



ECONOMIC
DEVELOPMENT
STRATEGY **2022
2026**

INTRODUCTION FROM COUNCIL

We are pleased to release the Southern Downs Economic Development Strategy which will support and guide our region's economic development between 2022 and 2026.

This Strategy will enable Southern Downs to leverage our existing strengths in the pursuit of the significant opportunities for growth and prosperity for our region.

This Strategy presents the opportunity to diversify and grow the regional economy through the key pillars of Agriculture and Processing, Tourism and Events, Industry and Innovation and Population Attraction and Retention.

Council would like to offer sincere thanks to all the stakeholders who have contributed to the development of the Southern Downs Economic Development Strategy.

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VISION FOR SOUTHERN DOWNS

A dynamic and supportive place to do business with a diverse, innovative, prosperous and progressing economy including a thriving tourism sector.



EXECUTIVE SUMMARY

PURPOSE

The Southern Downs Region is perfectly placed to further diversify and grow its economy. The region is well located, being two hours from Brisbane and at the junction of two highways, with ample land that is appropriately zoned, access to resources and safe and liveable communities. This Economic Development Strategy provides the framework for how Council will help to realise the region's potential, increase the number of jobs and generate strong economic growth in the region.

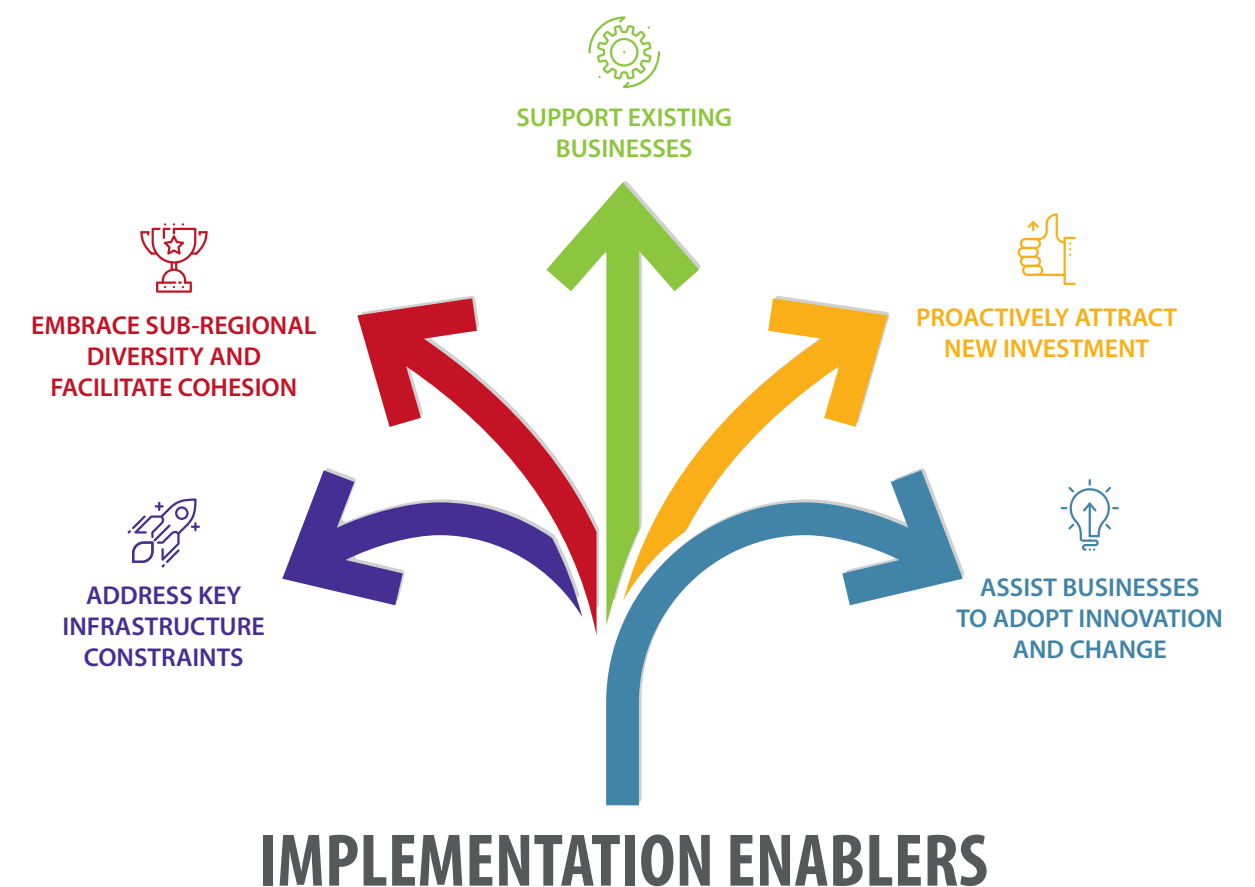
THE PILLARS

Key economic development opportunities for the Southern Downs were identified through a process of desktop assessments (profiling and opportunities analysis), direct consultation with regional stakeholders and completion of strategic prioritisation. As a result of this assessment, Southern Downs Regional Council is committed to fostering economic activity under the following pillars:



THE ECONOMIC DEVELOPMENT STRATEGY

The Southern Downs Economic Development Strategy is to be delivered through the following five key implementation enablers. Specific activities and initiatives are detailed in the Action Plan prepared for each year over the five year life of this Economic Development Strategy.



1. DEMOGRAPHIC OVERVIEW

The local population in Southern Downs has experienced drift stimulated by the COVID pandemic and associated higher rate of population since 2019 and modest population growth between 2006 and 2020, particularly in comparison to the greater Darling Downs region. Population projections for the region suggest stable growth over the coming decades – though these projections pre-date COVID which has, anecdotally, supported higher rates of population growth since 2019. Capitalising on this population growth is a key opportunity, and has potential to expand the regional workforce.

The local population has a relatively high average age and has experienced considerable ageing in recent years. This is consistent with anecdotal suggestions local youths are leaving the region to attend post-school education, due to a relative lack of post-school pathways within the region.

Labour pressures in the region are not isolated to highly skilled occupations but extend to un-skilled labour associated with key sectors, such as agriculture and tourism (including food and beverage services). Facilitating growth of these sectors, and supporting sectors, will be centred on access to skills in the region.

Households in the Southern Downs record a lower average annual income compared with the broader Darling Downs region, likely reflecting the local age distribution as well as

income levels associated with key industries.

The vast majority (88.7%) of the local dwelling stock is comprised of separate houses, however, some diversification into medium density housing has occurred in recent years. Population growth has placed upward pressure on the local housing market over the past year, with house prices 5.0% higher in the year ended March 2021 by comparison with March 2020, and rental prices across all dwelling types higher in the year ended June 2021. Access to housing was noted as a constraint to population attraction in consultations.



35,407 Population
Avg. Age 43 years



64.9% Family Households
\$64,759 Avg. Household Income

2. ECONOMIC OVERVIEW

The local economy, in terms of Gross Regional Product (GRP) is highly concentrated on the key sectors of construction, health care and social assistance and agriculture, with these three sectors comprising more than 40% of economic activity in 2019-20.

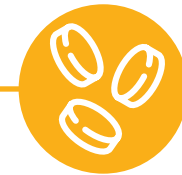
Employment in Southern Downs is focused on the agriculture, health care and social assistance and retail trade sectors, which together comprise more than 40% of employment in 2019-20.

Associated with the high reliance of the economy on relatively few sectors, the economy has experienced volatile economic growth in recent years, with growth ranging from -1.5% to 10.9% since 2016. Primarily this volatility is associated with fluctuations in the agriculture sector over the past decade.

Pursuing economic diversity has the potential to smooth the local business cycle, and is a clear opportunity for the region.

The local region records a relatively low unemployment rate, considerably lower than the state, and reflective of high demand for labour in the region.

Southern Downs records a high self-containment rate with the vast majority of residents working within the local economy.



\$2.02 billion Gross Regional Product
1.5% p.a. Economic Growth
(2001-20)



88.4% Residents Live and Work in Southern Downs
7.7% Residents Travel for Work



16,158 Persons Employed
1.0% p.a. Employment Growth



3. TOURISM AND EVENTS SNAPSHOT

Southern Downs is a tourism destination, with wineries and historical tours key attractions. The main townships each play a key role in the local tourism sector, with visitation to Stanthorpe driven by wineries and nature based tourism, and visitation to Warwick driven by events and festivals (Jumpers and Jazz in July and the Warwick Rodeo). Events in the region are supported by the Southern Downs and Granite Belt Events Strategy 2021-2026.

Visitors enjoy a broad variety of activities whilst in the region, but primarily undertake social activities (including eating out, shopping and sightseeing) and outdoor activities (including visiting national parks and hiking, attending Morgan Park Raceway and visiting Leslie Dam). This is consistent with the types of tourism activities offered in Stanthorpe and Warwick.

The arts, culture and sports sectors (including sporting events) are also supportive of the local tourism sector. Over the past five years, the region has attracted over 900,000 visitors on average per annum, the majority of whom (almost 60%) are domestic day trip visitors. Most commonly, visitors are holidaymakers and stay within the region for approximately 3 days.

Anecdotal evidence suggests the region has benefited from increased intra-state self-drive visitation since the onset of COVID.

Employment in the accommodation and food services sector comprised over 8% of total employment in the region and supported 3.5% of local economic activity in 2019-20.

The sector is a key opportunity for the region, given its existing position as a tourism destination, its geographical proximity to Brisbane, Toowoomba and northern New South Wales and the potential for increased localised travel in the coming years.

Multiple tourism businesses who are eco-certified with Ecotourism Australia operate tours that pass through the Southern Downs region. The natural beauty of the region is a core asset and expansion of eco-tourism has strong potential.

The Southern Downs tourism sector is widely supported by industry and community stakeholders who consider the sector to be of significant local importance. It is widely acknowledged the sector has a key role to play in diversifying the local economy.

Facilitating tourism growth as an economic opportunity will require access to skills (through population attraction and retention) and continued investment in related infrastructure and services (such as accommodation and food and beverage provision).



934,370 Average Annual Visitors
For: Holidays 46.2%
Visiting friends & relatives 32.0%
Business 5.7%

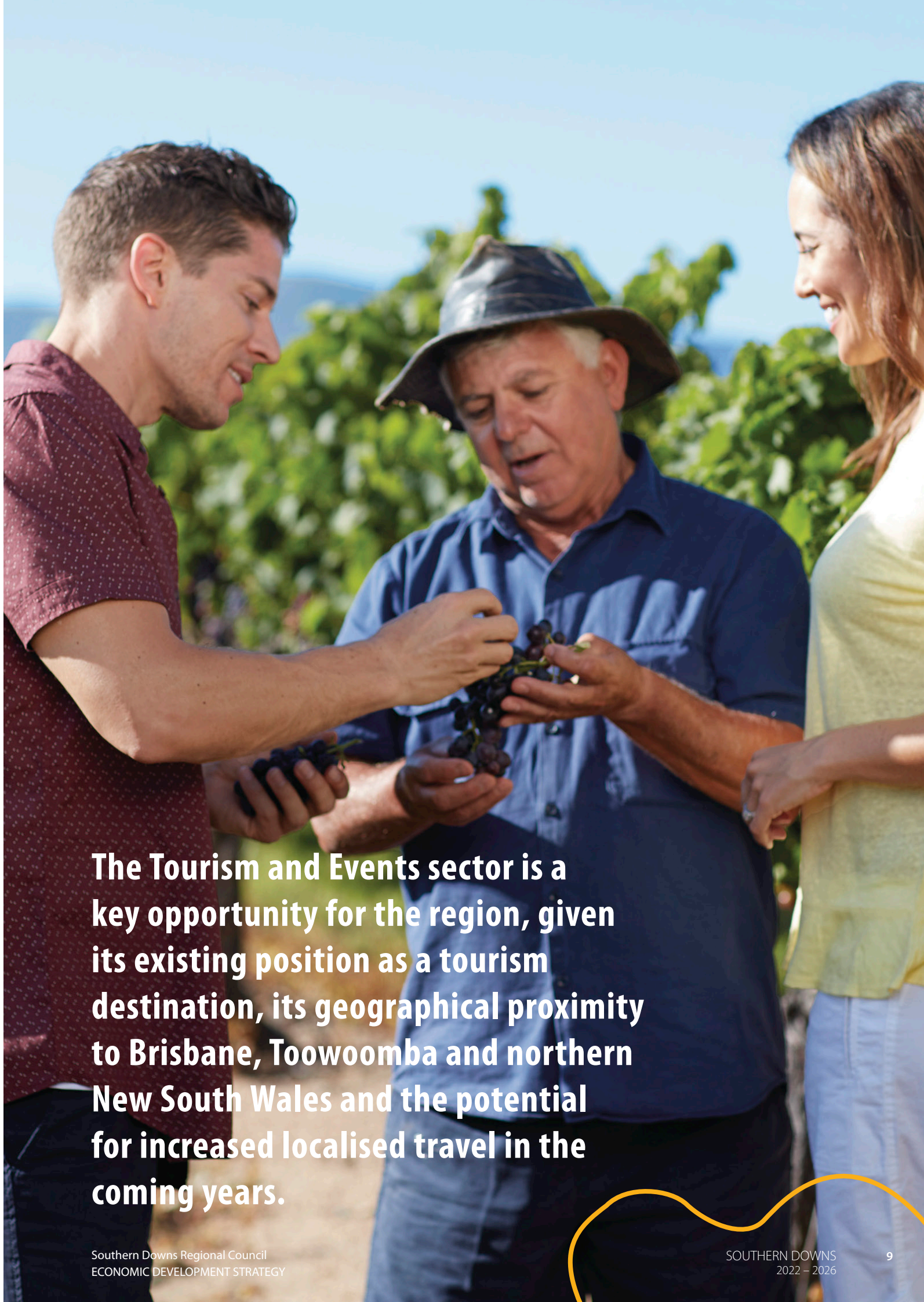


Average Length of Stay:
Domestic 3 days
International 38 days

Long International length-of-stay influenced by international seasonal workers (pre-COVID).



Tourism Activity Preferences
Social 26.3%
Outdoor/ Nature 22.4%
Local Attractions 20.9%



The Tourism and Events sector is a key opportunity for the region, given its existing position as a tourism destination, its geographical proximity to Brisbane, Toowoomba and northern New South Wales and the potential for increased localised travel in the coming years.

4. AGRICULTURE SNAPSHOT

Southern Downs is a highly regarded agricultural production region, producing a wide range of meat (cattle and calves, pigs, poultry, sheep), fruit (apples, peaches, strawberries and grapes) vegetables (tomatoes, capsicum, broccoli), and a variety of grains (maize, sorghum, barley).

Southern Down's production levels (in terms of value of production) are significant, comprising more than 10% of Queensland's fruit production, almost 10% of Queensland's vegetable production and 6.3% of Queensland's hay production in 2015-16.

Agriculture is a key industry for the Southern Downs, with the agriculture, forestry and fishing sector comprising almost 10% of industry economic activity and 17% of employment in 2019-20.

Local agriculture, forestry and fishing workers are marginally older than those across Queensland more broadly, reflecting the general age distribution of the region. Agricultural workers are primarily males (almost 70%), working full time (66%), with no higher education qualifications. The sector has benefitted historically from transient workers who have supported workloads in peak periods.

Agricultural activities are supported by meat product manufacturing, food product manufacturing and beverage manufacturing down-stream activities present in the region. The Southern Downs is supported by saleyards in its major centres, with cattle throughput at Warwick averaging approximately 75,000 head per annum.

Agricultural produce forms 23.0% of total value of exports from the Southern Downs local government area and food product manufacturing comprises a further 18.4% of total exports from the region.

The sector has faced challenges in recent years due to extreme weather patterns. Southern Downs was drought declared in May 2018. Though recent rains have provided relief to the region, water security is a key consideration for locals over the long term.

Despite these challenges, the agricultural industry is of regional importance and is anticipated to remain a cornerstone of the Southern Downs economy into the future.



Agricultural Production Value 2016:
Fruit - \$102.5m
Vegetables - \$65.8m
Cereal Crops - \$18.4m
Hay and Silage - \$8.7m



Sector Represents 17% of local Employment



42.3% from on-farm dams or tanks
3.8% recycled/re-used water

Sources: Profile.id (2021). Southern Downs Regional Council | Economic Profile. Available from: <https://economyid.com.au/southern-downs>. Last accessed 15 September 2021. QGSO (2018). Queensland Government population projections: Regions, 2018 edition (report). Available from: <https://www.qgso.qld.gov.au/statistics/themes/population/population-projections/regions>. Last accessed 15 September 2021. PHIDU (2020). Social Health Atlas of Australia: Data by Local Government Area. Published 2020. January 2020. Public Health Information Development Unit, Adelaide. AEC (unpublished). AEC Lifestyle Health Factors. ABS (2017). Water Use on Australian Farms, 2015-16. Cat no. 4618.0. Australian Bureau of Statistics, Canberra. ABS (2017). Water Use on Australian Farms, 2015-16. Cat no. 4618.0. Australian Bureau of Statistics, Canberra. Ecotourism Australia (2018). The Green Travel Guide. Available from: <https://greentravelguide.org/>. Last accessed 15 September 2021. Tourism Research Australia (2020). International Visitor Survey, 2020. Tourism Research Australia (2020). National Visitor Survey, 2020. ABS (2017). Agricultural Commodities, 2015-16. Australian Bureau of Statistics, Canberra. AEC (unpublished). AEC Liveability Indicators 2020. AEC Group, Brisbane.



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5. SWOT ANALYSIS

An overview of the Southern Downs Region's existing key strengths and weaknesses, as well as future opportunities and threats, are presented in the below SWOT analysis, informed through a desktop opportunity assessment, and refined through consultations undertaken in the region. The desktop opportunity assessment included consideration of location quotients (labour specialisations), future growth potential, import and export analysis, shift share analysis, an assessment of factors of production, consideration of local strategic assets, liveability assessment and population servicing assessments.

5.1 STRENGTHS

Lifestyle and Liveability: Southern Downs benefits from strong liveability, with local residents satisfied with local safety, neighbourhood and street appearance and affordable housing as well as good schools and good access to services.

Agricultural Lands and Produce: Southern Downs is well regarded as a prominent agricultural producer in Queensland, producing a broad variety of meat, fruit, grains and vegetables.

Tourism: Southern Downs is a tourism destination providing a broad range of experiences and products to visitors.

Export Infrastructure: Industry benefits from access to Toowoomba Wellcamp Airport and Brisbane's port which enables export to key domestic and international markets for key industries.

Labour Specialisations: Southern Downs boasts labour specialisations in the industries of agriculture, forestry and fishing; manufacturing; transport, postal and warehousing; retail trade; accommodation and food services; education and training; and personal services.

Natural Assets: Southern Downs is positioned in a scenic natural environment, and attracts visitors for activities such as bush walking, cycling, and camping. It also has access to Girraween, Main Range and Sundown National Parks, which attract bushwalkers and rock-climbers from across Australia and abroad. The region provides visitors, particularly those from within Queensland, the opportunity to experience four diverse seasons.

Education Infrastructure: Southern Downs boasts a variety of primary and secondary school education options, including both public and private institutions. The University of Southern Queensland, University of Queensland, Griffith University and TAFE Queensland also have a presence in the region.

5.2 WEAKNESSES

Access to Skilled Labour: Access to skilled labour is constrained within the region. Southern Downs records low labour specialisations in the industries of health care and social assistance; construction; electricity, gas and water services; rental, hiring and real estate services; administrative and support services; wholesale trade; and professional, scientific and technical services.

Infrastructure: Infrastructure development in the region has not kept up with population needs and industry growth. Infrastructure issues raised in consultations include those surrounding water, transport, sewerage, information and communication technology and digital connectivity, as well as cultural/ leisure/ tourism infrastructure.

Population Attraction and Retention: Like many regional areas, historically Southern Downs has faced difficulty in both attraction and retention of the local population. Local youths tend to leave the region to pursue higher education, contributing to the skills gap. Infrastructure developments are also required to sustain demand growth, particularly in the property market. The lack of diversity in housing is also a barrier to residential attraction.

Underprovided Services: Assessment of the current level of service provision in Southern Downs compared to similar comparison regions revealed the most underprovided services were those related to childcare, tertiary/ vocational education and training, recreation and community services, food and beverage retailing, specialist medical services, and professional services (such as accountants and solicitors).

5.3 OPPORTUNITIES

Deepening Supply Chains of Key Sectors: Downstream supply chain activities associated with key sectors are opportunities for import replacement and/ or expansion of existing industries in the region. Key examples include attraction and development of agricultural produce processing in the region to smooth the seasonality of production, and attraction of transport and logistics activities.

Support for Emerging Sectors: Southern Downs has an emerging renewable energy sector which provides opportunities to improve the local green economy, including solar power, bio-gas, wind or recycling/ resource recovery.

Enhancement of Key Existing Pillars: The existing pillars of agriculture and tourism and eco-tourism are broadly

supported within the region. Providing further support to these sectors is a core opportunity for economic development in the region.

COVID-19 Impacts: Southern Downs has the potential to capitalise on key trends emerging from the COVID-19 pandemic. Regional population growth has benefited from both population attraction and retention over the past 18-months, supporting access to skills and workforce in regional areas. Border closures have resulted in increased intra-state travel, benefiting regions such as Southern Downs which are within close geographical proximity to key population centres. The longevity of these impacts is yet to be determined, but in the short term these factors should be leveraged.

Population Supporting Services: Capitalising on recent population growth will require proactive attraction of population supporting services such as education and training, healthcare (allied health) as well as additional housing and community infrastructure.

Collaboration Opportunities: Council has an opportunity to collaborate with the community and celebrate the unique nature of key townships within the region.

5.4 THREATS

Water Security: Southern Downs' high reliance on the agricultural sector is threatened by the region's water security issues. Drought proofing, lengthening of shelf-life through value added processing, and diversification of local industries (including agricultural product) are opportunities to reduce seasonality impacts on the region's primary economic sector.

Future Underprovided Services: Assessment of the future and aspirational levels of service requirements in Southern Downs reveals services with existing service gaps, if unaddressed, are likely to experience further strain from population and visitation growth.

Community Cohesion: The community is still coming to terms with the amalgamation in 2007. Internal competition for limited resources is a threat to overall economic development of the Southern Downs region, and there is an opportunity for Council to provide leadership in facilitating greater cohesion and collaboration within the community.



6. ECONOMIC PILLAR PRIORITISATION

Opportunities identified through desktop opportunity assessment and consultations undertaken in the region have been prioritised, based on the degree to which they meet Southern Downs Regional Council's objectives. These objectives included:

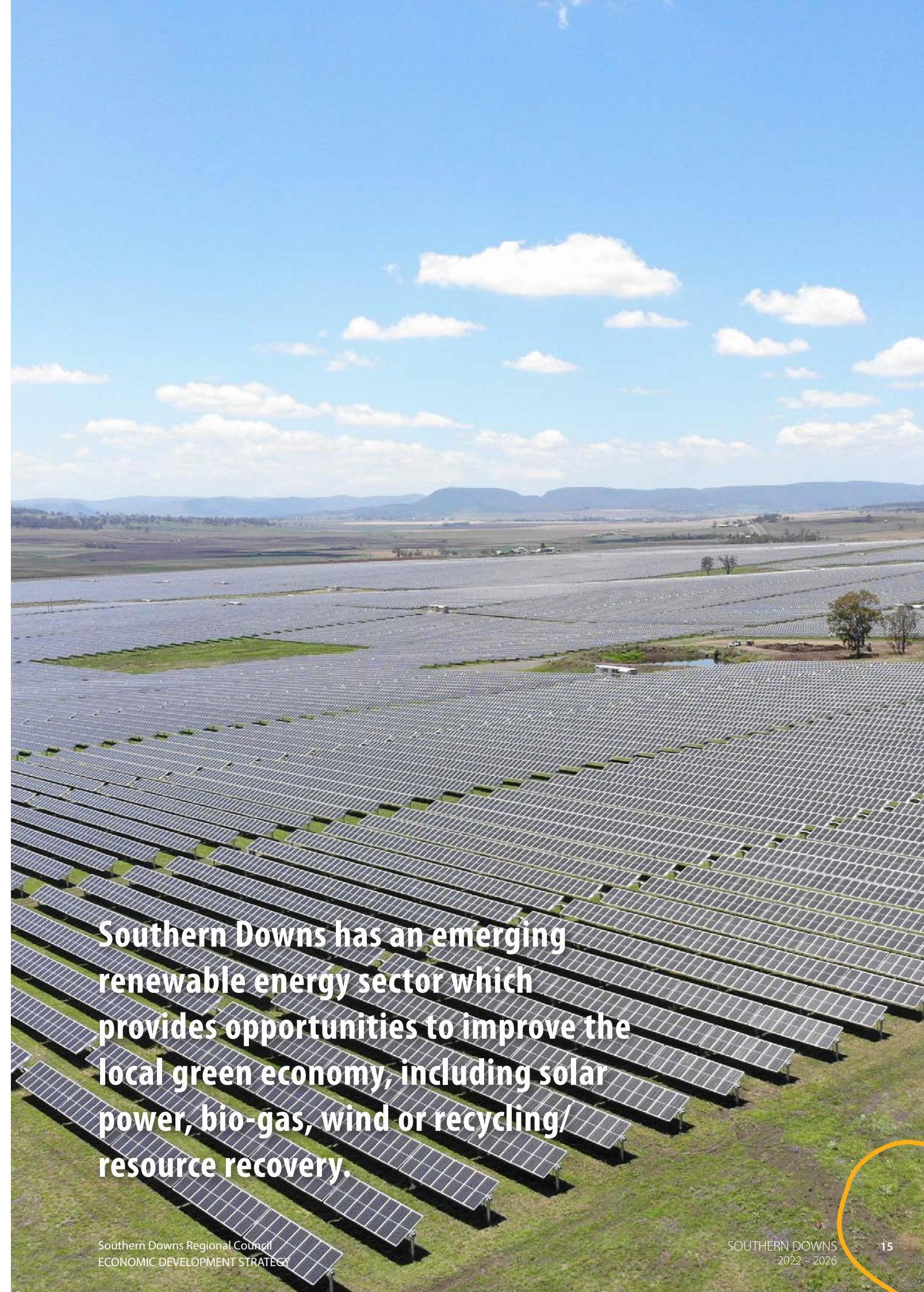
- Position as an existing pillar – Agriculture, Tourism and Eco-Tourism (Yes = 1, No = 0).
- Supportive of Council's focus areas – People, Places, Prosperity, Performance (1 point for each objective met).
- Improves liveability and resident attraction (Yes = 1, No = 0).
- Leverages the region's existing strengths and natural advantages (Yes = 1, No = 0).
- Mitigates the regions weaknesses (Yes = 1, No = 0).

- Stimulates growth in economic activity, diversity and employment (Yes = 1, No = 0).
- Creates economic resilience to external shocks (Yes = 1, No = 0).
- Is aspirational and ambitious (Yes = 1, No = 0).
- Meets infrastructure needs (Yes = 1, No = 0).

As a result of this assessment, and based on the final summary score, it is recommended Southern Downs Regional Council pursue the pillars of Agriculture and Processing (processing is a core opportunity for improving the supply chains for agriculture), Tourism, Renewable Resources and Population Attraction and Retention within this Economic Development Strategy.

Opportunity	Existing Pillar	Supports Council Focus Areas*	Improves Liveability and Resident Attraction	Leverages Strengths and Advantages	Mitigates Weakness	Stimulates Economic Activity	Creates Economic Resilience	Aspirational and Ambitious	Meets Infrastructure Needs	Summary Score
Agriculture										
Support and Expansion of Existing Agriculture	1	1	0	1	0	1	0	0	0	4
Diversification of Agricultural Production	1	1	0	1	0	1	1	0	0	5
Food Co-Operatives	1	1	0	1	1	1	1	0	0	6
Environmental Stewardship	1	2	0	1	0	1	1	1	0	7
Tourism and Eco-Tourism										
Expansion of Business Tourism	1	1	0	0	1	1	1	1	0	6
Attraction of Accommodation Investment	1	2	0	0	1	1	0	1	1	7
Paddock to Plate and Experiential Dining	1	2	0	1	1	0	0	1	0	6
Undertake Regional Marketing and Branding	1	1	0	0	1	1	1	1	0	6
Increased Nature-Based Tourism	1	1	0	1	0	1	0	0	0	4
Increased Cycling Tourism	1	1	0	0	1	1	0	0	0	4
Agri-Tourism	1	1	0	1	0	1	0	1	0	5
Value Added Manufacturing										
Meat Product Manufacturing	0	1	0	1	0	1	1	0	0	4
Grain Processing	0	1	0	1	0	1	1	0	0	4
Beverage Production	0	1	0	1	0	1	1	0	0	4
Fruit and Vegetables Processing	0	1	0	1	0	1	1	0	0	4
Transport and Logistics										
Road Transport	0	1	0	0	0	1	1	0	0	3
Warehousing and Storage Services	0	1	0	0	0	1	1	0	0	3
Renewable Resources										
Renewable Energy (Solar)	0	3	0	1	0	1	1	1	1	8
Renewable Energy (Biogas)	0	3	0	1	0	1	1	1	1	8
Recycling/ Resource Recovery	0	2	0	1	0	1	1	1	1	7
Population Services										
Education and Training (Post-School)	0	3	1	0	1	1	1	0	1	8
Health Care and Social Assistance (Allied Health)	0	3	1	0	1	1	1	0	1	8
Invest in Community Infrastructure - Cycleways / Walkways	0	2	2	1	1	0	0	0	1	6
Invest in Community Infrastructure - Youth Infrastructure	0	2	2	1	1	0	0	0	1	6

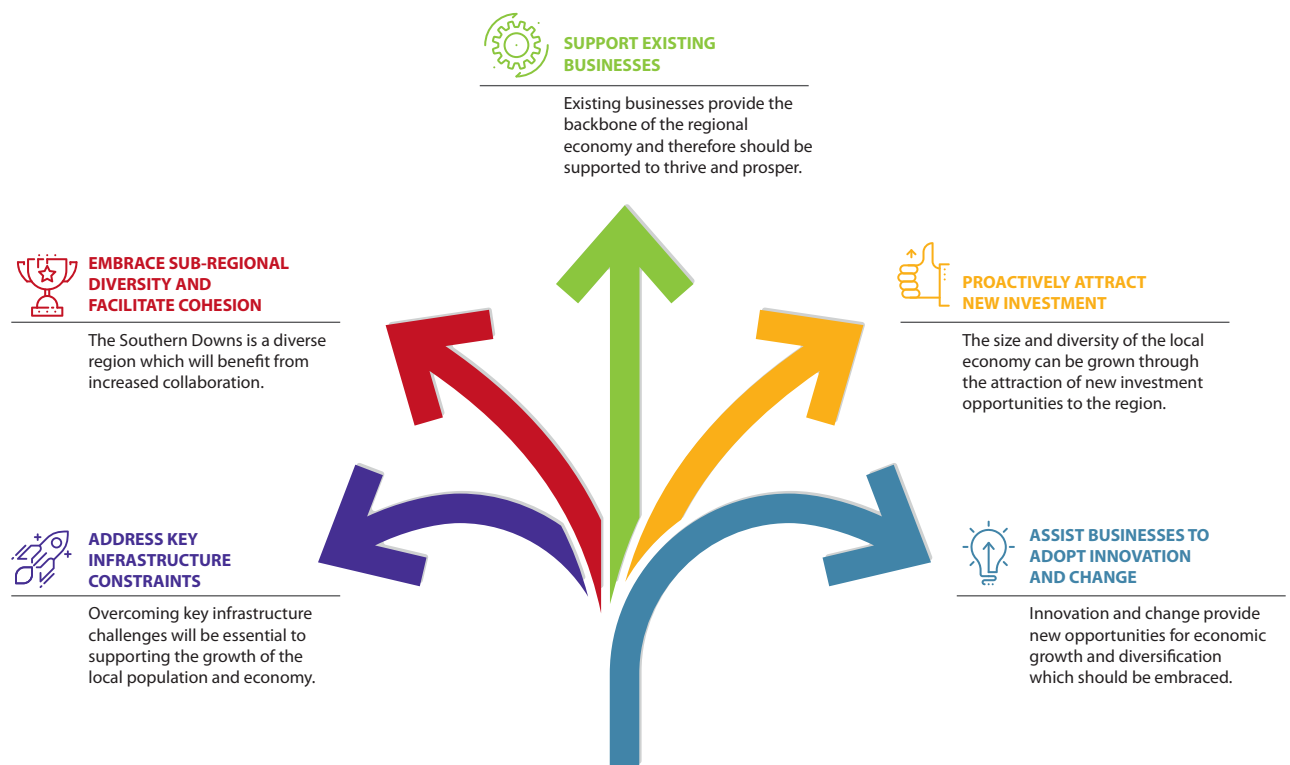
Note: *People, Places, Prosperity, Performance



Southern Downs has an emerging renewable energy sector which provides opportunities to improve the local green economy, including solar power, bio-gas, wind or recycling/resource recovery.

7. IMPLEMENTATION ENABLERS

Leveraging the findings of the desktop analysis, opportunity assessment and consultation findings, the following five implementation enablers have been identified to guide economic development activities within the Southern Downs. These five implementation enablers provide the focus of the Southern Downs Economic Development Strategy and will be delivered through the Action Plan prepared for each financial year over the five year life of this Economic Development Strategy.



Southern Downs is well regarded as a prominent agricultural producer in Queensland, producing a broad variety of meat, fruit, grains and vegetables.

8. STRATEGIC IMPLEMENTATION

The following tables outline key facets of each component of the strategy. These tables are supported by an annual Economic Development Strategy Action Plan.

8.1 PROACTIVELY ATTRACT NEW INVESTMENT



Detail	Description
Objective	Attracting new investment to the region will enhance the economic diversity and sustainability of the region. Proactive attraction should be undertaken and a range of non-financial incentives should be developed to support Southern Downs Regional Council's ability to attract desirable industry and investment.
Council's Role	Facilitator, Supplier of Services, Planning and Regulation
Action Areas	Proactively engage with sought after business and industry. Investigate opportunities for non-financial investment attraction incentives. Provide guidance and transparency on planning and regulations for businesses.
Evaluation	Number of local businesses. Total employment. Gross Regional Product.
Implications	Attracting new business activity to the region is likely to have implications in terms of: <ul style="list-style-type: none"> • Increased supply and diversity of skills in the region. • Increased investment activity and potential strengthening of local supply chains. • Shift in economic structure and activity within the region. • Increased demand and use of export and import access points and infrastructure.

8.2 SUPPORT EXISTING BUSINESS



Detail	Description
Objective	There are approximately 4,000 existing businesses within the Southern Downs region. Supporting existing businesses to expand and develop is a key component of economic growth.
Council's Role	Facilitator, Supplier of Services, Planning and Regulation
Action Areas	Investigate and maintain a jobs, training and recruitment attraction landing page. Facilitate networking and clustering events. Undertake review of key business constraints.
Evaluation	Employment. Average business size.
Implications	Supporting existing business is likely to have implications in terms of: <ul style="list-style-type: none"> • Increased revenue generation and productivity gains. • Increased investment activity and potential strengthening of local supply chains. • Increased demand and use of export and import access points and infrastructure.

8.3 EMBRACE INNOVATION AND CHANGE



Detail	Description
Objective	Innovation and change provide new opportunities for economic growth and diversification which should be harnessed and proactively pursued.
Council's Role	Advocate
Action Areas	Actively participate in government and private sector networks which promote innovation and assist businesses access such networks. Engage with businesses and establish connections with business innovation and change processes.
Evaluation	Number of startup businesses in the region. Number of businesses seeking grants and other funding arrangements to support innovation.
Implications	Embracing innovation and change will serve to: <ul style="list-style-type: none"> • Increase supply and diversity of skills in the region. • Increase regional investment activity. • Shift economic activity within the region.

8.4 INFRASTRUCTURE ENABLERS



Detail	Description
Objective	Key infrastructure challenges for the region centre on availability and quality of road, water and digital infrastructure in the region. Ensuring adequate and appropriate access to infrastructure will support economic and population growth going forward.
Council's Role	Advocacy
Action Areas	Advocate to State and Federal Government for key infrastructure needs such as: <ul style="list-style-type: none"> • transport infrastructure • water, sewerage and waste infrastructure • digital infrastructure • enhanced education and training infrastructure and services Investigate and advocate for innovative mechanisms for infrastructure growth.
Evaluation	Value of infrastructure investment attracted to the region.
Implications	Implications of increased infrastructure provision include: <ul style="list-style-type: none"> • Increased attractiveness of the region to potential investors. • Increased livability for current and future residents.

8.5 FACILITATE BUSINESS COHESION AND COLLABORATION





Detail	Description
Objective	The amalgamation of the local government areas over a decade ago remains current in the minds of the local businesses and community. Each sub-region within the Southern Downs is unique in its own way and should be celebrated as such, but there is an opportunity for the community to be more cohesive.
Council's Role	Facilitator
Action Areas	Facilitate interactions between sub-regional organisations and businesses. Celebrate regional success stories under the Southern Downs brand. Facilitate transparency and cohesion across the region.
Evaluation	Proportion of community recognising and associating with Southern Downs LGA. Proportion of community indicating trust in Southern Downs Regional Council.
Implications	Implications of sub-regional diversity and cohesion include: <ul style="list-style-type: none"> • Increased reporting requirements and measurement of progress against key strategies. • Increased social media presence and branding activities as Southern Downs Regional Council. • Increased engagement with businesses across the region.

9. IMPLEMENTATION AGAINST PILLARS

The following actions are recommended to pursue the prioritised pillars of Agriculture, Tourism and Events, Industry and Innovation and Population Attraction and Retention.



Detail	 Agriculture & Processing	 Tourism & Events	 Industry & Innovation	 Population Attraction & Retention
Rationale	Agriculture and Processing is a core sector within the Southern Downs economy. Supporting the existing sectors of the economy and encouraging diversification of their activities is fundamental to the future growth of the region. Processing is a core opportunity to assist in future-proofing this sector.	Southern Downs is a tourism destination in its own right. Providing support to the sector will assist in ensuring expansion and growth into the future. Support should be provided in conjunction with existing strategies, such as the Southern Downs and Granite Belt Events Strategy 2021-2025.	With proximity to major population centres, available land and high-quality transport linkages, Southern Downs is very well positioned to attract industry. Renewable resource investments are further opportunity to leverage the open spaces, green perception and existing industry within the region.	Attracting and retaining population is a key focus for Council. Ensuring availability of appropriate housing and services is essential and would further support skills development in the region.
Focus Areas	<ul style="list-style-type: none"> • Diversification of agriculture • Drought resilience • Intensive agricultural production • Environmental stewardship opportunities • Food and beverage value-add processing 	<ul style="list-style-type: none"> • Business tourism attraction • Investment in accommodation • Marketing and branding • Nature based and active tourism • Agri-tourism 	<ul style="list-style-type: none"> • Strategic protection and development of industrial land • Attraction of major industry and manufacturing initiatives • Attraction of renewable energy projects such as solar, wind and bio-gas • Recycling/ resource recovery • Assessment of opportunities in the minerals and mining sector 	<ul style="list-style-type: none"> • Marketing and branding of the region • Post-school education and training services and infrastructure • Health care and social assistance (allied health) • Community infrastructure investment
Potential Partners	Existing businesses, Growers Groups, Chambers of Commerce, Regional Agricultural Leaders Group, DAF, AgForce, QFF	Existing businesses, Progress Associations, Southern Queensland Country Tourism, Eco-tourism working group, Granite Belt Wine Tourism	Large footprint industry, new and existing businesses, Large scale renewable projects, Waste Recovery Working Group, Granite Belt Sustainable Action Network	Existing businesses, Progress Associations, Chambers of Commerce
Council's Role	Advocacy, Facilitation	Advocacy, Facilitation	Advocacy, Facilitation	Advocacy, Facilitation
Pre-Existing Conditions Required	<ul style="list-style-type: none"> • Access to water • Engaged and collaborative business community open to new ideas and methods 	<ul style="list-style-type: none"> • Demand and interest in eco-tourism • Access to investors and funding • Detailed demand data 	<ul style="list-style-type: none"> • Access to investors and funding 	<ul style="list-style-type: none"> • Identified target markets and population sources for attraction
Complexity	Moderate	Moderate	Moderate/ High	Moderate
Action Areas	<ul style="list-style-type: none"> • Proactively attract new investment • Development of a regional Protein Hub • Work directly with Southern Queensland Landscapes, State and Federal agencies to connect regional landholders with emerging environmental stewardship opportunities • Advocate for improved water security for the agricultural industry 	<ul style="list-style-type: none"> • Work with regional partners to undertake targeted branding and marketing activities • Investigate gaps in accommodation provision • Engage tourism and agricultural sectors 	<ul style="list-style-type: none"> • Work with renewable sector and Queensland Government regarding potential establishment of a 'Renewable Energy Zone' in the region. • Proactively attract new industry to the region • Support completion of Industrial Land Strategy • Completion of supply chain mapping 	<ul style="list-style-type: none"> • Undertake population attraction activities • Update the Housing Demand Strategy • Support skills development initiatives such as establishment of a Country University facility • Support education and training providers regarding retention pathways • Proactively facilitate delivery of new residential land to meet demand
Measurement	<ul style="list-style-type: none"> • Volume and diversity of agricultural produce • Value of gross value add generated from the Agricultural and Manufacturing sectors 	<ul style="list-style-type: none"> • Number of visitors • Number of visitors undertaking outdoor activities • Attraction of high-value visitors 	<ul style="list-style-type: none"> • Demand and supply of industrial land • Number of persons employed in renewable energy sector 	<ul style="list-style-type: none"> • Population growth (and sub-components) • Number of persons employed in population driven sectors.

Notes: 1. Economic impacts have been estimated for operations of each sector (i.e., excluding construction) based on average business size (ABS Counts of Australian Businesses, Including Entries and Exits, 2019) and include the Initial stimulus (direct) impacts, which represent the economic activity of the industry directly experiencing the stimulus and Flow-on impacts, which are disaggregated to: • Production induced effects (type I flow-on), which comprise the effects from: (1) Direct expenditure on goods and services by the industry experiencing the stimulus (direct suppliers to the industry), known as the first round or direct requirements effects. (2) The second and subsequent round effects of increased purchases by suppliers in response to increased sales, known as the industry support effects.

• Household consumption effects (type II flow-on), which represent the consumption induced activity from additional household expenditure on goods and services resulting from additional wages and salaries being paid within the economic system.
2. Economic impact for Agriculture and Processing is based on estimates for agriculture and fruit and vegetable manufacturing and presented as a range.
3. Economic Impact for Tourism and Eco-tourism is based on estimates for accommodation and food services and presented as a range.

The Southern Downs Region has the potential to further diversify and grow its economy. The region is well located, being two hours from Brisbane and at the junction of two highways, with ample land that is appropriately zoned, access to resources and safe and liveable communities.



Southern Downs
REGIONAL COUNCIL

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Dave Burges

CEO

P: 0427 461 165

E: dave.burges@sdrc.qld.gov.au

Southern Downs

A great place to live, work, play and stay.

CONTACT US



Warwick Office

64 Fitzroy Street Warwick QLD 4370

Stanthorpe Office

61 Marsh Street Stanthorpe QLD 4380



sdrc.qld.gov.au



mail@sdrc.qld.gov.au



1300 MY SDRC

Southern Downs online

