 2023, the Employment White Paper – Working Future – provides a roadmap to position the Australian labour market for the future. The document presents 31 future reform directions that will guide policymaking of government as well as the work of industry, unions, the education sector and civil society.

Achieving this vision will require concerted action across a comprehensive range of policy levers, including modernising industry and regional policy so that people, communities and businesses are positioned to withstand the challenges and reap the benefits from major shifts in the economy. Regional Australia will benefit from the Government's commitment to strong local labour markets through reforms to the Local Jobs Program and through its ongoing commitment to pursuing place-based approaches.

National Skills Agreement and fee-free TAFE

The five-year National Skills Agreement will provide stable and long-term funding for vocational education and training, including in regional Australia. The joint agreement between the Australian Government and state and territory governments includes Australian Government funding of up to \$12.6 billion over five years. This includes \$11.3 billion in flexible funding to support state and territory skills systems, including to deliver national priorities, while preserving flexibility for states and territories to align local skills supply with local demand.

In addition, the Government has partnered with states and territories to deliver over \$1.4 billion for 480,000 Fee-Free TAFE and vocational education places across Australia over 2023 to 2026. Priority sectors under Fee-Free TAFE include agriculture, care, construction, Defence, early childhood education and care, hospitality and tourism, manufacturing, sovereign capability, technology and digital, as well as VET workforce from 2024.

Regional University Study Hubs

In response to the Australian Universities Accord Interim Report, released in July 2023, the Australian Government committed \$66.9 million to double the number of University Study Hubs across Australia, including up to 20 new Regional University Study Hubs. A competitive grant round to establish up to 10 of the new Regional University Study Hubs closed mid-December 2023.

Regional University Study Hubs are community-owned organisations that provide facilities and administrative, general academic skills and wellbeing support for students studying at any Australian university or VET provider. There are currently 33 Regional University Study Hubs in operation, with one further Regional University Study Hub currently being established, expected to open in early 2024. In 2023, Regional University Study Hubs supported approximately 4,000 students across Australia.

Australian Apprenticeship Supports and Services

The Australian Government has redesigned the model for apprenticeship services and non-financial supports, to address critical skills shortages, lift completions and ensure all apprentices are set up to succeed and feel valued in the workplace. New arrangements will be rolled out from 1 July 2024 and will:

- make mentoring more accessible earlier and provide specialised support to improve outcomes for First Nations apprentices, apprentices with a disability, those who live remotely, women in male-dominated trades and others who experience additional barriers to completing their apprenticeship
- ensure more proactive support from services over the course of the apprenticeship, with an increased focus on supporting completions
- leverage technology to streamline claims processing and program administration for employers, freeing up service providers' time so they can spend more time supporting apprentices.





Case studies

Bundaberg's community-driven solution supports youth and industries

In 2022, the Bundaberg Regional Council collaborated with local agricultural leaders and Kepnock State High School to respond to local workforce needs and help youth unemployment to bounce back from the impacts of COVID-19.

The Integrated Pathways @ Kepnock (IP@K) is a vocation-based program that supports young people aged 13 to 15 to build their understanding of career opportunities within their regional industry sectors. The IP@K program aims to give disengaged youth alternative pathways to education and employment through interactive learning experiences with participating industry mentors. The program has a holistic approach, with participants supported by youth workers from Peirson Services providing counselling and support programs for children and young people.

The pilot of IP@K saw an increase in school engagement and highlighted skills pathways into local jobs for participating students, helping to tackle labour shortages in the mentoring sectors. The success of IP@K is driven by the collaboration and commitment of key local partners, including Peirson Trust Memorial, Bundaberg Fruit and Vegetable Growers, Bundaberg Regional Council, Kepnock State High School and Suncoast Gold Macadamias.

The 2023 program was funded through the Foundation for Rural and Regional Renewal with a \$50,000 Strengthening Rural Communities – Rebuilding Regional Communities grant from the Australian Government, and \$171,000 in-kind contributions from the Council and project partners. Through this funding, the IP@K program has tripled in size to engage more participants with support from over 20 businesses in Agriculture, Tourism, Manufacturing, Health and Community Sectors.

A warm welcome for essential workers

Across regional NSW, The Welcome Experience is helping people to move to the regions and take up jobs in key sectors like health, education, police, fire and emergency and communities and justice.

Recognising that moving to a new place can be a daunting and complex process, the NSW Government is funding the concierge-like service to assist essential workers to learn about the region and connect to information and services to make their move a success. Support can also be provided to help partners find employment in their own fields.

The service is driven by Local Connectors who are already embedded in local organisations like Regional Development Australia committees, NSW government agencies and local councils and chambers of commerce. Drawing on their networks, the Local Connectors can help navigate things like housing, education and

child care, accessibility and healthcare, as well as social and cultural connections and recreation options.

By easing the path to filling essential worker roles, The Welcome Experience is helping regions to provide the critical services – like health and education – that their people need. At the same time, this is helping to build the amenity and attraction of the region for other potential newcomers, providing confidence in the lifestyle and services available.

The NSW Government is currently piloting the program in eight locations – Bega Valley, Coffs Harbour, Broken Hill, Corowa, Goulburn, Griffith, Muswellbrook, and Walgett – ahead of a planned broader roll out in 2024. The Welcome Experience is supported by a broader Essential Worker Attraction Program which uses mainstream marketing and below the line agency engagement to help facilitate referrals into the service.

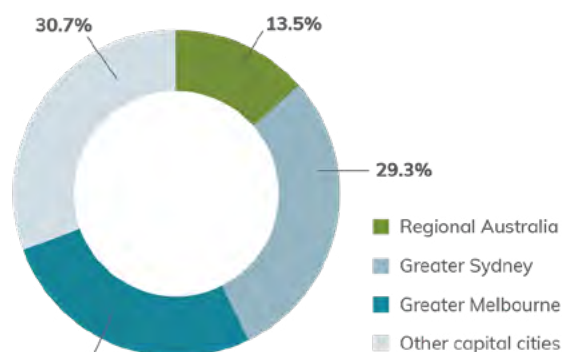
Migration – an asset in the regions

As Australia's economy continues to recover following the COVID-19 pandemic, high demand continues to exist for skilled and lower wage workers to help close labour and skills gaps across a range of sectors.

Skilled migrants who live and work in regional Australia have strong employment outcomes (Figure 6). However, the 2023 Review of the Migration System noted they also tend to have lower incomes and work at lower skill levels than most other permanent visa cohorts or non-regional migrants – likely due to the difference in labour market compositions in regional and metropolitan Australia.

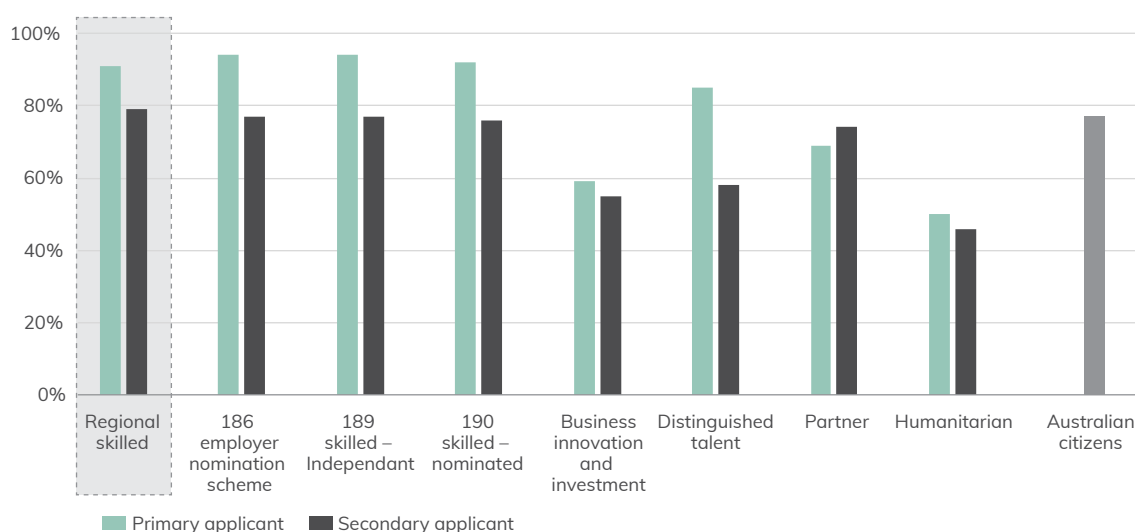
While Australia's regional visa programs offer incentives to encourage skilled migrants to live and work in regional Australia, the majority of migrants (86.6 per cent) settle in capital city areas, primarily Greater Sydney and Greater Melbourne (Figure 7).

Figure 7: Proportion of permanent residents living in regional Australia and capital city areas, 2021



Source: ABS, Permanent Migrants in Australia, 2021. Figures do not total to 100.0 per cent due to rounding.

Figure 6: Regional migrants' employment outcomes, compared to other permanent migrants and Australians, 2021



Source: Australian Census and Migrants Integrated Dataset 2021; ABS Census of Population and Housing, 2021, TableBuilder. Employment to population ratio, by visa subclass.



Australia's migration program can help address regional labour and skills shortages. Factors such as liveable communities with sufficient infrastructure, employment opportunities, available and affordable housing, and access to services are likely to be more important in attracting and retaining migrants in regional areas in the long term. To maximise the benefit of migration to the regions, migration should also be considered within broader regional development plans that include attraction and retention strategies.

“There are significant opportunities for employment in the region, the issue is attracting and retaining internal and overseas migrants against a background of high rents (and a vacancy rate of less than 1 per cent) and high property prices (second only to Sydney). Most enquiries we receive from overseas migrants relate to the cost and availability of accommodation.

RDA ILLAWARRA (NSW)

Snapshot of Government action

Migration Strategy – Getting migration working for the nation

The Migration Strategy released on 11 December 2023 outlines the Australian Government's vision for a new migration system.

In recognition of the importance of supporting the vitality and prosperity of regional Australia, the Migration Strategy commits a key action to evaluating how the migration system can better support regional Australia in new ways. This includes evaluating regional migration settings and the Working Holiday Maker program to ensure migration supports development objectives in regional Australia and does not contribute to the exploitation of migrant workers. The Government is also supporting regional Australia to get fast access to skilled workers, making visa processing for migrants sponsored by employers in regional Australia its top processing priority.

At National Cabinet on 16 August 2023, First Ministers agreed to better coordinate Australia's migration settings. This will be a key component of a multi-year planning model proposed to extend the planning horizon of the Migration Program beyond its current 12-month horizon and enable better coordination of our migration settings to meet the strategic, structural working and long-term challenges we face as a nation, in both our cities and regions. The Government is now working with state and territory governments to develop multi-year planning model options.

First Nations peoples – strengthening communities

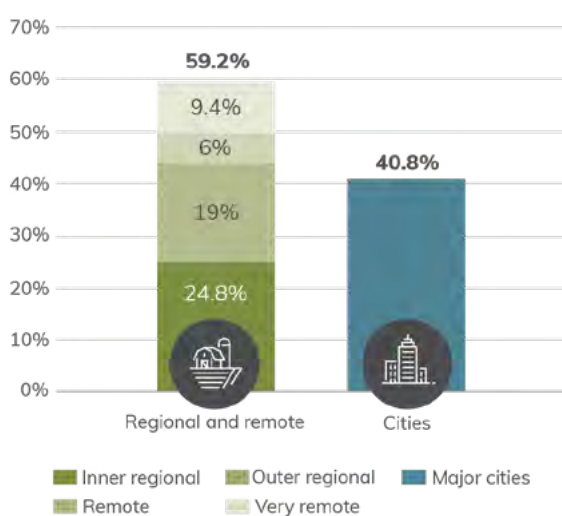
The majority of Aboriginal and Torres Strait Islander people live outside of Australia's major cities, with many living in urban areas of regional cities and towns (Figure 8). First Nations communities in remote and regional areas (including some inner urban areas) often face more complex issues compared to those in major cities. Intentional and sustainable investment in these locations is essential to delivering positive outcomes for First Nations people. Greater recognition of the Aboriginal and Torres Strait Islander contribution to regional economies within broader regional development plans will maximise benefits for all. As reflected in the Closing the Gap Framework, the needs of, and opportunities for, Aboriginal and Torres Strait

Islander people, including social and economic aspirations, must be considered across all policy areas – including the subjects highlighted in other sections of this report – and through genuine First Nations-led partnerships.

Work that empowers First Nations people, communities and organisations at a local level must be underpinned by a recognition and understanding of Aboriginal and Torres Strait Islander cultures, with a commitment to ensure First Nations knowledges and languages are promoted and protected. Research shows maintaining strong connections to cultures, Country, community and languages has significant positive impacts on the health and wellbeing and the social and economic outcomes of First Nations people.^{14, 15, 16} It can also support First Nations people to be informed and better supported to engage with important services and resources such as education, health and mental health, and employment and training.^{17, 18}



Figure 8: Proportion of First Nations population by region, 2021



Source: ABS, Census of Population and Housing, 2021, Estimates of Aboriginal and Torres Strait Islander Australians 30 June 2021





First Nations culture and wellbeing research

Building the evidence base about the impact of First Nations cultures and languages needs to be led by, or developed in partnership with, First Nations people.

A leading example is Mayi Kuwayu: The National Longitudinal Study of Aboriginal and Torres Strait Islander Wellbeing, which is designed and led by First Nations researchers and staff at the Australian National University.^{19, 20}

Research informing Mayi Kuwayu brought together for the first time the range of factors describing Aboriginal and Torres Strait Islander culture, identifying six broad domains: Connection to Country; Indigenous beliefs and knowledge; Indigenous language; Family, kinship and community; Cultural expression and continuity; and Self-determination and leadership.²¹

Mayi Kuwayu commenced data collection in 2018 through a survey shaped and developed by Aboriginal and Torres Strait Islander communities and organisations. The study aims to build a greater understanding of the value of culture and the factors that improve and influence Aboriginal and Torres Strait Islander health and wellbeing.

As a component of culture, the strengthening and revitalisation of First Nations languages is one way of recognising and celebrating First Nations people. Languages connect people to Country, cultures, kinships, songlines and knowledges. Languages are integral in affirming and maintaining the identity, wellbeing, vitality, autonomy and strength of Aboriginal and Torres Strait Islander people.²²

“Local governments are committed to building a more prosperous and inclusive future for First Nations people based on genuine and respectful partnerships.”

PRESIDENT, AUSTRALIAN LOCAL GOVERNMENT ASSOCIATION



Snapshot of Government action

Working in partnership with First Nations people

The National Agreement on Closing the Gap reflects the Australian Government's commitment to work in partnership with Aboriginal and Torres Strait Islander people to achieve life outcomes equal to all Australians, including through Priority Reform 1 Formal Partnerships and Shared Decision Making. The National Agreement includes priority reforms aimed at changing the way governments work with Aboriginal and Torres Strait Islander people, along with socio-economic targets and outcomes, spanning many of the issues discussed in this report.

Recognising the role informative and accessible data plays in directing and measuring change, the Productivity Commission provides an Annual Data Compilation Report and dashboard providing the most up-to-date information on the targets and indicators in the National Agreement.

The Government supports the Empowered Communities (EC) model as a First Nations-designed and led empowerment, development and productivity partnership approach. Through EC, First Nations communities are supported to put forward their priorities to governments and have a real say in the policies, investment and services delivered in their regions. Each EC region has developed long-term Regional Development Agendas setting out the priorities for the region. EC operates in 10 regions, eight of which are in regional and remote areas.

Recognising the aspirations of First Nations people is central to the Northern Australia agenda. The Australian Government is working with the Queensland, Western Australian and Northern Territory governments on 14 priority areas to support development in Northern Australia, which includes genuine engagement with First Nations people as a cross-cutting theme. The Australian Government is undertaking a refresh of the 2015 Our North, Our Future: White Paper on Developing Northern Australia by delivering a prioritised action plan to refocus delivery and reinject urgency in the economic development agenda. This is informed by engagement with First Nations stakeholders and the Northern Australia Indigenous Reference Group, which provides policy advice on practical actions to enhance the economic prosperity of First Nations people and unlock the Indigenous Estate in Northern Australia.



PLACES







Australia's regional places are diverse – but some fundamental factors are essential to support the productivity, liveability and sustainability of a place.

While different communities have different needs, all regions recognise the importance of infrastructure – like roads, bridges, rail and air infrastructure – to ensure they stay connected and experience the economic benefits from access to national and global markets. Social infrastructure – like community hubs and centres, local sport centres, and art galleries – are also important for supporting vibrant communities and quality of life.

Across regional Australia, there is broad recognition that liveability is a key factor in ensuring strong and sustainable communities – and in attracting and retaining workforces, as noted by participants in the Ministerial Regional Roundtable in mid-2023. Housing supply and affordability is a critical part of liveability – with discussions at the 2023 Australian Council of Local Government forum recognising the role of local government in driving local solutions to housing issues.

Australia's regions often bear the brunt of natural hazards and a changing climate, with cumulative impacts for individuals and communities over time. While the circumstances in each place are unique, the focus on preparedness and resilience is a consistent priority across regional Australia.

Infrastructure – targeting investment can unlock potential

Infrastructure is key to unlocking the potential of regional Australia. In particular, land transport infrastructure is a fundamental enabler of productive, connected and inclusive communities and economies. It connects people, places and services, while facilitating the distribution of significant quantities of goods – across agriculture, resources and manufacturing – throughout Australia and around the world.

“The future growth of industries like agriculture, the visitor economy, and clean energy relies on well-developed road infrastructure.

RDA BARWON SOUTH WEST (VIC)

Governments invest significantly in road and rail infrastructure – and different infrastructure is needed in different places, depending on local priorities such as economic opportunities, the landscape, and climate. For some regions, the focus will be on infrastructure investment to help drive economic growth, for example investment in port and rail facilities to unlock export opportunities in emerging sectors. In other regions, new or upgraded roads may be required to respond to extreme weather events, ease traffic congestion resulting from strong population growth, improve safety for road users and local residents, or increase the resilience of supply chains and support the growth in freight transported on regional roads (as shown at Figure 9).

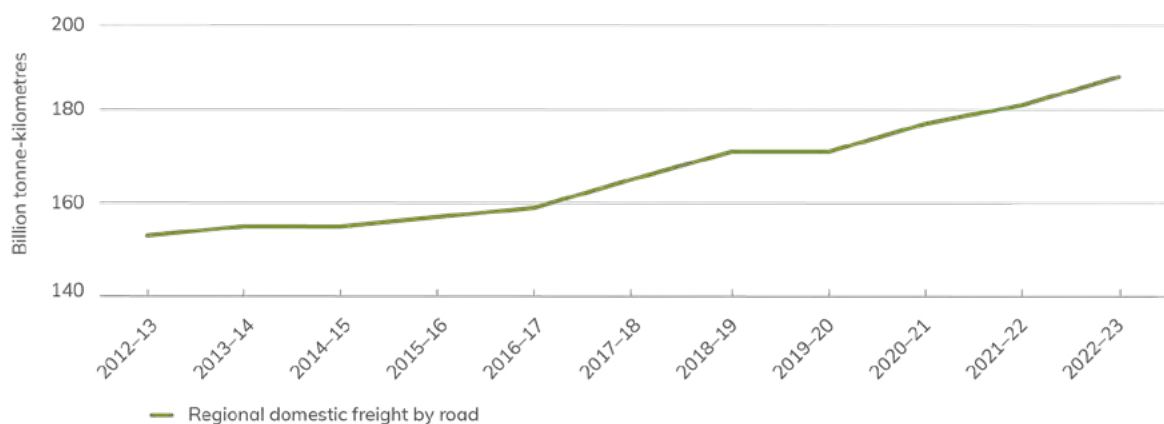
There are many competing demands for funding, with various infrastructure needs across the country. The construction sector continues to face significant market capacity constraints that will impact the deliverability of future infrastructure projects. Further, investment needs to be targeted and carefully prioritised to ensure it is directed to the areas that deliver benefits and address the needs of communities, industries and the economy.

Air transport and aviation related infrastructure is crucial to keeping regional communities connected, healthy and safe. Government delivery of programs across areas like health and education often relies on air services to regional and remote areas, including for First Nations communities. As studies have suggested, however, there are challenges for the sector presented by Australia's large distances and small population centres outside capital cities – with factors like the cost of operating airports, airport charges, fuel prices, and high costs associated with attracting workers cited as contributing to the cost of regional air services. Additionally, characteristics of regional aviation present unique challenges for the sector to meet net zero targets.²³

Planning and preparing for the future is important. The Government's Aviation White Paper will set clear policy directions for regional aviation infrastructure, and emerging and net zero technologies, to guide the sector through to 2050.



Figure 9: Regional domestic freight by road, 2012-13 to 2022-23



Source: Bureau of Infrastructure and Transport Research Economics, Australian Infrastructure and Transport Statistics Yearbook 2023



Snapshot of Government action

Affordable, sustainable and impactful infrastructure investment

The Australian Government works in partnership with state and territory governments, local governments and delivery partners to enable the delivery of a range of road and rail infrastructure investment projects. These projects deliver critical benefits for people across Australia, including in the regions.

The Australian Government's Infrastructure Investment Program (IIP) is part of a rolling 10-year \$120 billion pipeline that provides funding for land transport infrastructure across Australia, including regional Australia.

The objective of the IIP is to assist economic and social development by providing funding to improve the standard of land transport infrastructure regionally and nationally. The IIP provides impactful and enduring benefits to communities in regional Australia, with at least one third of IIP funding going towards the delivery of projects that are wholly located within the regions. Some notable IIP projects include:

- Sealing the Tanami Road, which runs from Halls Creek in WA to the Stuart Highway near Alice Springs in the Northern Territory (NT). This will improve safety and access to remote areas of the NT and WA, and unlock potential economic and social benefits for First Nations and remote communities, particularly in the areas of tourism, mining and freight. The Australian Government is contributing \$1.08 billion.
- Western Highway Corridor upgrades in Victoria which will benefit industries relying on this highway, including farming, regional tourism and manufacturing services. The Australian Government is contributing \$982 million.
- The Nationwide Freight Highway Upgrade Program in SA which will provide a 10 year program of upgrades to the Dukes, Stuart and Augusta highways, and maximise the efficiency of SA's regional and intrastate freight network. The Australian Government is contributing \$400 million.

In November 2023, the Government announced a significant boost to road funding for local councils under the IIP, which will largely benefit regional areas. Funding available under the Roads to Recovery Program will increase from \$500 million (in 2024–25) to \$1 billion per year (in 2027–28), and Black Spot funding will increase from \$110 million (in 2024–25) to \$150 million per year (in 2027–28).

Northern Australia Infrastructure Facility

The Northern Australian Infrastructure Facility (NAIF) is a financier with a lending facility provided by the Australian Government that provides loans to infrastructure projects and businesses across northern Australia. Since 2016, NAIF investment decisions proceeding across the three northern Australia jurisdictions – Queensland, the Northern Territory and Western Australia – currently total around \$4 billion, supporting projects with an estimated capital value of \$14.7 billion, and forecast to generate around \$30.5 billion in economic benefit and support around 15,300 jobs.

NAIF has supported projects across a broad array of industries and sectors including resources, aviation, ports and rail, agriculture, water, energy, manufacturing, telecommunications and social infrastructure. Importantly, NAIF has a higher tolerance for the unique risks of investing in northern Australia, including but not limited to distance, remoteness and climate.

High Speed Rail

The Government also provides leadership in the delivery of nation-building infrastructure that benefits regional Australia. The newly established High Speed Rail Authority has commenced planning for a new high speed rail network in Australia, starting with a link between Sydney and Newcastle and with early priorities backed by a \$500 million commitment from the Government. High speed rail will revolutionise interstate travel on the east coast, providing a fast alternative for people to move between cities and regional centres, promoting sustainable settlement patterns and creating broad economic benefits for regional centres.



Case study

Coordinating and prioritising for better infrastructure outcomes

Every five years since 2013, Regional Development South Australia (RDSA) has coordinated across the state's Regional Development Australia (RDA) committees to bring together a report on infrastructure prioritisation for regional South Australia. Recognising the importance of infrastructure investment that responds to genuine needs and opportunities, the report seeks to inform and encourage public and private investment in the infrastructure projects that RDA committees believe will drive real and lasting benefits for South Australia's regions.

Working in partnership with the Australian Government, the South Australian Government and the Local Government Association of South Australia, RDSA brings together the seven regionally-based RDA committees in South Australia, as well as RDA Adelaide Metropolitan. This approach supports the consideration of issues in a broader way than project-by-project or region-by-region. By coming together, the RDA committees are able to share knowledge and identify opportunities to drive joined-up action that leverages better outcomes across the state.

The infrastructure prioritisation report exemplifies a coordinated approach in action. While it captures key infrastructure priorities for each of South Australia's regions, it backs in the importance of considering projects collectively. For example, one project can create an opportunity for efficiencies or coordination with another project – and individual projects can also create challenges for other projects or in other regions.

The RDSA infrastructure priority report makes an important contribution to place-based, coordinated, locally-informed and transparent infrastructure investment decision making.





Housing – necessary for growth

Regions and cities across Australia – and in many countries globally – are experiencing challenges associated with tight housing markets. Housing availability, affordability and low rental vacancy rates affect the ability of people to move to the regions, and impact on those already living and working in a region.

“The region is planning for significant workforce growth over the coming years, but the limited supply of quality housing presents a real barrier.

RDA FAR WEST (NSW)

For Australians looking to enter the rental market in regional areas, growth in advertised rents (which measure the asking price for currently vacant rental properties) has been largely consistent with capital cities. However, during the COVID-19 pandemic, advertised rents increased rapidly throughout Australia, peaking at 9.7 per cent in November 2021. This was due to many Australians moving to regional areas to capitalise on the increasing popularity in working from home and fewer COVID-19 lockdowns. However, since the easing of COVID-19 restrictions in 2021 and 2022, the growth of advertised rents in regional areas has decreased rapidly and at December 2023 was 4.4 per cent, substantially less than 9.8 per cent in capital cities (Figure 10).

Figure 10: Growth in advertised rents, 2007 to 2023



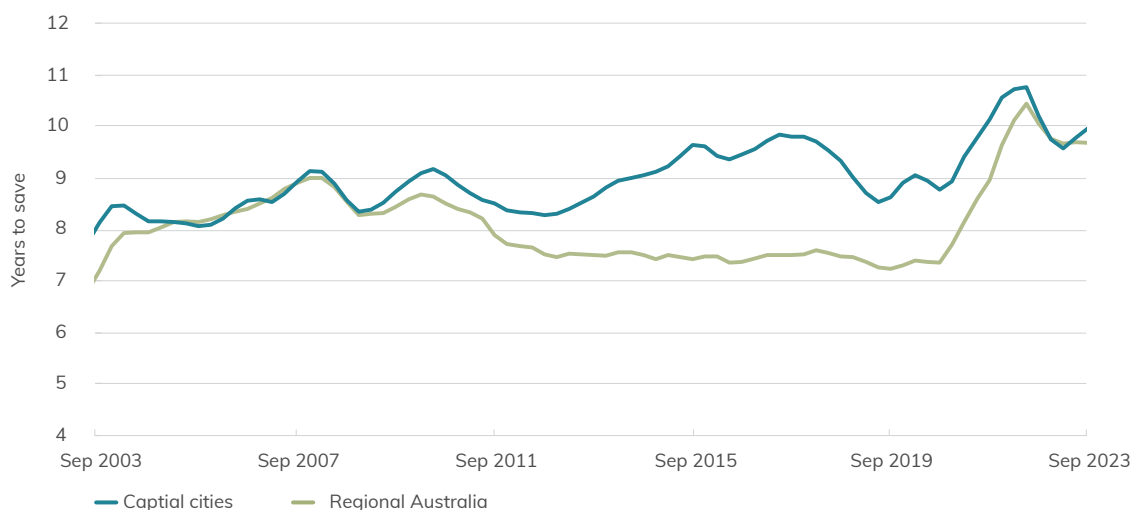
Source: CoreLogic. Percentages calculated as through the year growth, which is the percentage change from the same period in the previous year.

For Australians looking to enter the housing market, for most of the past two decades, households in regional areas were able to save a housing deposit faster than in capital cities when considering both income and property prices in these respective areas. In September 2019, it took on average 7.2 years to save a deposit in regional areas, compared to 8.6 years in capital cities.

Since the pandemic, the number of years required to save a housing deposit in regional Australia has increased to 9.7 years in September 2023. This is now only slightly below the time taken in capital cities at 10 years (Figure 11). This likely reflects consumer preferences of Australians post-pandemic, following the increased opportunity for remote working.



Figure 11: Years taken to save for a house or unit deposit, 2003 to 2023



Source: CoreLogic



Snapshot of Government action

In August 2023, National Cabinet agreed to a new national target of building 1.2 million new well-located homes across the country over five years from 1 July 2024. This is an additional 200,000 new homes above the original 1 million target agreed under the National Housing Accord in 2022. This will include homes in regional areas.

To support the states and territories in achieving this target, the Australian Government has committed to:

- support the National Planning Reform Blueprint containing planning and zoning reforms, land release and other measures to improve housing supply and affordability, as well as investing \$350 million in additional federal funding to deliver 10,000 affordable rental homes over five years from 2024 – matched by the state and territories
- \$2 billion through the Social Housing Accelerator to deliver thousands of social homes across Australia
- \$3 billion under the New Homes Bonus, a performance-based fund for states that exceed their share of the original 1 million homes target under the Accord
- \$500 million for the Housing Support Program, a funding program for local and state governments to increase housing supply.

For the 2024 financial year, the Regional First Home Buyer Guarantee will help more than 10,000 eligible people in regional Australia to purchase homes with deposits as little as 5 per cent.

Legislation to establish the \$10 billion Housing Australia Future Fund to support 30,000 new social and affordable rental homes over its first five years has now passed the

Parliament. The first funding round under the Fund commenced in January 2024. Housing Australia's Investment Mandate will help ensure regional, rural and remote Australia benefit from homes that are delivered.

The Government has introduced legislation to establish the Help to Buy scheme. Help to Buy will support up to 40,000 low and middle-income families to purchase a home of their own.

Federal funding of \$1.7 billion has been provided for a one-year extension of the National Housing and Homelessness Agreement with states and territories, while a new Commonwealth-State agreement on housing is developed.

The Government has increased the maximum rates of Commonwealth Rent Assistance by 15 per cent, the largest increase in more than 30 years.

National Cabinet has also agreed to A Better Deal for Renters to harmonise and strengthen renters' rights across Australia. This includes:

- developing a nationally consistent policy to implement a requirement for genuine reasonable grounds for eviction
- moving towards limiting rent increases to once a year
- phasing in minimum rental standards.

Looking ahead, the Australian Government, in close collaboration with state and territory governments, is also developing a National Housing and Homelessness Plan – to identify short, medium and long-term reforms needed to improve outcomes across the housing spectrum and address homelessness, including for those living in regional, rural and remote areas.



Case study

Community collaboration to unlock housing solutions

Seeking to drive collaborative solutions to housing issues identified in Queensland's Greater Whitsunday region, Greater Whitsunday Communities (GWC) and RDA Greater Whitsundays (RDA GW) have partnered on a regional housing project.

The Greater Whitsunday Housing Project is a multi-phased initiative targeted to bring together a range of local stakeholders to discuss, and drive positive outcomes to, current and future housing challenges. Featuring a broad and inclusive steering committee – with membership including regional councils, developers, housing trusts and industry associations, and regional Indigenous housing program, Girudala – the Housing Project has so far included a roundtable, research project, summit and associated action plan.

The Greater Whitsunday Housing Summit, held in August 2023, brought together around 170 participants who took part in workshops to develop solutions across topics including workforce accommodation, social and affordable housing, housing innovation to reduce time and cost, and aged care and retirement living. A key outcome of the Summit, the 2023 Greater Whitsunday Housing Summit Action Plan, includes prioritised solutions discussed at the Summit, as well as identification of relevant stakeholders who can help progress outcomes.

The Housing Summit also demonstrated majority support of participants for the establishment of a Housing Alliance, in which GWC and RDA GW are now in the process of developing an operational model. It is anticipated that the Housing Alliance will coordinate and drive activities flowing from the Housing Project – helping to unite efforts, amplify impact, and chart a path for comprehensive solutions across the housing spectrum.





Liveability – complex to measure but critical for communities

The liveability of Australia's regions is important to their ability to attract and retain vibrant, diverse and connected populations. However, defining liveability is not straightforward, as there are multiple factors impacting the choices people make about where they and their families live.

Liveability incorporates the qualities and characteristics of a place that support wellbeing and quality of life. While this can look different across the country, there are similar features necessary for improving liveability – things like boosting access to social infrastructure (including arts and culture, community services and sporting facilities), improving the quality of natural and urban environments (like parks, waterways and streetscapes), and facilitating social connectivity and community safety.

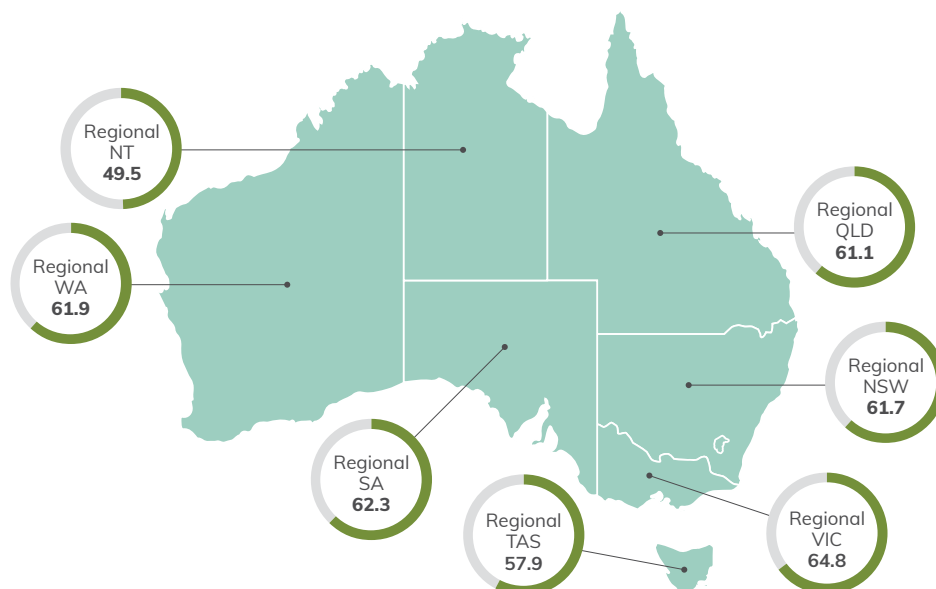
Different aspects of liveability are more or less important to different people, and at different stages of life. As noted by the Regional Australia Institute, while access to early childhood or primary education may make a place liveable for a young family, this will not necessarily feature in the liveability assessments of retirees.²⁴

“The liveability challenge is universal across the region but the experience of it is very different in different locations (largely as a factor of how small and remote populations are).”

RDA NORTHERN TERRITORY (NT)

The 2022 IPSOS Life in Australia poll measures liveability in regional Australia, by combining the factors that regional Australians feel are important with their performance by rating. The overall index is set between 0 and 100, with higher numbers representing greater liveability (Figure 12).²⁵

Figure 12: Liveability index in regional Australia by state, 2022



Source: IPSOS Life in Australia 2022

From the 2022 IPSOS Life in Australia poll, the top five attributes regional Australians regard as important to making their local area a good place to live include feeling safe; high quality health services; affordable decent housing; access to the natural environment; and a strong sense of community (Figure 13). The highest rated attribute in terms of importance was ‘feeling safe’ at 60 per cent of respondents (which is the same score for residents of capital cities).

Investment priorities for regions need to be informed by their communities and tailored to the unique context of individual places. This includes developing a place-based understanding of local challenges and opportunities, with communities and all levels of government working together in genuine partnerships – and through open and ongoing communication – to address and harness them.

Many regions identify the need for investment in regional infrastructure and community projects that provide the physical space to bring people together. In addition, investment in cultural activities and entertainment fosters community spirit and cultural identity, and delivers positive flow-on effects for education and wellbeing, particularly in remote Australia. In the most recent 2022 National Arts and Participation Survey, Creative Australia found Australians living in

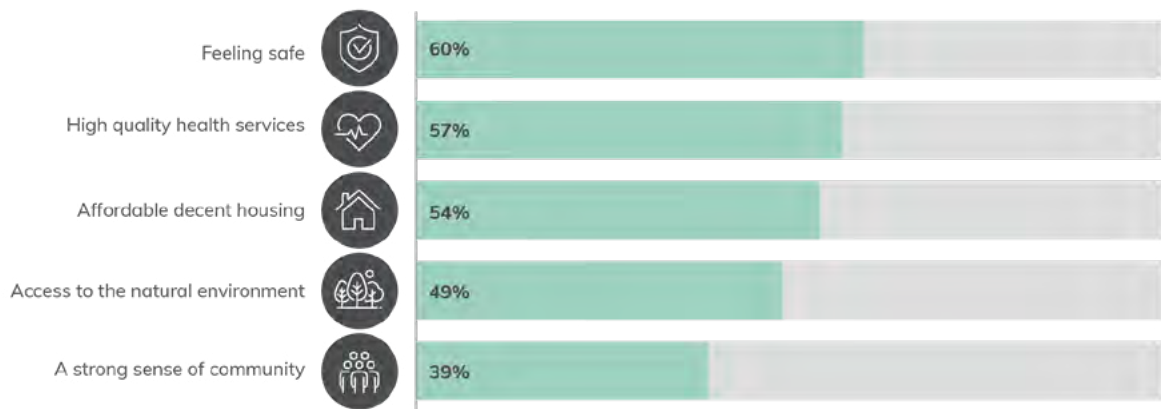
remote areas are more likely to attend arts events to socialise and connect with others and to improve their wellbeing than those living in cities and regional areas.²⁶

“Well-located, well-designed and properly maintained community infrastructure helps produce better quality outcomes for Australian communities as well as facilitating greater social inclusion. It also helps achieve other important social and regional policy outcomes, including attraction and retention of skilled workers, community health and wellbeing, social cohesion and tolerance, building social capital and enabling broad-based education and learning.

AUSTRALIAN LOCAL GOVERNMENT ASSOCIATION



Figure 13: Top attributes that make somewhere a good place to live for regional Australians, 2022



Source: IPSOS Life in Australia 2022



Snapshot of Government action

Growing Regions and regional Precincts and Partnerships programs

The Australian Government is providing \$1 billion for two programs targeted to enhance liveability, boost vibrancy, and support productivity across regional communities. Through place-based and partnership approaches, the \$600 million Growing Regions Program and the \$400 million regional Precincts and Partnerships Program demonstrate how the Australian Government is working with communities and local stakeholders to ensure Australia's regions are places that people, families, and businesses want to move to, stay in, and invest.

The Growing Regions Program provides access to capital works grant funding of between \$500,000 and \$15 million for community and economic infrastructure across regional, rural and remote Australia.

The regional Precincts and Partnerships Program provides grants for both the development and planning of regional precincts – which are 'places of purpose' as defined by the local community, and may include business districts, neighbourhoods, activity centres, commercial hubs, or community and recreational areas – and the delivery of construction-ready precinct infrastructure.

Both the Growing Regions Program and the regional Precincts and Partnerships Program demonstrate the Australian Government's commitment to investing with transparency and integrity – through locally-informed, rigorous processes that ensure taxpayers' money is responsibly targeted to deliver on what regions genuinely need.

National Cultural Policy

The Australian Government released its landmark National Cultural Policy – Revive: a place for every story, a story for every place, in early 2023. Revive recognises the role of local and place-specific culture in increasing a sense of belonging, social connectedness, and wellbeing in regional communities. It includes an increase to the Regional Arts Fund of \$8.5 million over four years from 2023-24, in recognition of the vital role the arts play in strengthening local communities.

Revive confirms the Government's commitment to the Festivals Australia program, which provides around \$1.4 million per year for arts activities at regional and remote festivals or one-off community celebrations.

In addition, Revive provides for the National Gallery of Australia to receive additional funding of \$11.8 million over four years from 2023-24 to share its collection with regional and suburban cultural institutions across Australia.

Revive also acknowledges the importance of strong cultural infrastructure and the role of collecting institutions in preserving, sharing and celebrating Australian stories, as well as the Government's commitment to support our National Collecting Institutions so they can provide broad public access to their collections. Providing significant cultural infrastructure in regional New South Wales, Bundanon includes galleries, an education centre and historical buildings which spread over 1,000 hectares of bush, park and farmland by the Shoalhaven River near Nowra. Bundanon has built strong partnerships in the local region, creating employment, skills development and tourism opportunities, while expanding access to the visual arts.

Climate and disasters – preparing for and adapting to change

The climate in Australia is changing, with different impacts in different parts of the country. While Australia has always been impacted by weather events, the severity and frequency of droughts, and natural hazards – including bushfires, heatwaves, storms and floods – are increasing as a result of climate change. This is impacting more people, places and property – and more often. Figure 14 shows the number and spread of declared disaster events across Australia since 2019, and Figure 15 takes a closer look at disaster impacts in 2023 alone.

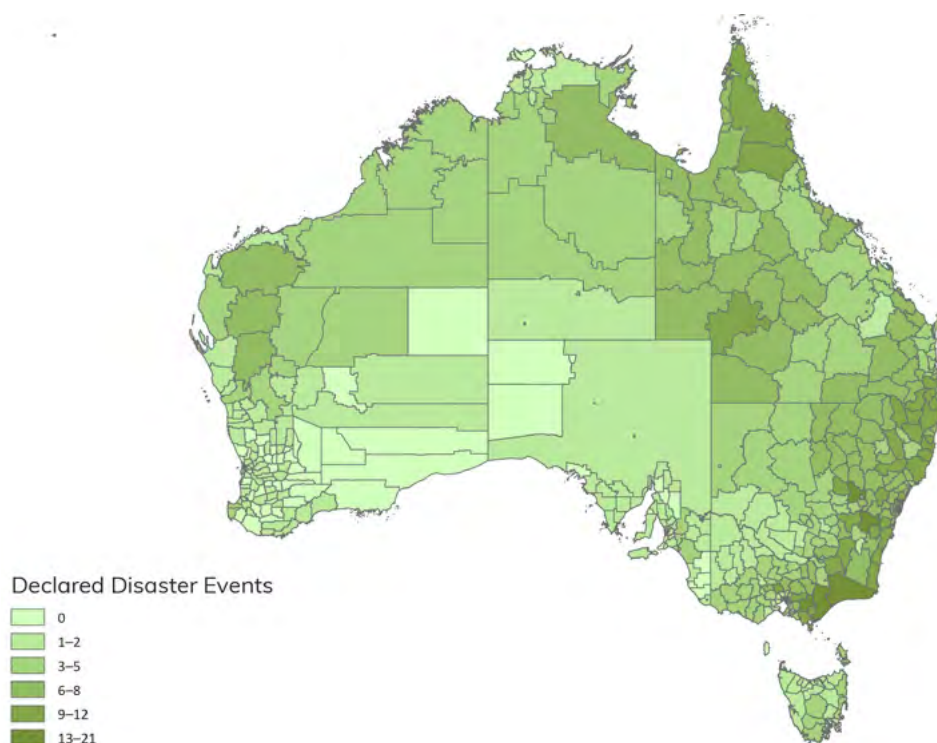
Modelling paints a consistent picture of long-term climate change interacting with underlying natural variability.²⁷ Extreme heat, heavy rainfall, coastal inundation, bushfires and drought will increasingly impact the wellbeing and resilience of our communities, infrastructure and ecosystems.

“Climate change is exacerbating the frequency and severity of natural disasters, including bushfires, floods, storms, coastal inundation, erosion and landslides.

RDA LOGAN AND REDLANDS (QLD)



Figure 14: Formally declared disaster events by Local Government Area, 2019 to 2023



Source: National Emergency Management Agency (NEMA) 2023, Disaster Recovery Funding Arrangement (DRFA) Activation History by Local Government Area (LGA), November 2023



Figure 15: Disaster impacts, 2023



Source: NEMA. *Data combines the Australian Government Disaster Recovery Payment and Disaster Recovery Allowance, as well as Disaster Recovery Funding Arrangements-funded primary producer grants, small and medium business grants, and local government grants. January to December 2023.

In addition to the emotional and economic toll on people, families and communities, climate-related hazards can have substantial and sustained impacts on industry sectors that regions and the nation rely on, like agriculture, energy and tourism. For example, modelling from the Australian Bureau of Agricultural and Resource Economics and Sciences shows certain farming regions in Australia are estimated to be more heavily impacted by climate change than other regions.²⁸ However, the changing climate also presents opportunities for innovation to transform businesses and industries through climate change adaptation. Production of some commodities may cease in one area, begin in another, or change entirely. In agriculture for example, some wine grape growers in warm inland regions are transitioning to climate resilient varieties or have adopted more sustainable vineyard management practices.²⁹

It is in the interests of all Australians that regions particularly vulnerable to impacts from climate change are identified and build resilience to the changing climate and the impacts it brings.



Snapshot of Government action

Strengthening Climate Adaptation

The Australian Government's 2023–24 Budget allocated \$28 million to strengthen climate adaptation and deliver the National Climate Adaptation and Risk Program, including the National Climate Risk Assessment (Risk Assessment) and the National Adaptation Plan (the Plan).

The Risk Assessment will deliver a shared national framework to inform national priorities for climate adaptation and resilience actions, and enable consistent monitoring of climate risk across Australia. Providing objective and science-based evidence for decision-making, it is being delivered in two stages, with the first pass risk assessment process – which ran from July to December 2023 – providing the first ever national level assessment of how climate change puts what we value at risk, now and in the future.

The Plan will be the blueprint for adapting to nationally significant climate risks. The Plan will provide guidance on the national response, including how we adapt to the risks, scale up our adaptation efforts and build our national resilience to climate impacts, particularly challenges faced by rural communities.

The Government is ensuring both the Risk Assessment and the Plan consider and integrate the perspectives of First Nations people, through culturally appropriate engagement and analysis. Caring for Country through First Nations values, knowledges and cultural practices is critical to addressing the cumulative impacts of climate change that are being experienced by First Nations communities.

Disaster risk reduction

The Government takes a connected approach to disaster preparedness, response, recovery and risk reduction. Australia's National Disaster Risk Reduction Framework (the Framework) provides the overarching architecture which guides the National Emergency Management Agency's (NEMA) work to reduce existing disaster risk, minimise new disaster risk, and deliver better climate and disaster risk information.

The Framework is implemented by National Action Plans. In August 2023, Emergency Management Ministers endorsed the Second National Action Plan, which authorises, enables and provides a pathway for all governments, sectors, groups and members of the Australian community to take aligned action to build resilience, reduce disaster risk and work towards common goals.

NEMA also delivers programs to support communities to better protect themselves against the impacts of natural hazard events. The Disaster Ready Fund (DRF) is the Government's flagship disaster resilience and risk reduction initiative, and will provide up to \$1 billion over five years from 1 July 2023. The DRF will deliver projects that support Australians to manage the physical, social and economic impacts of disasters caused by climate change and other natural hazards. This investment, which is expected to be matched by project proponents where possible, will ensure communities are better prepared, less exposed and in the best possible position to recover when disasters strike.

Higher Risk Weather Season National Preparedness Program

To support the collective effort for the higher risk weather season, the Australian Government – through NEMA – delivers an annual Higher Risk Weather Season Preparedness Program. The Program includes multiple preparedness activities and briefings. NEMA held its inaugural Higher Risk Weather Season National Preparedness Summit on 25–26 September 2023, bringing together over 250 participants from 155 organisations. As well as preparing for the Higher Risk Weather Season, NEMA has also been assisting states and territories with preparedness through the National Crisis Exercising and Lessons Capability, which delivers a fit for purpose national exercise program that considers and reviews preparation for, response to, and recovery from severe to catastrophic events.



SERVICES





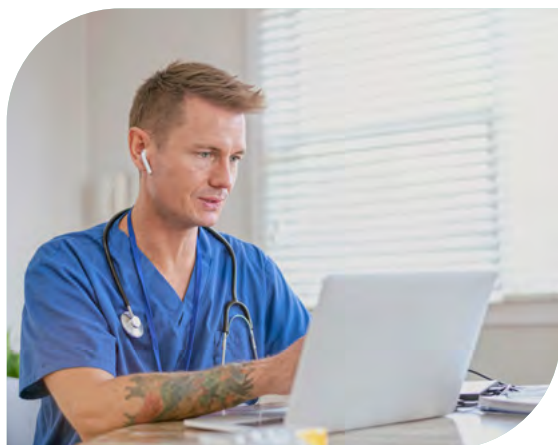


Access to quality services is central to ensuring no one is held back or left behind, regardless of where they live.

For regions across Australia, access to reliable and affordable digital connectivity is essential for both social and economic engagement. Getting digital connectivity right is fundamental to overcoming the ‘tyranny of distance’, and ensuring regional Australians can share in the contemporary benefits accessible to those in the big cities.

However, not all services can be delivered digitally. Regions report the challenge of patients needing to travel significant distances to access specialist health testing and care, noted at the Regional Australia Institute’s National Summit in September 2023.

In addition, the ability for local service delivery is affected by the availability of an appropriately skilled local workforce. Many regions report difficulty in attracting and retaining the qualified people required to deliver community services, particularly as remoteness increases, which affects quality of life and economic opportunity.



Digital connectivity and inclusion – bridging the divide

Digital connectivity unlocks potential by linking regions directly with economies across the country and around the world. It also facilitates accessibility and equity of services, and keeps people and communities connected.³⁰

Communities across regional Australia understand the importance of reliable digital connectivity – because it impacts their professional and personal lives every day. Regions also understand the role digital connectivity will play in ensuring their ongoing strength and vibrancy, given how central it is to harnessing the potential of emerging economic and social opportunities.³¹

“The Gippsland region’s transition from a traditional energy powerhouse to a clean energy one requires a high standard of digital connectivity.

RDA GIPPSLAND (VIC)

Digital inclusion is a critical enabler of access to services for First Nations people in regional and remote areas – including supporting telehealth, online learning, and maintaining connections to Country and cultures. However, First Nations people in regional areas currently have relatively low levels of digital inclusion. The 2023 Australian Digital Inclusion Index, used to identify the critical barriers to inclusion, shows the gap in digital inclusion gets wider in regional, remote and very remote areas. From a national gap of 7.5 in the digital inclusion scores for First Nations people and non-Indigenous people, this widens to 24.4 in remote areas and 25.3 in very remote areas.³²

The same Index shows the digital inclusion divide between capital cities and other parts of the country is narrowing over time, down from a score of 5.5 in 2021 to 5.0 in 2023.³³ It is important factors such as affordability and digital literacy are also considered to ensure regional Australians gain the full benefits.

“Being able to access, afford and effectively use digital technologies has never been more important to participating fully in society. In 2023 FRRR launched a small grants funding round, partnering with Telstra, to enable priority initiatives for digital capability and access in remote, rural and regional Australia. The funding pool of \$200,000 offering grants up to the value of \$10,000 attracted 264 eligible applications. The demand for funding highlights the many digital capability challenges.

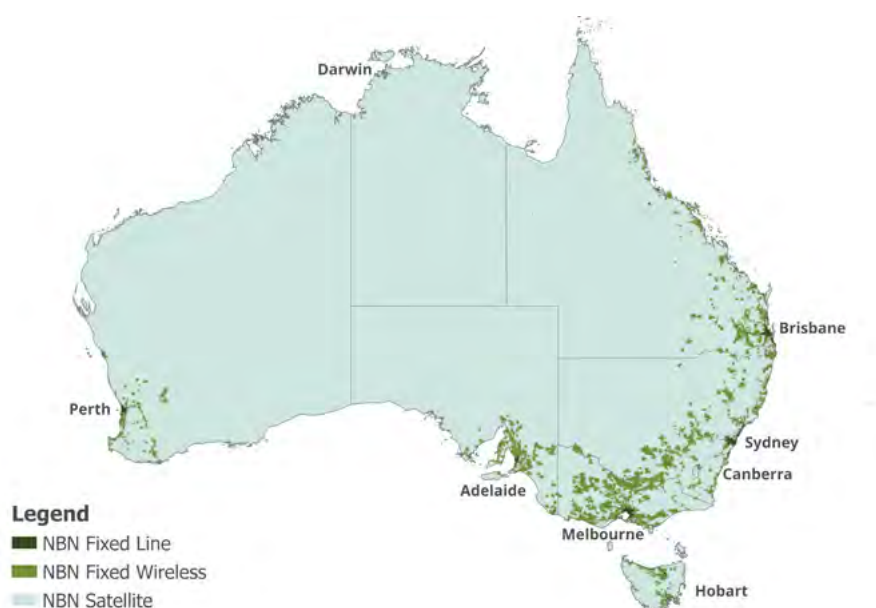
FOUNDATION FOR RURAL AND REGIONAL RENEWAL (FRRR)

“RDA Darling Downs and South West has undertaken a region-wide digital connectivity audit. Data collected from this audit has been shared with our stakeholders and used by some of the Local Governments in our area to address blackspots and advocate for additional investment from other avenues.

RDA DARLING DOWNS AND SOUTH WEST (QLD)

The National Broadband Network (NBN) is giving Australians access to fast internet services and being rolled out across the country using a multi-technology mix.³⁴ The type of technology used is dependent on location (Figure 16). Ensuring our regions are connected is a priority, and work is continuing to improve coverage, increase access and connectivity, and strengthen resilience particularly during disasters.

Figure 16: NBN fixed line, fixed wireless and satellite footprint, 2024



Source: Data provided by NBN Co and map developed by Geospatial Services Team, Data and Systems Branch, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, January 2024



Snapshot of Government action

Better Connectivity Plan for Regional and Rural Australia

In the 2022–23 Budget, \$656 million was provided over five years to improve mobile and broadband connectivity and resilience in rural and regional Australia as part of the Better Connectivity Plan for Regional and Rural Australia.

As part of the Better Connectivity Plan, grants under Round 3 of the Regional Connectivity Program and Round 7 of the Mobile Black Spot Program were announced in December 2023, and will provide \$170.2 million for 136 projects. These aim to narrow the digital divide in rural and regional communities, providing investment to improve mobile coverage issues, fund public Wi-Fi, and deliver fibre upgrades.

Fixed Wireless and Satellite Upgrade Program

As a part of the 2022–23 Federal Budget, the Australian Government provided \$480 million towards a \$750 million upgrade of the NBN fixed wireless network. By the end of 2024, 1 million premises in regional and remote Australia and in peri-urban areas will benefit from improvements to fixed wireless services or greater data limits on Sky Muster services, including uncapped data usage plans.

The upgrade is using the latest 4G and 5G wireless technology to extend the coverage range from existing NBN fixed wireless towers, and will allow higher speed services to everyone served by the towers. As the rollout has progressed, NBN Co has found the network is capable of delivering even better services. These new speed tiers could deliver speeds close to double those originally planned, with 80 per cent of fixed wireless premises nationally expected to be able to access download speeds of up to 400 Mbps. Following the completion of a consultation process, the planned mid-2024 launch of the new speed tiers will mean regional and rural Australians in the fixed wireless footprint will have access to even faster speeds.

Regional Telecommunications Independent Review

In 2024, the Government is undertaking an independent Regional Telecommunications Review. These reviews occur every three years to examine the adequacy of telecommunications services in regional, rural and remote Australia. Public consultation will commence in April, with the final report due to Government by December 2024.

Closing the Gap and First Nations Digital Inclusion Advisory Group

The inclusion of Target 17 in the National Agreement on Closing the Gap, which commits parties to the goal of equal levels of digital inclusion by 2026, reflects the importance of addressing the digital divide.

The Australian Government established the First Nations Digital Inclusion Advisory Group in January 2023 to provide advice to the Minister for Communications on how to progress Target 17. The Advisory Group released its initial report in October 2023, building on the First Nations Digital Inclusion Plan, which was released in July 2023. The First Nations Digital Inclusion Advisory Group has also launched the First Nations Connectivity Mapping tool – enabling First Nations communities and councils to explore and understand connectivity from a geographic perspective.

Digital Skills for Older Australians (Be Connected)

The Australian Government has invested a further \$41.6 million over four years to 30 June 2028 to make sure older Australians can continue to access the Be Connected program through the established network and online resources. The Be Connected program helps older Australians aged over 50 keep safe online and navigate evolving technology, resulting in improved capacity to use online government platforms and other online services. It also helps isolated older Australians remain connected with family, friends and their communities. More than 60 per cent of the community organisations delivering Be Connected supports in the community are in outer regional and remote locations.

Health and aged care – addressing inequity

Figure 17 shows people living in regional and remote areas have shorter life expectancy than people living in capital cities. Data shows they also have higher levels of disease and injury.³⁵ As a group, First Nations people continue to experience poorer health outcomes than non-Indigenous people.³⁶ Accessibility to high-quality health and community services across regions is an ongoing challenge – particularly as remoteness of a region increases.

“Access to health services throughout the Pilbara can be challenging... the availability of specialists can be hit and miss.

RDA PILBARA (WA)



Figure 17: Life expectancy by state and territory, 2020-22



Source: ABS, Life Expectancy, Statistical Areas Level 4, 2015-2017 to 2020-2022



The availability of health services, particularly aged care services, varies depending on remoteness, with most concentrated in more densely populated urban areas. Figure 18 identifies the percentage of aged care services available by type and location. Workforce attraction and retention is also affecting access to services in regional communities.

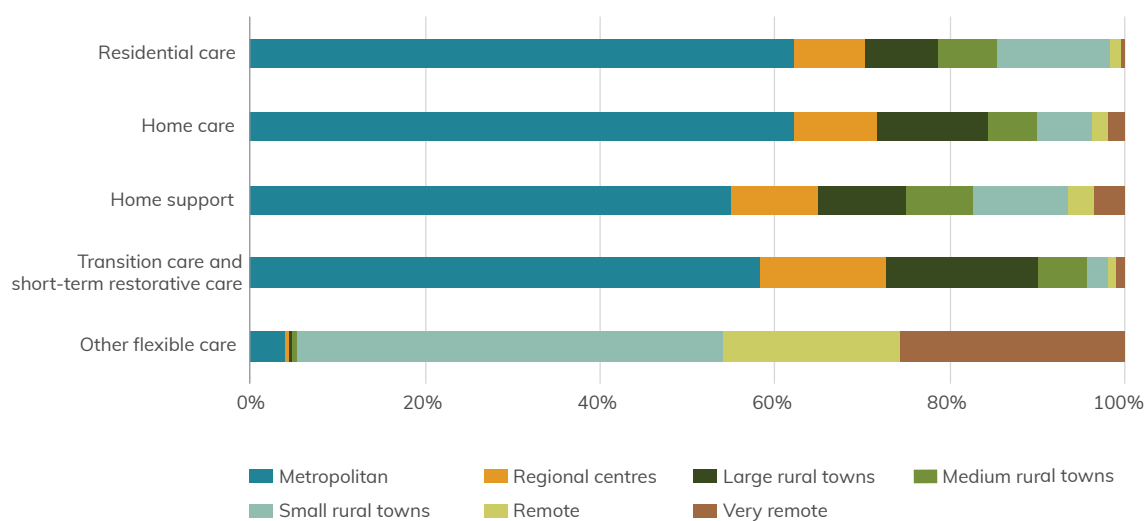
Different people, in different places, need different health services at different stages of life. They also need to be tailored to the needs of the individual and their circumstances, including being culturally safe. With significant variances in proximity and population sizes, meeting service needs across our vast land mass requires place-based approaches that are adaptable, practical and innovative.³⁷ This requires new models of service delivery and innovative approaches in both health and aged care services.

“Workforce shortages create issues for both health and aged care providers.”

RDA RIVERINA (NSW)



Figure 18: Percentage of aged care services by region, 2022



Source: Australian Institute of Health and Welfare, GEN data, Providers, services and places in aged care, 30 June 2022

Snapshot of Government action

Medicare

The Government has made significant investment in expanded access to primary care health services in regional, rural and remote locations, including by tripling Medicare bulk billing incentives, which increase according to the remoteness of the location of service. Guided by the recommendations of the Strengthening Medicare Taskforce, the Government is investing in targeted measures to strengthen Medicare, making it easier to access affordable high-quality care in the community.

Medicare Urgent Care Clinics

The Australian Government is providing \$493.5 million over five years to support the establishment of 58 Medicare Urgent Care Clinics (Medicare UCCs) across Australia, all of which became operational in 2023. They are already easing the pressure on our hospitals and giving Australian families more options to see a healthcare professional when they have an urgent, but not life threatening, need for care. Of these clinics, 10 are located in regional locations, expanding access to urgent care services for these communities. Medicare UCCs are a new model of care, and implementation is being monitored to ensure every clinic operates as effectively as possible and is responsive to the local needs of the community.

Innovative Models of Care (IMOC)

The IMOC program aim is to find effective ways to deliver health and care services to people who live outside of major centres to address distance and access issues, as well as workforce shortages. The IMOC Program supports organisations to trial innovative multidisciplinary models of primary care in rural and remote communities and to evaluate whether they lead to better health outcomes.

Single Employer Model (SEM) trials

To address key barriers to attracting and retaining the next generation of General Practitioners, the SEM trials will explore new approaches to employment arrangements for general practice (GP). The model allows GP trainees to be employed by one employer (i.e. a public hospital or hospital network or state/territory government) throughout their training rotations, allowing increased ease of accruing and accessing employment entitlements and increased certainty of training arrangements. The SEM trials aim to improve the attraction of GP training, improve access to GP services for local communities, in the immediate term through increased numbers of GP trainees, and longer term by encouraging GP trainees to build local connections and enhanced support networks in the communities in which they train.

Aboriginal Community Controlled Health Services

The National Aboriginal Community Controlled Health Organisation is one of six grant recipients funded by the Australian Government to deliver the \$84 million program and delivers services to First Nations people in rural and remote communities across Queensland, South Australia, Western Australia and the Northern Territory.

Aged Care Capital Assistance Program (ACCAP)

The ACCAP is an ongoing infrastructure grants fund that aims to invest in projects that will increase access to quality aged care services in regional, rural and remote locations and for older Australians with complex and diverse needs, including First Nations people and those who are homeless or at risk of homelessness. ACCAP supports organisations to undertake critical infrastructure works, including the building and upgrade of aged care services and staff accommodation to improve access, sustainability and quality of aged care services in these locations.





Snapshot of Government action

Home Care Workforce Support Program

The Home Care Workforce Support Program aims to attract, train and retain 13,000 personal care workers to the aged care sector. The program provides services to home care providers to assist with human resourcing, pre-employment support, and post-placement support to improve retention of workers.

Pacific Australia Labour Mobility

A skilled and supported workforce is essential to delivering quality services across the care and support sector and the Australian Government is committed to enhancing the workforce across the sector. The Government's Pacific Australia Labour Mobility scheme allows aged care providers to employ workers in low and semi-skilled positions across rural and regional Australia for up to four years.

Veterans' and Families' Hubs Program

The Government has invested an additional \$46.7 million to expand the Veterans' and Families' Hubs (Hubs) network to deliver Hubs in 10 locations, while continuing the work already underway in existing locations. Hubs assist veterans and families to access services and support, not only in the local community where Hubs are established, but also via outreach to the surrounding regional areas. Services provided through Hubs may include mental and physical health services, wellbeing support, advocacy, employment and housing advice, and social connection. Completion of the new Hubs is expected by mid-2026.

Case study

Working in partnership with First Nations Communities to establish an aged care service in East Arnhem Land

The Department of Health and Aged Care involves First Nations communities in all aspects of designing and establishing new aged care facilities for First Nations people.

Genuine collaborative partnerships between all levels of Government and local communities ensures the location and design of the service meets the cultural needs of older First Nations people requiring services. Shared decision making empowers and supports communities to be fundamentally involved in the design of facilities, workforce and the service delivery model and the operation of services once the facility is built.

The design, construction and establishment of the Yutjuwala Djiwarr Nhulunbuy flexible aged care facility in Nhulunbuy demonstrates the effectiveness of genuine collaborative partnerships. This \$29 million Commonwealth funded service opened in December 2022 after years of engagement with the Yolngu people of East Arnhem Land.

Through extensive engagement with the local community, a site was identified as a neutral place for the service that would be culturally safe for everyone. The design of the facility was informed by the community and Yolngu Elders, including the incorporation of culturally significant materials for construction. Timber used in construction of the facility was cut and milled at the Gumatj Sawmill, and plants were grown at a community nursery in Yirrkala. The Community and Elders arranged ceremonies to mark milestones in the development of the service, as well as conducting information sessions about the building design and employment opportunities.

The establishment of this service resulted in communities benefiting from opportunities for employment and development, with care workers and kitchen and cleaning staff being employed from the local community. A local cook was also appointed to ensure a culturally appropriate menu, and training was undertaken with Datjala Workcamp for gardener and maintenance roles.

Disability services – responding to thin markets

Enabling access to inclusive care and support to people with disability in their own community means they can maintain crucial connection to family, carers, friends and the wider community, as well as increase independence and improve social and economic participation. Across parts of regional Australia with low populations, thin markets – where there may be limited providers or access to services – require targeted approaches.³⁸

For people with disability who are in the National Disability Insurance Scheme (NDIS), lower plan utilisation rates may be impacted by limited providers and availability of local disability and other specialised health care services – leaving some NDIS participants with limited, or no, access to supports or certain types of services.

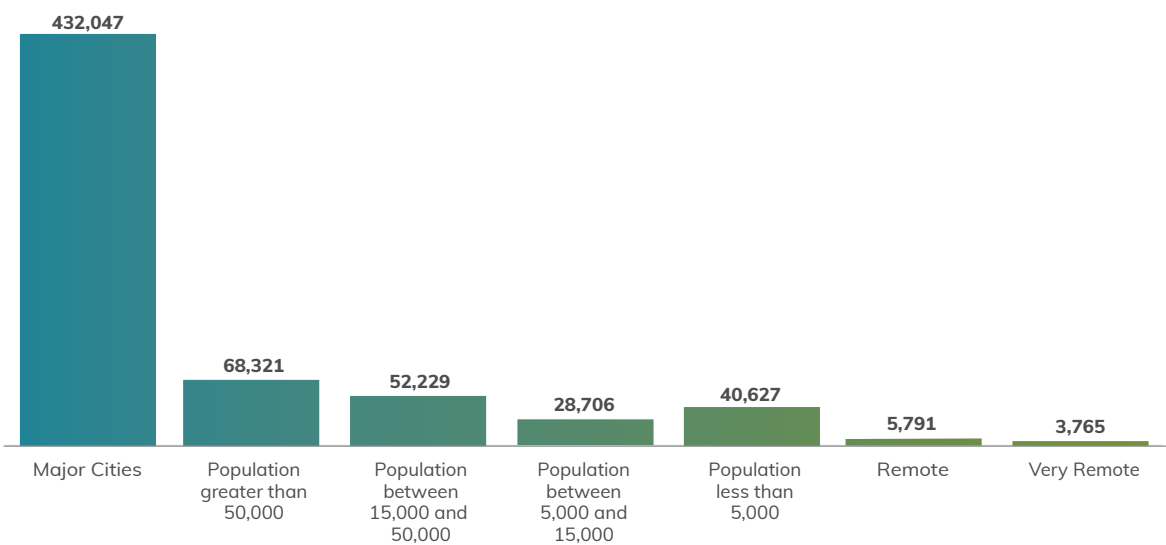
The majority of NDIS participants reside in major cities (Figure 19). Approximately 1.5 per cent of all NDIS participants reside in either a remote or very remote area.³⁹

“Insufficient staff in aged/disability care force many clients to leave the region which creates isolation and places a greater burden on those localities that do have places. If kept closer to family, support can be provided by family members, thereby reducing the level of external support required.”

RDA WHEATBELT (WA)



Figure 19: Number of NDIS participants by region, September 2023



Source: National Disability Insurance Scheme (NDIS), Explore data, All Australia, September 2023

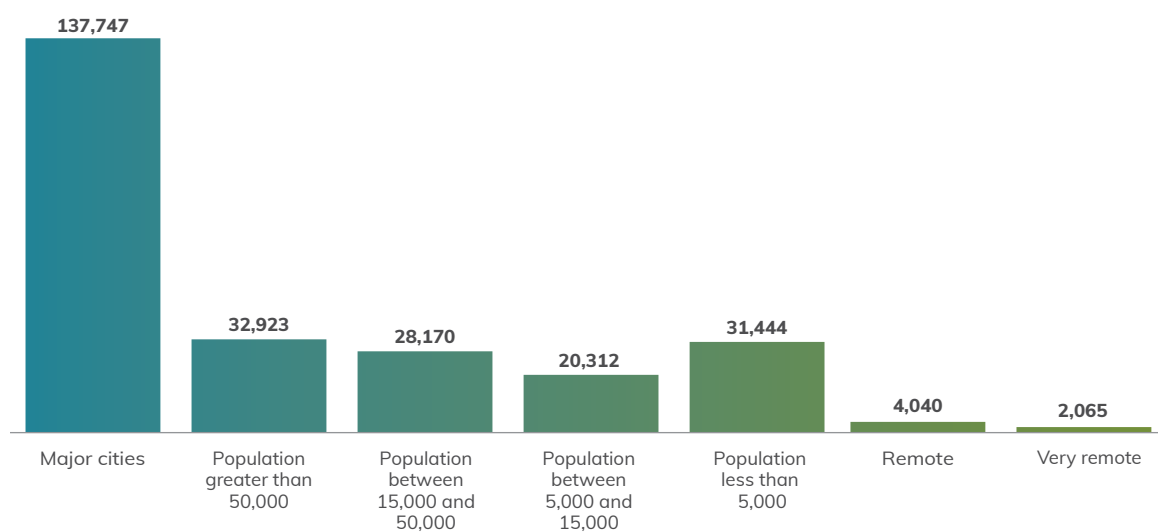


The majority of NDIS providers are servicing participants residing in major cities (Figure 20). The ratio of providers to participants in remote and very remote areas is higher.

Although gaps in accessing NDIS supports have improved in recent years, NDIS participants in very remote regions are more likely to have limited access to support services. Work is needed to address locations that do not have the population size to support disability providers to operate. The National Disability Insurance Agency continues to monitor the number of participants entering the NDIS who identify as First Nations, Culturally and Linguistically Diverse, and participants who are from remote and very remote areas.



Figure 20: Number of NDIS active providers by region, September 2023



Source: NDIS, Explore data, All Australia, September 2023

Snapshot of Government action

Australia's Disability Strategy 2021–2031

Australia's Disability Strategy 2021–2031 recognises all level of governments are responsible for supporting people with disability to reach their full potential, as equal members of the community. It appreciates that many services and systems for people with disability rely on governments working together, and sets out key outcome areas, policy priorities and an outcomes framework to drive collaboration. The Strategy recognises the importance of housing, infrastructure, education settings and disability services in creating inclusive communities so people with disability can actively take part in their communities.

Integrated Care and Commissioning

The Australian Government is undertaking the Integrated Care and Commissioning project to respond to community identified needs, and to help build a sustainable care and support sector. In the 2023–24 Budget, the Government provided \$27 million over four years from 2023–24 to improve the provision of, and access to, care and support services in thin markets by trialing integrated services and joint commissioning across primary health, First Nations health services, disability, aged care, and veterans' care sectors in up to 10 locations.

Alternative Commissioning

As part of the 2022–23 Budget, the Australian Government announced the "Alternative Approaches to Commissioning for Remote and First Nations Communities" initiative (Alternative Commissioning). Alternative Commissioning is about partnering with communities to pilot alternative approaches to improve access to NDIS supports in remote and First Nations communities. It will create opportunities for more culturally appropriate and sustainable services to strengthen the First Nations disability sector and build a sustainable supply of NDIS supports in remote areas.

Independent Review into the NDIS

On 7 December 2023, the independent review into the NDIS was released, making 26 recommendations with 139 actions to change the system that supports people with disability. This was following a meeting on 6 December 2023 where National Cabinet acknowledged the need for reforms to secure the future of the NDIS, ensuring it can continue to provide life-changing support to future generations of Australians with a disability. National Cabinet also agreed to design additional Foundational Supports to be jointly commissioned by the Australian Government and state and territory governments. The full Government response to the Review will be released in 2024.





Early Childhood Education and Care – vital for workforce participation

Quality, accessible early childhood education and care (ECEC) plays a central role in productive, sustainable regions. It is important not only for the start it gives to Australian children, but also for the participation and productivity benefits it supports for families, communities and local economies.⁴⁰

The availability of ECEC services is lower in regional and remote communities compared to major cities (Figure 21), with the Productivity Commission's *A path to universal early childhood education and care Draft report* (November 2023) estimating four in five children in remote Australia live in areas with fewer than one centre-based day care place per three children.

There are also ECEC workforce shortages across Australia, with the Jobs and Skills Australia 2023 *Skills Priority List Key Finding Report* (September 2023) including Early Childhood (Pre-primary school) Teacher and Child Care Worker as occupations in persistent shortage in 2021 to 2023. These shortages drive up the

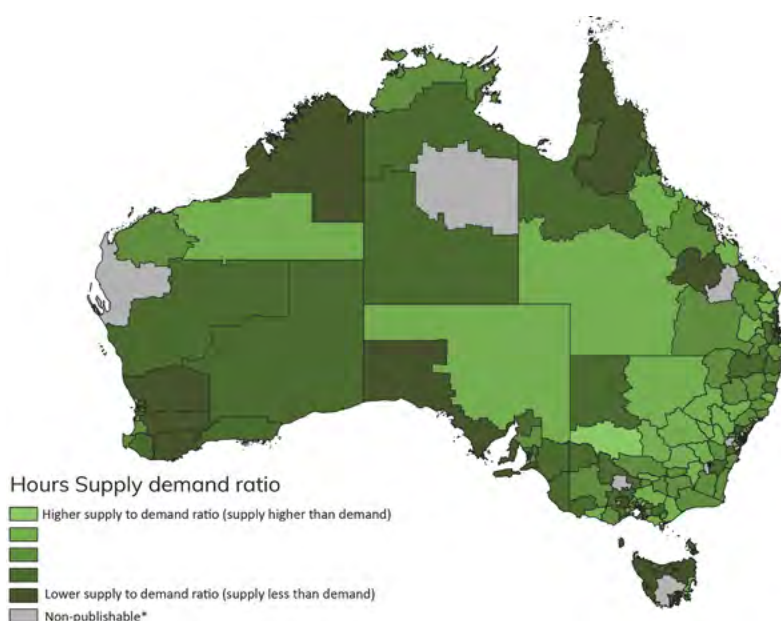
sector's labour costs in remote Australia, as noted by the Australian Competition and Consumer Commission *Childcare inquiry Interim report* (September 2023).

Improving access to ECEC will support greater economic growth and workforce participation, particularly for women. Two major inquiries are looking at the future directions of reform – one by the Productivity Commission to help chart a course towards universal access to affordable, quality ECEC, and the other by the Australian Competition and Consumer Commission into the market for the supply of services and investigating the drivers of ECEC costs. In addition, Jobs and Skills Australia is undertaking a capacity study on the workforce needs for Australia's ECEC sector.

“We have undertaken a study into child care on the Mid North Coast and have uncovered a significant need that is not met... 85.3 per cent of respondents (parental survey) stated that they are missing out on much needed work because they cannot get the child care they need.”

RDA MID NORTH COAST (NSW)

Figure 21: Early childhood education and care availability, ratio of supply to demand, June 2023



Source: Department of Education analysis of Child Care Subsidy administrative data and ABS 2021 Census of Population and Housing.
*Non-publishable regions have been removed to ensure confidentiality.

“ Access to housing and child care are the issues most frequently raised with our organisation.

RDA YORKE AND MID NORTH (SA)

“ Access to quality child care provides a fundamental role in facilitating communities to grow, integrate and support each other.

RDA EYRE PENINSULA (SA)



Snapshot of Government action

National Children's Education and Care Workforce Strategy

In recognition of the challenges facing the ECEC workforce, the Commonwealth, state and territory governments and the ECEC sector co-designed the 10-year National Children's Education and Care Workforce Strategy.

The Strategy includes 21 practical actions aimed at addressing the long-term and persistent issues impacting attraction, retention, and quality of the ECEC workforce that influence the availability of care. Seventeen actions have been accelerated and 13 are due to be completed by end of 2024.

Action 2-1 of the Strategy focuses on reviewing and developing targeted programs to support studies and placements for specified groups of potential educators and teachers, one of these groups being those from rural, regional and remote communities.

Cheaper Child Care

In July 2023, the Australian Government lifted the maximum CCS rate to 90 per cent for families earning \$80,000 or less, and increased subsidy rates for families earning less than \$530,000. These changes make ECEC more affordable for over 1.2 million families, with no families worse off. The Government also retained the higher rates of subsidy for families with two or more children in care.

In July 2023, the Government also introduced a base entitlement of 36 hours per fortnight of CCS for families with First Nations children, regardless of their family's activity, to encourage more families to engage in ECEC.

Community Child Care Fund (CCCF)

The CCCF supports around 900 services to reduce barriers to access, particularly for children and families in rural and remote communities experiencing disadvantage, First Nations communities, and where services are in limited supply.

The CCCF will deliver approximately \$611.3 million over four years from 2023, with more than 60 per cent of this funding over the next two years being used to support services operating in regional and remote Australia. This includes funding of \$16 million announced by the Government last year, to fund 47 new services across 38 communities in priority regional and remote parts of the country.

Under the upcoming CCCF Open Competitive Round Four grant opportunity, the Government will provide funding of up to \$84 million from 1 July 2024 to 30 June 2026 to help support ECEC services address barriers to participation, particularly targeting disadvantaged and vulnerable families and communities, and services in regional, remote and very remote areas.

Jobs and Skills Councils

As part of VET reform, the Australian Government has established 10 Jobs and Skills Councils (JSC) to identify skills and workforce needs for their sectors, map career pathways, develop contemporary VET training products, support training and assessment practice, and act as a source of intelligence on issues affecting their industries, including across rural, regional and remote areas. HumanAbility, is the JSC for the children's education and care, aged care and disability, health, human services, and sport and recreation sectors.

INDUSTRIES AND LOCAL ECONOMIES







Regional industries are a key contributor to the national economy and continue to evolve to leverage their natural strengths.

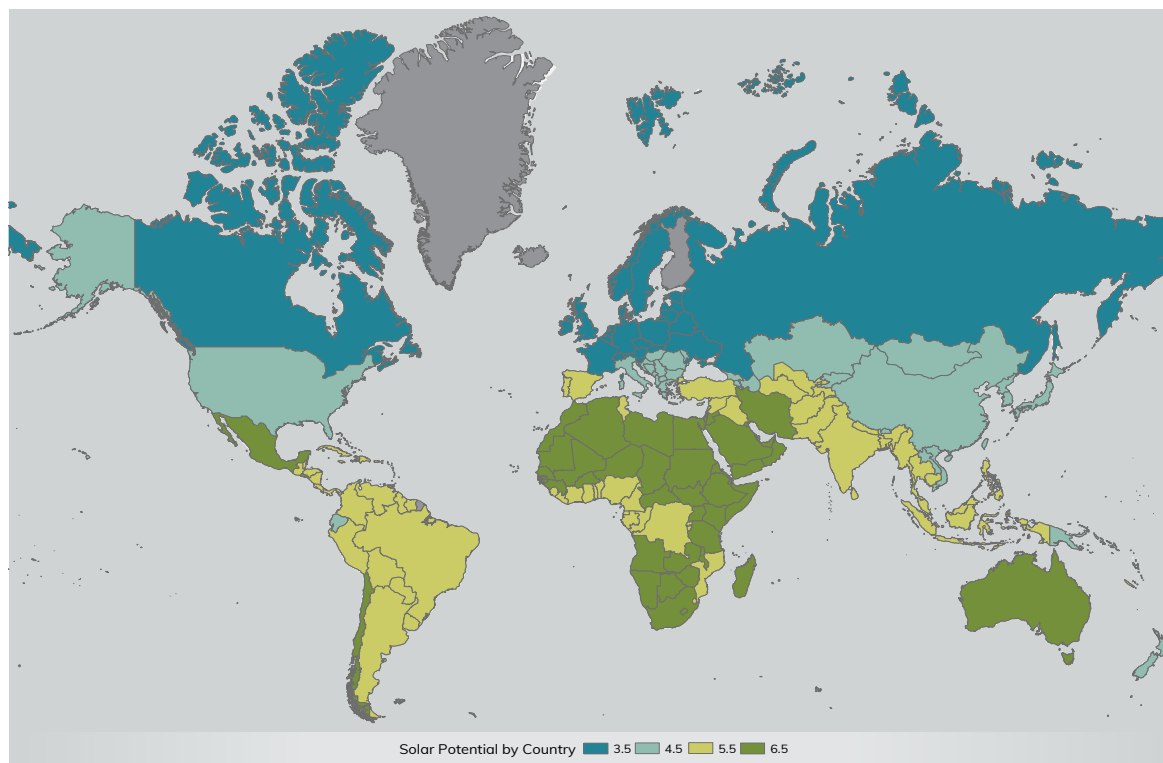
Ensuring regional industries and local economies are future-focused, sustainable and supported is essential for the continued growth of our regions.

Many regions are preparing for the global shift towards net zero emissions or adapting to changes in the climate and international markets. Regions see a role for Government in supporting regional economic transitions and communities as they adjust, including to coordinate policies and programs to help attract and leverage new clean energy industries, and support workers in emissions-intensive sectors to access new

employment and skills. The importance of a coordinating function, like the Net Zero Economy Agency, was reiterated by stakeholders at a Ministerial Regional Roundtable in mid-2023.

Regional communities are using their strengths to identify solutions to challenges by drawing on local knowledge and expertise. Whether it is recognising advancements within the critical minerals sector, or attracting tourists to a unique location – regions have the ability to draw on natural assets as a competitive advantage.

Figure 22: Solar energy generation potential by country, 2023



Source: World Bank, 2023

Energy transformation – *benefits of a net zero future*

Australia, particularly regionally, is uniquely placed to harness the opportunities from decarbonisation as the global economy transitions to net zero emissions. Many countries, including high emitting nations such as China, the United States, and India, have committed to net zero or emission reduction targets. Australia has committed to reduce greenhouse gas emissions by 43 per cent on 2005 levels by 2030, and achieve net zero emissions by 2050.

In combination, these worldwide commitments are rapidly growing global demand for clean energy, critical minerals, and green metals. This growing demand paves the way for Australia to benefit from decarbonisation due to our significant natural resources (including renewables, extensive mineral deposits and vast land mass); established industry and skilled workforce; world class regulatory, legal and financial systems; and credible reputation as a trusted export partner.

The net zero transformation is increasing demand for workers in a wide range of related industries, beyond core clean energy jobs. For example, employment in the National Electricity Market is forecast to increase by 19,000 jobs from 2023 to reach 63,000 jobs in 2039. Deloitte projections for Jobs and Skills Australia (JSA) show occupations key to the clean energy workforce will need to increase by around 30 per cent, or around 213,000 workers, by 2033. Australia will need almost 43,000 more electricians in the next 10 years alone. JSA projects that growth in employment from the net zero transformation is likely to be stronger in regional Australia than metropolitan Australia, reflecting the significant regional concentration of decarbonisation and clean energy growth opportunities.⁴¹

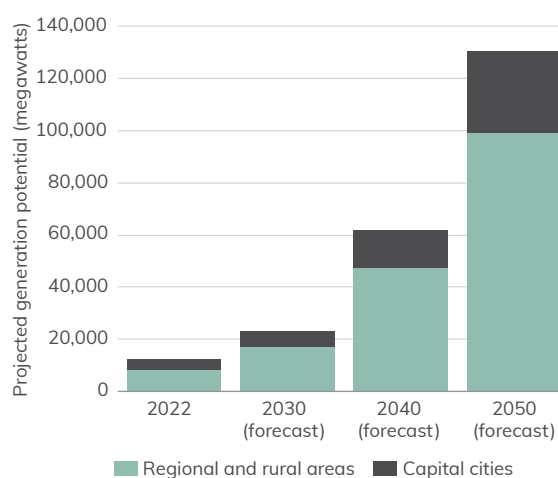
Australia's potential for solar resources far exceed most of the world, particularly other high-income nations with the capacity to commercialise clean energy opportunities. The world map (Figure 22) presents the average quality of solar resources that can be harnessed for electricity generation in each country. Clean energy is driving increased demand for Australian minerals. This demand and a strong, export oriented resources sector, enables Australia to be a potential leader in the clean energy global economy.

The economic opportunities from the net zero transformation will be considerable throughout regional Australia as noted in Figure 23. The regions are home to the majority of Australia's renewable energy resources and critical minerals. Forecast electricity generation in the Australian Energy Market Operator's Renewable Energy Zones is far greater in regional Australia than in capital cities.⁴² Economic growth in regional Australia will be further supported by a high concentration of occupations critical to the clean energy economy.⁴³

Gippsland remains committed to transitioning its powerhouse energy industry towards renewables to help address climate impacts and meet reduced emissions targets at both national and state levels. A key aspect to the success of this transition for the region are the job and skills opportunities it will bring for its people in the workforce and business through the supply chain, for the next generation and those previously employed in traditional energy.

RDA GIPPSLAND (VIC)

Figure 23: Projected renewable energy generation in Renewable Energy Zones, Australian forecast to 2050



Source: Australian Energy Market Operator, 2023



Snapshot of Government action

The Australian Government has implemented a range of initiatives to support our industries to adopt clean, and renewable alternatives, as well as grow new industries, delivering over \$43 billion to achieve this ambition. This funding will be used across a range of initiatives aimed at powering Australia with clean, cheap and reliable energy, including:

- establishment of a national Net Zero Economy Agency (Agency)
- development of a Net Zero plan
- \$20 billion Rewiring the Nation program to unlock investment in the electricity grid
- Powering the Regions Fund to support regional industry transition to net zero
- investment in new renewable energy and industry decarbonisation opportunities such as, the \$2 billion Hydrogen Headstart program, \$500 million Hydrogen Hubs program, 32 GW Capacity Investment Scheme, Offshore Renewable Growth Strategy and Safeguard Mechanism.

The Government is also developing a First Nations Clean Energy Strategy, and has committed \$83.8 million to deploying microgrid technology across Indigenous communities.

Net Zero plan

To achieve whole of economy emissions reductions, the Australian Government is developing a Net Zero plan, which will articulate how Australia will transition to a net zero economy by 2050, consistent with our international and domestic commitments. The plan will identify new policies and programs to support Australia's decarbonisation pathway.

The Government will develop six Sectoral Plans to reduce emissions across agriculture and land, electricity and energy, industry, resources, the built environment and transport; and will focus on the circular economy including cross-cutting issues for all sectors. The Sectoral Plans will feed into both Australia's Net Zero plan and the setting of a 2035 emission reduction target. The Government is engaging with First Nations people, communities, industry, academia and unions to develop the sectoral plans

Net Zero Economy Authority and the Net Zero Economy Agency

The Australian Government is establishing the Net Zero Economy Authority (Authority) to:

- catalyse and facilitate investment in new industries and jobs, particularly in emissions-intensive regions
- support workers impacted by the net zero transition, particularly workers in ageing coal power-stations and dependent mines, transition to new opportunities
- help to coordinate policy and program design and delivery for an orderly and positive net zero economic transformation, through advice to government and by working on-the-ground in key regions
- build community understanding, confidence and engagement with net zero economic transformation.

The Agency has been established as a precursor to a legislated Authority pending Parliamentary processes. An early focus of the Agency has been the regions undergoing transformation now, or imminently, driven by changes such as scheduled coal-fired power station closures and major new investments.

Skilling the clean energy workforce

The Australian Government has a number of initiatives underway to grow the capacity of the regional workforce, including \$17.8 million committed to the New Energy Skills Program. This whole-of-government approach will support the growth of regional clean energy skills. The Australian Government has also enhanced the Local Jobs Program to support transformation to a net zero economy. New place-based flexible funding pools will connect workers, and communities with new jobs and skills opportunities. Four employment regions have received additional on-the-ground resources to plan for, and optimise the opportunities for economic transformation.

Agriculture – an evolving market

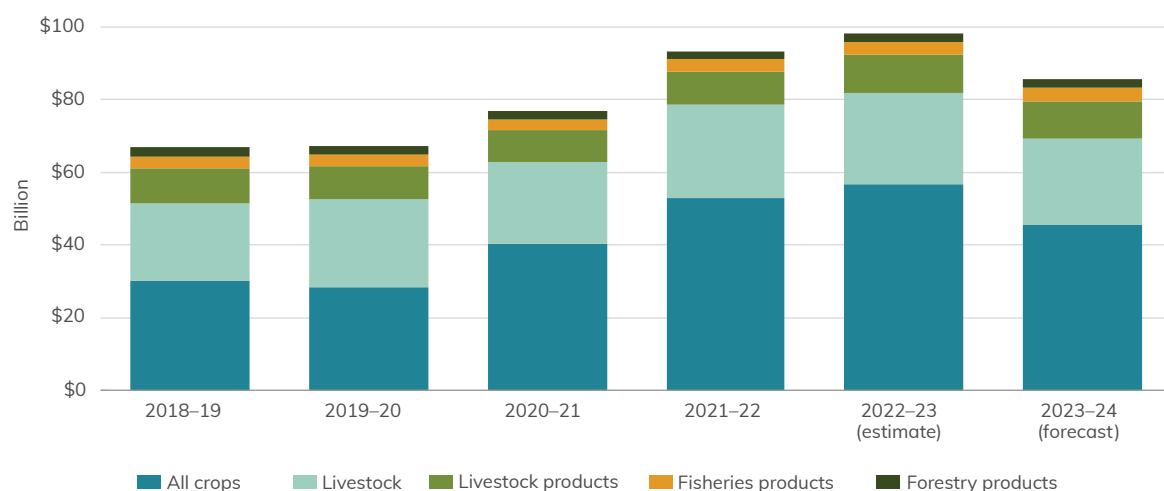
The value of agriculture, fisheries and forestry production has increased substantially in the past three years. 2020–21 to 2022–23 together represent the three highest production value years on record, moving towards the industry led objective of \$100 billion production by 2030. The increasing production value has mainly been driven by the cropping sector as excellent cropping conditions have resulted in bumper harvests. While the value of agriculture, fisheries and forestry production is forecast to fall in 2023–24 due to drier conditions, it is still expected to be the third highest result on record (Figure 24).⁴⁴

“The agricultural sector contributes significantly to the region’s economy through its industrial value-added, employment opportunities, and exports... We campaigned for this region to be a lead in gaining the [South Australia Drought Resilience Adoption and Innovation] hub to help our agriculture industry with research and development around their future innovation and drought resilience.

RDA FAR NORTH (SA)



Figure 24: Value of agriculture, fisheries and forestry production, 2018–19 to 2023–24



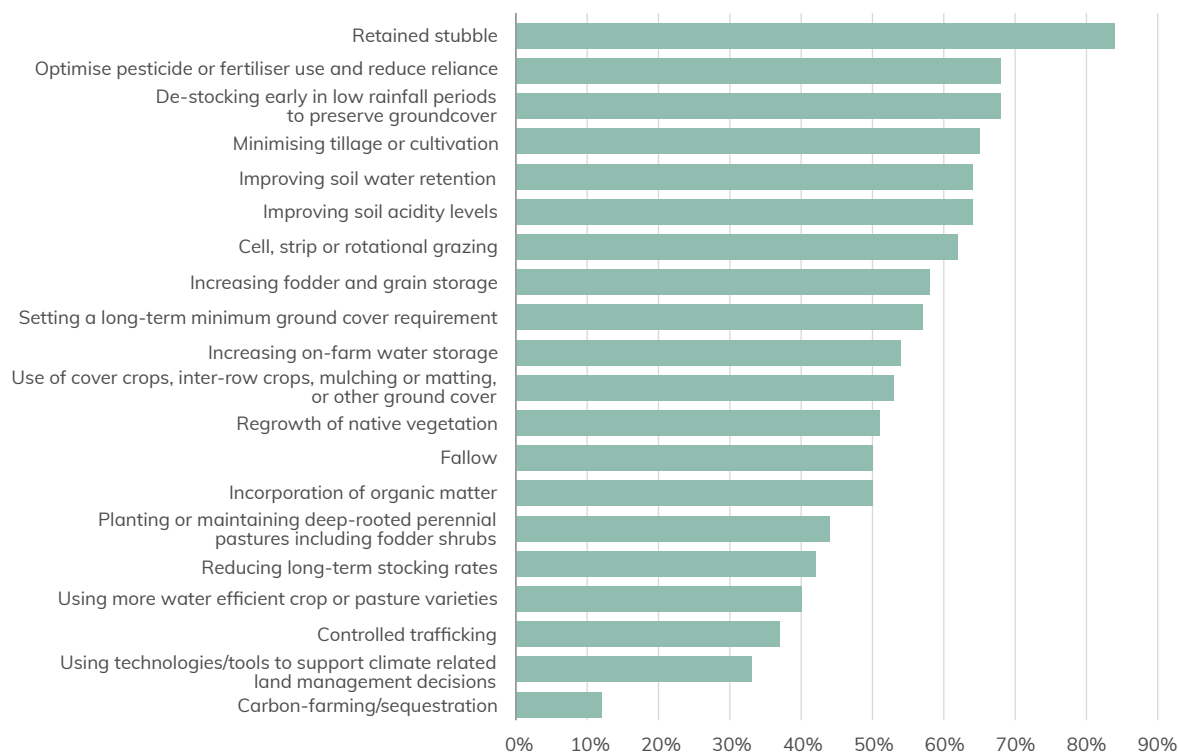
Source: ABARES Agricultural Commodities Statistics, December 2023



The agriculture sector continues to evolve and adapt – leveraging digital technologies and adopting climatesmart, sustainable innovations, including in drought resilience (Figure 25). However, there is a risk that despite advances, agricultural productivity growth may be outpaced by the impacts of climate change, including more frequent and severe natural disasters, localised changes to growing regions, and heightened biosecurity risks.^{45, 46, 47}



Figure 25: Farm use of techniques for natural resource management and drought resilience, 2021



Source: ABARES National Resource Management and Drought Resilience – survey of farm practices, 2021

Snapshot of Government action

National Statement on Climate Change and Agriculture

The Australian Government is committed to mitigating and adapting to climate change and supporting the future of agriculture. The first National Statement on Climate Change and Agriculture presents a unified vision and commitment from agriculture ministers to work in partnership with the sector. This collaboration ensures Australia will continue to lead the world in climate-smart practices by sustainably increasing agricultural productivity, improving adaptation and resilience to a changing climate, and implementing pathways to support low-emissions agriculture.

The Government is delivering on this shared vision and supporting farmers to manage climate risks by investing in on-farm natural capital and the adoption of sustainable natural resources management through the Natural Heritage Trust's \$302.1 million Climate-Smart Agriculture Program.

Future Drought Fund

The Future Drought Fund provides funding of \$100 million per year for drought resilience initiatives. It supports innovation, adaptability, proactivity and preparedness for resilience. Under the Drought Resilience Funding Plan 2020–2024, initiatives are funded to: improve access to climate information; build capability for farmers, local councils and regional stakeholders to develop resilience plans; support the development and use of new farming and land management practices; and drive local action to prepare for drought.

Regional Drought Resilience Planning

The Australian Government has committed up to \$40 million to the Regional Drought Resilience Planning Program, alongside co-contributions from state and territory governments. This Program supports the development of community-led drought resilience plans across agricultural regions, based on evidence and driving proactive management of risks. Over 65 regions across all states and territories are taking part and are at various stages of their planning journey.

Drought Resilience Adoption and Innovation Hubs

The Government has contributed \$89 million to the Drought Resilience Adoption and Innovation Hubs to support farmers and communities. There are eight regionally based centres spanning a variety of agricultural regions that bring together farmers, industry, business and experts to connect with the latest technologies and practices.

Securing the future of agricultural trade

The Government has committed \$104.3 million to support our agricultural commodity groups to navigate changes through stronger export and agricultural trade services. It builds on the Government's continued support to the agricultural sector with their goal to become a \$100 billion industry by 2030.

The Government is investing \$95.5 million over two years to sustain the delivery of key export trade and regulatory functions and develop an ongoing sustainable funding model. A further investment of \$8.8 million over two years will support the ongoing trade of live cattle with Indonesia and Malaysia, following temporary suspensions and restrictions to the markets in 2023.

Forestry sector support

A suite of forestry initiatives totalling over \$300 million is being delivered. The Support Plantation Establishment Program assists with the establishment of new long-rotation softwood and hardwood plantation forests in Australia to increase domestic timber supply and improve carbon outcomes. The Accelerate Adoption of Wood Processing Innovation Program will enhance the forestry sectors' ability to supply more of Australia's wood demands, improve the use of available wood supplies, and reduce its carbon footprint.





Industry – a key driver of the nation's economy

Regional industries make a significant contribution to the national economy. Several export-oriented industries such as agriculture, forestry and fishing and mining operate out of regional areas. Nine of Australia's top 10 exports are commodities or produce from our regions.⁴⁸

In addition to the contribution of physical commodities such as agriculture and mining to regional Australia, around a third of manufacturing employment (including in heavy industries) is found in regional communities – contributing to both local and national economies and supply chains. These businesses are supported by other sectors, including local professionals and financial services (Figure 26).

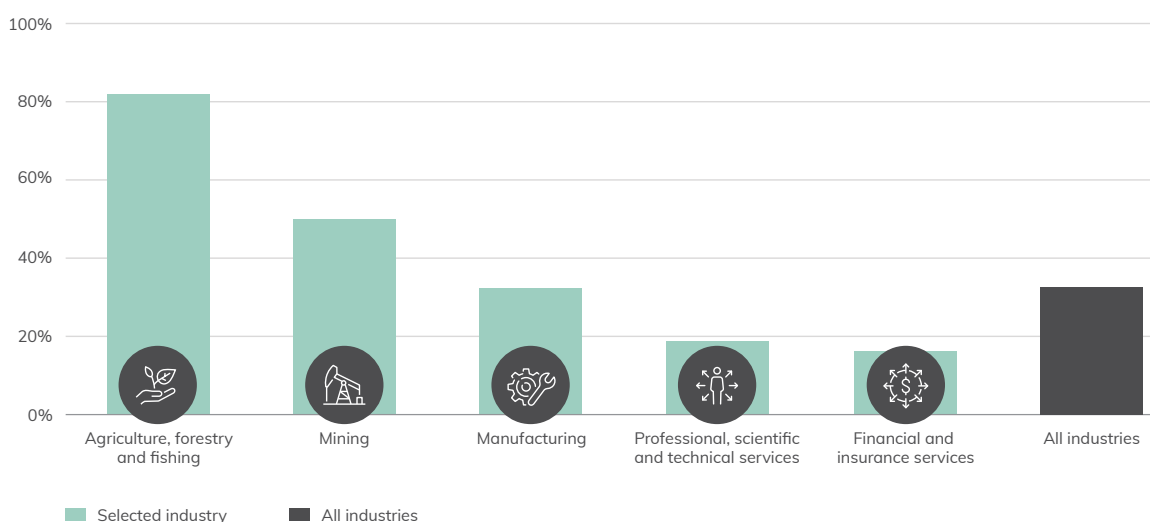
Australia's resources and mining sector is significant to the local economies across regional Australia, as well as contributing to Australia's transition to net zero. Our regions hold some of the world's largest recoverable resources of critical minerals. These resources are essential to modern technology and Australia has the ambition to be a major world supplier of raw and processed critical minerals.

Investment in the production of high value-added products grows Australian businesses, strengthens the international competitiveness of our industries, and creates higher paying, more sustainable jobs for regional Australians. In addition, Australia benefits from increased sovereign capability and resilience to supply chain shocks.

“The region will have leading capability in critical minerals and rare earths exploration, mining and processing to help enable the world's decarbonisation journey through future batteries technology and new energy materials.

RDA GOLDFIELDS ESPERANCE (WA)

Figure 26: Proportion of Industry employment located in regional Australia, August 2023



Source: Australian Bureau of Statistics, Labour Force, Detailed, Australia, August 2023



Snapshot of Government action

Critical Minerals Strategy

The Australian Government's Critical Minerals Strategy 2023-2030 sets out a vision to grow the nation's critical minerals industry. The Strategy aims to create jobs and downstream industries, strengthen global supply chains, and help Australia to become a renewable energy leader to contribute to global efforts to achieve net zero.

Australia's rich critical minerals endowments are dispersed across regional Australia. The Strategy provides a framework to guide policy decisions that will enable regional communities and economies to connect to and benefit from the growing domestic and global markets - for our raw and processed critical minerals.

Through the Strategy, the Government will work with industry, community, and state and territory governments to identify and consider infrastructure projects that could unlock large-scale investment and growth for the sector.

Last year, the Government announced it would increase the Critical Minerals Facility from \$2 billion to \$4 billion to support the growth of this sector and boost value-adding jobs in regional Australia.

National Reconstruction Fund

The Government has established the \$15 billion National Reconstruction Fund, one of the largest investments in manufacturing in Australian history. The NRF will co-invest into projects that build industrial capability and create jobs across seven priority areas of the economy identified by the Government. There is a strong regional focus across the priority areas, which includes value-add in agriculture, forestry and fisheries; value-add in resources; transport and low-emission and renewable technologies.

Industry Growth Program

The Government's new Industry Growth Fund, will support innovative small and medium enterprises in National Reconstruction Fund Government-identified priority areas - to commercialise their ideas and grow their businesses. There will be an additional focus on helping industry in these challenging development phases. Some businesses will be able to apply for matched grant funding of \$50,000 to \$5 million, as well as advice from industry experts.

Case study

AusIndustry Regional Managers network

AusIndustry provides a connection between small and medium size businesses and government.

For over 25 years, AusIndustry has continued to be a valuable hub, nurturing partnerships and networks, providing information and connections to help navigate government support to get the best for each business.

AusIndustry operates a network of 30 Regional Managers across the country, with more than 80 per cent of all businesses within 60 km of a Regional Manager. Regional Managers provide impartial, trusted guidance tailored to local businesses, taking the time to listen and understand each business's needs and identify support mechanisms to enable growth opportunities.



Tourism – building on regional strengths

Regional Australia is home to many of Australia's natural wonders. Attractions like the Great Barrier Reef, the Grampians, Uluru, and unspoilt coastal regions right around the country continue to draw both domestic and international tourism. Australia also has an abundance of unique locations and experiences that attract tourists to various parts of the country – including food and wine, Indigenous culture, our coastlines, mountain ranges and desert landscapes.

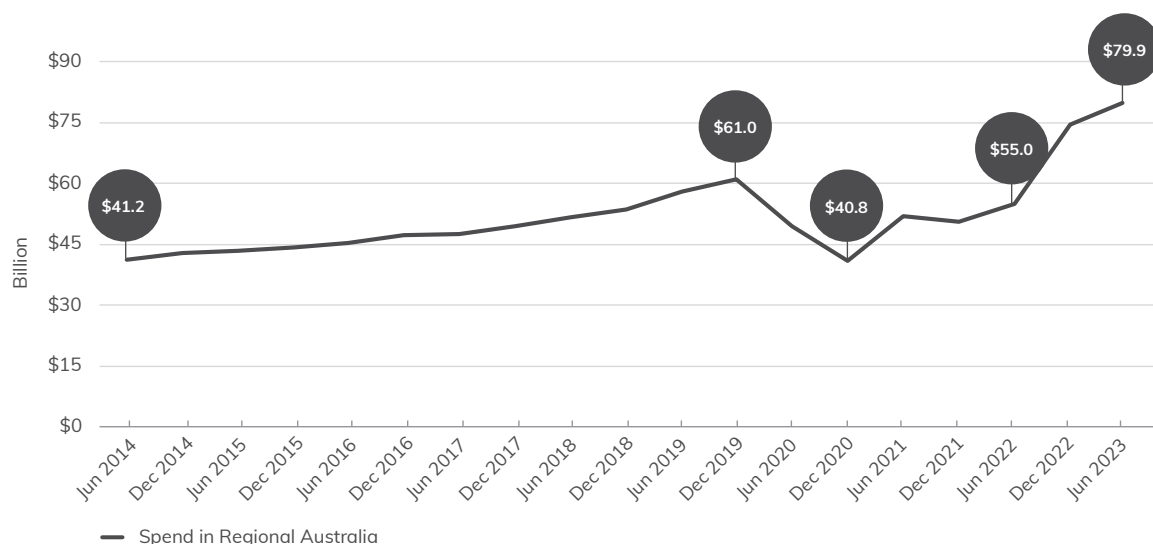
Aviation underpins Australia's tourism industry, supporting our regional and global economic interests and social connectivity. Australia has more than 100 air services agreements providing access to key international tourist markets and essentially unrestricted opportunities for international airlines to operate flights into international airports serving regional Australia.

Tourism in Australia's regions has surged since domestic and international borders reopened after the COVID-19 pandemic. Total visitor expenditure in regional Australia in the year to

June 2023 of \$79.9 billion was over 30 per cent higher than the pre-pandemic peak of \$61 billion in 2019 (Figure 27). The combination of a less severe impact from the pandemic in the regions followed by a regional led tourism sector recovery saw regional Australia's share of total tourism spend peak at 64 per cent in the year ending June 2021. Following the recent surge in regional tourism activity in the immediate aftermath of the pandemic, regional Australia's share of total trip expenditure is progressively normalising back to the 40 to 50 per cent range.

Tourism underpins a variety of businesses and supports jobs across regional Australia. There are more than 100,000 tourism-related businesses contributing 2.4 per cent to gross domestic product (GDP) on average across the regions, compared with a 1.2 per cent contribution to GDP on average in capital cities. As shown in Figure 28, for some regions – such as Lasseeter (NT), Kangaroo Island (SA) and East Coast (TAS) – tourism accounts for at least 20 per cent of their Gross Regional Product. Further, when assessed on the percentage of filled jobs in the region, six regions across four states rely on tourism to provide at least 20 per cent of the total number of filled jobs.

Figure 27: Total trip spend in regional Australia, 2014 to 2023



Source: Tourism Research Australia (TRA) National and International Visitor Surveys, year ending June 2023



First Nations-owned businesses are active across all parts of the visitor economy, sharing their intrinsic connections with lands, seas, waters and skies. In the 10 years from 2013 to 2023, the total number of domestic overnight trips incorporating First Nations cultural activities increased by 775,000 to 1.2 million trips in the year ending June 2023.⁴⁹

Tourism Australia's Future of Global Tourism Demand Report indicates that more than one in four global travellers are interested in Indigenous guided tours, one in five are interested in Indigenous Storytelling, and one in three are interested in visiting Indigenous sites or communities during their trip.⁵⁰

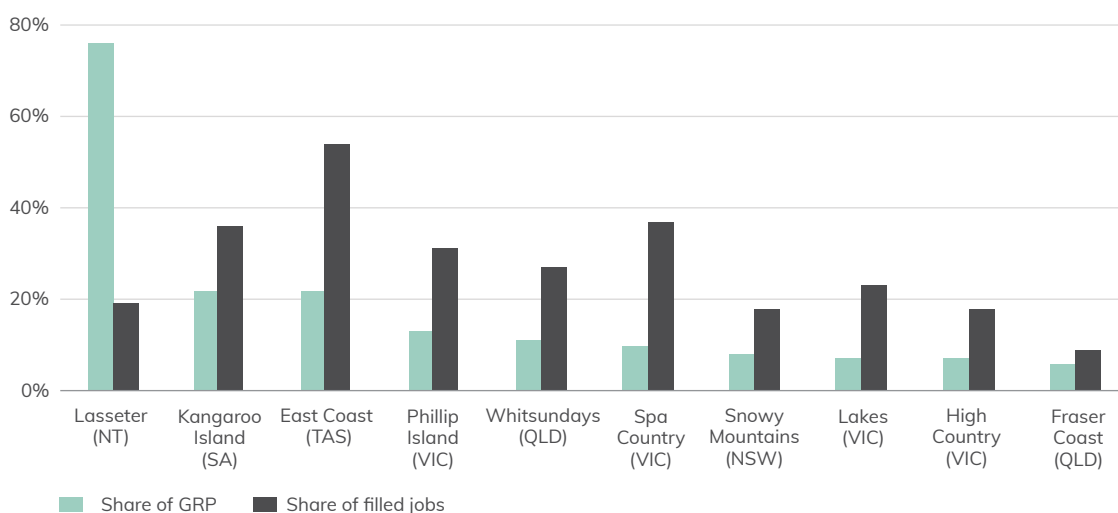
According to Tourism Research Australia, 2.5 million Australian and international visitors took part in an Indigenous tourism experience in 2019. This was a 42 per cent increase over 2013. Additionally, Australians spent more than \$3 billion on First Nations tourism activities in 2022, compared to \$1.3 billion by international visitors, almost 130 per cent more.⁵¹

Investment in cultural activities and infrastructure encourages cultural tourism and helps improve the liveability of regional areas. A thriving cultural and creative arts sector is essential to supporting Australia's regional communities and local economies for the one-third of Australians living in our regions. Regional arts invigorate local economies and support local jobs. Research commissioned by Regional Arts Australia has shown 70 per cent of arts attendees surveyed indicated the creative event they attended influenced their decision to travel to the local area and the direct economic impact generated by attendees was 60 times the government investment.⁵²

“Six LG's [Local Governments] are working to develop outback tourism around significant geological sites and to have the region recognised by UNESCO as a Designation Geo Region.

RDA MID WEST GASCOYNE (WA)

Figure 28: Tourism share of Gross Regional Product and jobs in top tourism regions, 2021-22



Source: TRA Regional Satellite Account for 2021-22



Case study

Wijingarra Tours

In the remote North West Kimberley region of Western Australia, Wijingarra Tours is providing a unique Aboriginal immersion experience on Country at Wijingarra Butt.

Specialising in boutique cruise ship tourism, Wijingarra Tours connects visitors, both local and international, to the traditions of the Worrora tribe, the original inhabitants of the land.

For Wijingarra Tours, it isn't just about showcasing the land's geology; it's a journey through history, culture, and the stories of the Worrora tribe.

Being located in such a remote region has made maintaining year-round tours difficult. With funding through the National Indigenous Australians Agency's Tourism Grants for Indigenous Business, Wijingarra Tours were able to install a solar-powered generator. This innovation proved crucial, enabling the Wijingarra staff to remain on-site throughout the peak tourism season. Previously, lack of power had posed significant challenges for the staff's well-being and operational efficiency.

With access to power, the team could now implement modern amenities like Starlink for stable communications, lighting in rooms, and proper food refrigeration. Wijingarra Tours isn't merely a tourism venture - it's also helping the preservation and protection of Indigenous culture in the region.



Snapshot of Government action

THRIVE 2030

THRIVE 2030 (the Strategy) is Australia's national strategy for long-term sustainable growth of the visitor economy. The Strategy highlights the importance of tourism to regional communities, generating jobs and providing services and amenities to people in the regions.

For the first time, a national tourism strategy includes specific regional visitor expenditure targets. THRIVE 2030 has an interim target of \$70 billion in regional visitor expenditure by 2024, and \$100 billion by 2030. The interim target has already been achieved.

Travel and Tourism Package – Caravan Parks Grant Program

The Government's Caravan Parks Grant Program is part of its \$48 million Supporting Travel and Tourism Package. The grant program is providing \$10 million to 112 caravan parks around Australia, located almost exclusively in regions, which will leverage more than \$30 million of investment in new visitor infrastructure. The development of the program and assessment of applications was a collaboration between the Australian and state and territory governments.

The Package also includes measures that will assist regional tourism operators to address challenges, such as worker shortages and upskilling their workforce, improve their business operations and innovation, and to attract more international visitors.

Additional assistance was provided to an iconic regional tourism destination through the \$15 million Tropical North Queensland International Tourism Recovery Program designed to drive growth in international visitation and support the tourism and travel sectors in Tropical North Queensland and the Great Barrier Reef.

First Nations Tourism

Participating in tourism offers First Nations business owners the opportunity to earn an income, employ community members and stay on Country. Recognising this important opportunity for First Nations people, the Government is supporting the growth of First Nations tourism under THRIVE 2030 including through:

- grant opportunities totalling \$9 million supporting over 160 First Nations tourism operators, including across regional areas to expand their tourism services
- a \$10 million tourism mentoring program, running to June 2025, delivering one-on-one tailored mentoring to help First Nations tourism businesses to achieve their organisational goals
- ongoing discussions with state and territory governments on potential co-investment with the Commonwealth on First Nations tourism projects
- co-designing with First Nations tourism industry leaders and state and territory governments, a new First Nations Visitor Economy Partnership to provide a national voice for First Nations tourism.

National Parks

National Parks play a critical role in attracting tourism to regions. Recognising the importance of protecting and preserving Australia's Commonwealth-managed National Parks, the Government has allocated \$262.3 million to address critical funding and infrastructure requirements including priority infrastructure improvements at Kakadu National Park, refurbishment of the Warradjan Aboriginal Cultural Centre, and environmental conservation in Booderee, Kakadu and Uluru-Kata Tjuta National Parks.

The Government has committed \$1.2 billion for reef protection and restoration programs. This funding is supporting projects to help the Reef adapt to climate change, improve water quality, protect marine life, and deliver world-class marine park management.



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© Commonwealth of Australia 2024
ISBN: 978-1-922879-20-2 (Print)
ISBN: 978-1-922879-21-9 (Online)

FEBRUARY 2024
INFRASTRUCTURE 5929

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