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Regional Jobs and Investment Packages

South Coast Region of New South Wales
Local Investment Plan

May 2017

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NSW SOUTH COAST RJIP BOUNDARY

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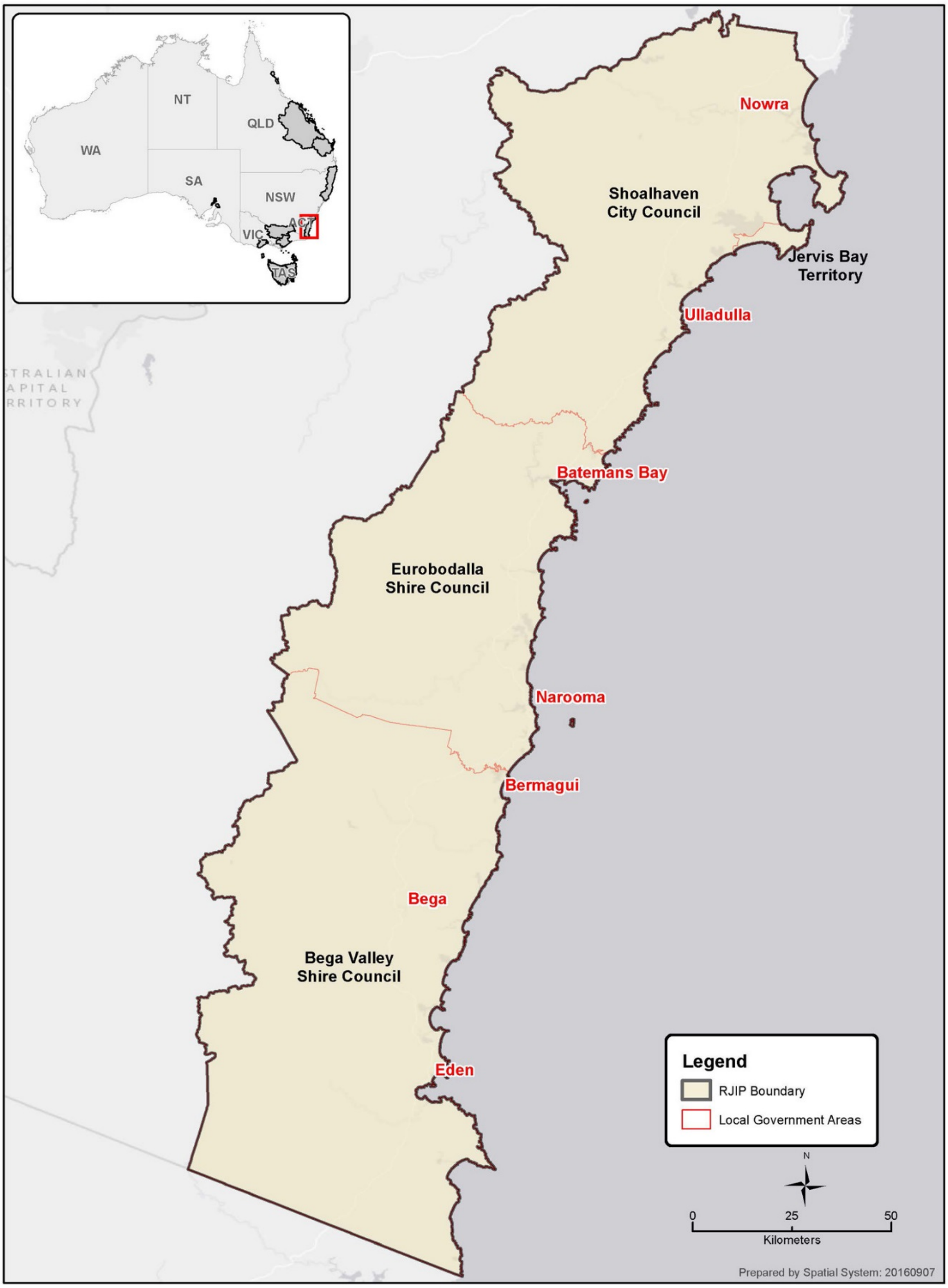

1 Introduction

Following the appointment of the South Coast Regional Jobs Investment Package (SCRJIP) Committee and appropriate support personnel, the Committee undertook desktop analysis of existing plans and documents pertaining to the economic development and jobs potential of the South Coast region. Further, Committee members undertook consultations with community members and business leaders to determine local priorities and opportunities across the three LGAs that were identified as the South Coast region for the purposes of this funding package.

The SCRJIP Committee recognises the importance of projects and/or initiatives that offer a structural adjustment to the south coast regional economy. The Committee encourages all stakeholders, including potential eligible funding applicants, government, business, the regional community, NGOs and local Councils, to submit and/or support those projects that fit with this plan and are sustainable, meet future workforce needs, utilise competitive advantages and secure the economic future of the region.

1.1 Reference sources

The documents listed below were consulted in the preparation of this document or were utilised in the process of gaining an understanding of issues relevant to the development of the SCRJIP.

1.1.1 Australian Government

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- ABS - Census of Population and Housing: Community Profiles 2011/2014
- ABS - Experimental Est. of Aboriginal & Torres Strait Islander Australians 2011
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- Australia to 2050: Future Challenge - the 2010 Intergenerational Report 2010
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- RDA Fact Sheet 1: Strategies for Regional Growth 2009
- Tourism Industry Facts and Figures at a Glance May 2010
- Closing the Gap - Prime Minister's Report 2010 2010
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- Labour Market Overview Far South Coast Dept of Employment 2014

1.1.2 NSW Government

- State Plan: Supporting Business and Jobs Illawarra and South Coast Region 2010
- Regional Business Growth Plan March 2010 / Industry & Investment NSW
- South Coast Regional Strategy / NSW Dept. Of Planning 2007
- Illawarra and South Coast Emp. Lands Strategy /NSW Dept. Of Planning 2008
- NSW State Plan 2009 2009

- NSW State Plan 2009 - Illawarra Local Action Plan 2009
- NSW State Plan 2009 - South East NSW Local Action Plan 2009
- NSW Regional Innovation Strategy: Resilient Business, Sustainable Jobs 2009
- Tourism New South Wales (TNSW) 2010
- NSW Maritime - Port of Eden 2016
- NSW Budget 2015-2016
- NSW Planning and Environment 2017
- South Coast NSW Destination Management Plan 2012
- NSW Government Local land Services 2016
- NSW Dept. of Industry 2017

1.1.3 Local Government

- Shoalhaven City Council (SCC) Management Plan 2009 - 2012
- Community Strategic Plan 2020 2009
- SCC – Tourism Masterplan – Destination Management Strategy 2012-2017
- Shoalhaven the Enterprising Alternative 2013
- Shoalhaven Statistic and Studies 2015

1.1.4 Eurobodalla Shire Council

- Management Plan 2010 – 2014 2010
- Airport Master Planning Report and Land use Report 2006
- Eurobodalla Destination Management Plan 2011-2020 2011
- Eurobodalla Shire Council Tourism Statistics 2016

1.1.5 Bega Valley Shire

- Bega Valley Shire 2025 - 20 Year Plan 2006
- Sapphire Coast Draft Destination Management Plan and supporting strategies: National Landscapes–Australia's Coastal Wilderness Exp. Development Strategy
- Sapphire Coast Heritage Tourism Strategy 2012
- Bega Valley Shire – forecast id 2017
- Bega Valley Tourism 2017

1.1.6 Other

- RDA - Far West, Regional Plan 2010 – 2020 2010
- OECD - How Regions Grow 2009
- SEATS - SEATS Election Policy Documents 2010
- SCRTO - South Coast Destination Management Plan 2013
- Royal Australian Navy - HMAS Creswell - 2013
- Royal Australian Navy - HMAS Albatross 2013
- IRIS Research 2013
- Destination NSW 2014
- RDA Far South Coast Strategic Regional Plan 2012-2017
- RDA Far South Coast NSW South Coast Skills Audit 2016

- RDA Far South Coast Equine Industry Scoping Report 2012
- RDA Far South Coast - Report into the economic and jobs growth potential of the agriculture, viticulture and aquaculture industries on the NSW Far South Coast 2016

2 The Region

2.1 Population

172,650 persons (2016 est. resident population)

Growth Rate: 3.74% (2011 – 2016) 0.51% average annual growth

2.2 Key Industries

- Retail
- Health Care and Social Assistance
- Construction
- Manufacturing
- Defence
- Tourism and Agriculture

2.3 Number of Businesses by Industry – (top 10 shown)

Construction	2484
Agriculture, forestry and fishing	1250
Rental, hiring and real estate services	1165
Retail trade	1101
Professional, scientific and technical services	989
Tourism	863
Financial and insurance services	647
Health care and social assistance	638
Transport, postal and warehousing	631
Other services	613
Total Businesses FSC (2014)	12,123

2.4 Council Areas

City of Shoalhaven, Eurobodalla Shire and Bega Valley Shire

2.5 Location & Environment

The Far South Coast (FSC) of NSW is a region covering 14,230sqkm of coastal land from Berry in the north to the NSW/ Victoria border in the south.

It is made up of three local government areas – Shoalhaven City, Eurobodalla Shire and Bega Valley Shire.

The FSC is strategically located between the nation's main capital cities, approximately 2-5 hours from Sydney, 6-10 hours from Melbourne and just 2 hours from Canberra.

The FSC is renowned for its natural beauty with nearly 400 km of coastline; numerous marine parks, thirty one national park areas and extensive areas of state parks.

The region generally has mild, pleasant weather. The summers are warm with an average maximum of 27°C while the winters generally have a minimum range from 1°C to 12°C. (Bureau of Meteorology).

2.6 People & Community

The estimated resident population of the FSC as at 30 June 2016 was 172,500 persons.

More than half of these were in the Shoalhaven (99,800).

The population has increased by 3.74% over the last five years and currently has a density of around

14.9 people per square kilometre (average of Shoalhaven and South Coast).

At the time of the last census, 3.7% of the population identified itself as being of Indigenous heritage, compared to a national average of 2.3%. One eighth of the local population (12.5%) was born overseas, with North-West Europe the main point of origin at 8.0%. Common birth places include England, New Zealand, Germany and the Netherlands. The FSC's share of persons born overseas is notably lower than the national average of 22.2%.

Nearly three quarters of local households are made up of families (71.5%), with an additional 2.5% in groups.

Persons living alone account for 26.0% of households.

Just over a third of local families were couples with children (35.4%), with most of these including children under 15 years and/or dependent children (29.4%).

Nearly half were couples without children (47.8%), while 15.8% were single parent families.

Persons aged 65 years or older accounted for 20.6% of the resident population.

2.7 Population Projections

According to the NSW Department of Planning and Environment, the population of the FSC is expected to reach 177,650 by 2021 and 185,250 by 2031.

Shoalhaven LGA will account for both the greatest numerical and the greatest proportional increase in population to the year 2031, with 108,150, an increase of 12.42% based on 2011 figures.

Bega Valley will experience a 9.96% increase to 36,450 and Eurobodalla will experience an increase of 9.57% to 40,650.

In line with what is occurring across the country, the average age of the population of the FSC is increasing. Retirees are making a ‘sea change’ to the FSC and youth are moving away, resulting in an aging population. Singles and childless couples will dominate the region in the future.

2.8 Workforce

At the time of the 2011 census, the FSC labour force consisted of 64,059 persons. Of those, 92.2% were employed, with 49.9% in full-time work and 34.9% in part-time work. 7% of the labour force was classified as unemployed (ABS). The Shoalhaven area reported an unemployment estimate of just under 8% in 2017 with Eurobodalla at over 7% and Bega Valley at 4.7%.

The largest employer in the FSC is the Health Care & Social Assistance sector, increasing employment from 6,451 people in 2006 to 8,159 people in 2011 (13.9%).The Retail Trade accounted for 7,677 people in 2011 (13.1%), decreasing from 8,178 in 2006. Tourism employs 5,902 people (10.1%), Construction 5,528 people (9.4%) and Public Administration & Safety 4,464 people (8.4%).

More recently, the average unemployment rate for the FSC was 7%, compared to the national average of 5.8% (My Region).

2.9 Income

In the year ending 30 June 2011, the FSC’s average wage was $37,220 per year. NSW’s average wage was $53,917 and the national average was $51,923 per year.

The highest percentage of total family income (17.59%) for the FSC in 2011 was between $1,000 and $1,499 per week (My Region).

2.10 Economy, Industry & Business

At 30 June 2014 there were 12,095 registered businesses in the FSC.

The distribution of the workforce across the region’s industries is an effective way of gauging their relative strength and importance in the FSC economy.

The FSC places its importance on Health Care & Social Assistance as this industry is the largest employer in the region (13.9%). The Retail Trade is the second largest industry, employing 13.1% of the workforce. This is due to the large tourism numbers in the FSC. Tourism employs 10.1% of workers, Construction 9.4% and Public Administration & Services employ 8.4% of the workforce. These industry employment percentages for the FSC are all higher that the Regional NSW percentages.

Education & Training and Manufacturing are marginally smaller in the FSC, employing 7.9% and 7.6% of workers, respectively. While these are two of the larger employing industries in the region, their share is below the Australian benchmark of 8.6% and 8.3%, respectively.

There are a number of industrial and commercial business parks throughout the region.

Industry	FSC	Regional NSW
Health Care & Social Assistance	13.9%	13.0%
Retail Trade	13.1%	11.4%
Tourism	10.1%	7.7%
Construction	9.4%	7.9%
Public Administration & Safety	8.4%	7.2%
Education & Training	7.9%	8.6%

Industry	FSC	Regional NSW
Manufacturing	7.6%	8.3%
Professional, Scientific & Tech. Services	4.4%	4.6%
Other Services	3.8%	3.9%
Transport, Postal & Warehousing	3.7%	4.2%
Agriculture, Forestry & Fishing	3.2%	5.8%
Administrative & Support Services	3.1%	2.8%
Wholesale Trade	2.2%	2.8%
Inadequately described or not stated	2.0%	2.1%
Rental, Hiring & Real Estate Services	1.7%	1.4%
Arts & Recreation Services	1.6%	2.1%
Financial & Insurance Services	1.6%	2.2%
Info. Media & Telecommunications	1.1%	1.0%
Electricity Gas Water & Waste Services	1.1%	1.5%
Mining	0.3%	2.5%

2.10.1 Manufacturing

Despite having a share of employment that is lower than the Australian average, manufacturing is one of the region's key income generating industries. Manufactured products range from dairy goods to papers, timber to surf clothing and yachts. Some notable FSC products include Bega Cheese, Manildra Ethanol, Nowra Chemicals, Bodalla Cheese, South Coast Milk, Argyle Prestige Meats and Shoalhaven Abalone.

2.10.2 Defence

The region's Public Administration & Safety industry is boosted by the defence sector in the Shoalhaven. The Shoalhaven is home to two Navy bases – HMAS Albatross and HMAS Creswell. The primary task of HMAS Albatross is to support the four Naval Air Squadrons, which provide air support to the fleet. The four squadrons and the aircraft they operate are:

- 723 Squadron with AS350 Squirrel and Bell 429 helicopters
- 816 Squadron with S-70B Seahawk helicopters and
- NUSQN 808 with MRH-90 helicopters.
- 725 Squadron with MH-60R helicopters

816 Squadron will receive a new Helicopter Flight Aircrew training System in 2018, representing an investment of $157M.

HMAS Creswell is located on the south-western shores of Jervis Bay in the Jervis Bay Territory. Creswell consists of the RAN College and four other departments. The School of Survivability and Ship's Safety teaches firefighting, damage control and nuclear, biological and chemical defence. Listed on the National Register as a significant heritage site, a quarter of HMAS Creswell's buildings are heritage listed (Navy, 2013).

2.10.3 Agriculture

The FSC was traditionally an agricultural region. The rich lands and vast waterways in the area are ideal for agricultural/aquaculture production. A number of FSC agricultural/aquaculture products are being successfully exported around the world, including Bega Dairy, Australia's Oyster Coast Oysters and Shoalhaven Abalone which are proving popular in Japanese markets. Other agricultural producers include South Coast Dairy, Tilba Dairy, Bodalla Dairy and other niche food producers. The FSC also produces timber, beef, flowers, seeds and wine for domestic and international markets. In total, local agricultural and aquaculture production was identified as contributing in excess of $156M in 2011, half of which was from livestock products such as beef and milk (RDS FSC 2016).

2.10.4 Education

The University of Wollongong has campuses located in all three LGAs. Students can complete studies in a range of courses from the Arts, Commerce, Aquaculture, Nursing, Education and Health & Behavioural Science and faculties as well as the Graduate School of Medicine. A new mental health facility, an initiative of Shoalhaven City Council and The University of Wollongong is currently under construction at the West Nowra campus.

TAFE NSW has campuses located in all three LGAs, offering courses in subjects such as Aged Care, Community Services, Health, Disabilities, Trades, Business, Agriculture, Hospitality, Tourism, Information Technology, Child Studies and Industry legislative compliance.

There are numerous primary and secondary schools throughout the FSC, both public and private.

There are a number of Registered Training Organisations including Community Colleges in all three LGAs.

Education and training employ 7.9% of the regions workforce.

2.10.5 Tourism

With over 400km of pristine coastline as well as vast national and state parks, the NSW south coast is the third most visited region in NSW, attracting 4.9 million visitors (excluding figures for Jervis Bay). This equates to 12.3% of total visits made within NSW making the FSC one of the state's most popular tourist destinations. This annual visitation is a balanced division between day-trippers and overnight visitors. Over 70,000 international visitors travel to the FSC region each year.

There are over 86 tourist accommodation establishments with five or more rooms in the FSC that offer approximately 2,261 guest rooms (Destination NSW 2014), however, there are many more establishments with 4 or less rooms.

The NSW Government on July 6, 2016 announced it would invest $43 million over four years in a major overhaul in the way regional and rural areas attract visitors, including the creation of six new Destination Networks throughout NSW.

The Destination Networks will replace the current Regional Tourism Organisation structure.

Destination NSW will be working with each of the Destination Networks to market each region, showcasing the diverse range of destinations and experiences Regional NSW has to offer to potential visitors across NSW, Australia and to the world.

To drive the growth of the visitor economy in Regional NSW, six new and professionalised regional tourism entities will be established. The new DNs covering the Far South Coast region will include:

- Destination Southern NSW (including the Snowy Mountains and the Far South Coast)
- Destination Sydney Surrounds South (including the Southern Highlands, Wollongong and Shoalhaven)

2.10.6 Property

The FSC offers a wide range of housing options with both residential and holiday homes available at various price points. In the Eurobodalla, the median dwelling sale price was $360,500 in 2013. The Shoalhaven and Bega were slightly lower at $350,500.

2.10.7 Infrastructure

The FSC region has a range of infrastructure assets that support economic development and employment, including the Port of Eden, which is the main port for the South Coast supporting export activities, commercial fishing and more recently cruise ships. Funding was finalised in 2016 following concept design and feasibility studies for the extension of the breakwater wharf. Tenders have now been called for the construction of this facility, collectively named the Safe Harbour Project, incorporating the break wall extension and wave attenuator. This development in the Snug Cove precinct will allow up to 40 cruise liners a year of up to 300m length to berth and will bring an estimated $44M into the local economy. These improvements to the port will also facilitate increasing capacity for smaller recreational vessels and the local fishing fleet.

The upgraded Moruya Airport and Merimbula Airport provide access to Sydney, Melbourne and Canberra (Dept. of Planning) and Shoalhaven has the South Coast Correctional Facility at South Nowra. The centre commenced operations in 2010 and was built at a cost of $130M. The Centre provides 250 jobs and injects $20M per annum into the local economy (SCC, 2013). The centre will be expanded to include an extra 360 beds, due for completion in 2019.

The FSC is serviced by electricity, water, sewerage and LP gas. Natural gas is only available in the Nowra/ Bomaderry area.

A number of major road arteries connect the region to nearby capitals. The Princes Highway, linking Sydney and Melbourne, passes through the FSC and is the main transport corridor for the region. Canberra can be reached by main roads from Nowra, Batemans Bay and Bega with the southern sections of the region relying heavily on the Kings Highway. There is a train line from Bomaderry (Nowra) linking the Shoalhaven at the northern most point of the region to Sydney. Additionally a number of coach services operate in the FSC.

There are a number of public and private hospitals located in the region, including those at Berry, Nowra, Milton, Batemans Bay, Moruya, Bega and Pambula. There are also numerous medical centres, health clinics and GP services throughout the region including the recently completed Cancer Care Centres at Nowra and Moruya.

Infrastructure across the region is in need of a general upgrading and expansion to meet the needs of the forecast population increases and our aging demographic. Specific infrastructure projects will be required to allow for and encourage regional growth.

3 Investment sectors and strategic priorities

3.1 Investment Sector: Tourism and tourism support

3.1.1 Evidence

The South Coast is the third most visited tourism region in NSW, ranking behind Sydney and the NSW North Coast (combined North Coast and Northern Rivers Regions). In 2012 the South Coast attracted 9.0134 million visitors with these visitors spending an estimated $1.902 billion dollars within the Region (South Coast Regional Tourism Organisation (SCRTO) Destination Management Plan 2013-2020). Within the context of the South Coast region, the LGAs are positioned within the SCRTO Destination Management Plan as follows:

- Shoalhaven City - Shoalhaven City will remain the most popular destination in NSW outside of Sydney. Within the South Coast Region, the Shoalhaven will be positioned within the context of the 'Heart, soul and essence of the South Coast.'
- Eurobodalla Shire - Nature Coast / Land of Many Waters / Bring Out Your Better Nature – a slower more relaxed pace of life, unspoilt beaches and forests, uncrowded natural world with nostalgic connections.
- Sapphire Coast (Bega Valley) - Australia's Coastal Wilderness - a range of world class nature-based and cultural experiences in unspoilt natural environments and unique and welcoming communities. An accessible yet remote coastal destination where you can escape to the lakes and forests, or stand on the beach with no one else's footprints but your own!

The key assets that underpin the tourism industry and the broader visitor economy of the South Coast region include:

- The diversity of landscapes and the beauty of the physical environment – spectacular coastal scenery, National Parks and forests, rich agricultural areas and the forested slopes and sheer cliffs of the backing escarpment.
- The pristine nature of many of the beaches, waterways and forests within the Region. The significance of these assets is recognised in the southern part of the Region being included in the Australia's Coastal Wilderness iconic landscape experience. The pristine waterways also produce quality seafood – with fresh seafood being part of the South Coast experience.
- The quality of the natural environment preserved within a network of National Parks, Wilderness Areas, State Forests, State Conservation Areas, Crown Reserves and Marine Parks. In addition to being part of the attraction base of the area, these Parks and reserves contribute strongly to the scenic and lifestyle attributes of the Region.
- Plentiful marine life and wildlife – including whales, dolphins, seal colonies, turtles, kangaroos, wombats and the migratory sea birds. The presence of the kangaroos in some of the coastal villages and along the beaches is a popular attraction, particularly for families, new immigrants and international visitors.
- The three high profile Bays – Jervis Bay, Batemans Bay and Twofold Bay.
- Warm temperate climate – year round – no wet season and low humidity; cooler than the adjoining tableland areas in summer and warmer in winter; warmer than Victoria.
- The uncrowded, relatively undeveloped and un-commercialised nature of the area. As a result of the settlement pattern of the area and the large tracts of native forest, the capacity of the Region to 'absorb' volume without being perceived as overcrowded, is significant.
- Lifestyle – traditional, relaxed, safe – the environment of the coastal villages provide the opportunities to sample the simple pleasures, get back to basics, allows children the freedom to explore and discover, and visitors to re-connect with nature and socially with family and friends.
- Diversity of coastal and hinterland towns and villages – including the historic towns and villages which offer quality boutique shopping, galleries and dining experiences.
- Rich Indigenous and post contact history with a diversity of 'stories' and Indigenous heritage and a range of Indigenous tourism experiences.
- The availability of a diverse range of accommodation across all price ranges.
- The availability of a range of quality venues, sporting facilities and supporting infrastructure as the basis for growing the business and sport events, and weddings and functions markets.
- Recognised food and wine region notable for dairy (particularly cheese and milk), oysters, seafood, organic niche producers, farmers markets, food processing and viticulture.

- Potential to leverage against other government funded projects such as the extension of the wharf at Snug Cove, Eden to allow for large cruise ship visitation.
- Key infrastructure assets include Merimbula Airport, Moruya Airport, Canberra International Airport, Port of Eden, South Coast wineries and diverse and wide ranging accommodation facilities and the upgraded Princes Highway.

3.1.2 Strategic priorities

- Extend the range of visitor experiences available including, but not limited to, cultural tourism, emerging markets and inclusive tourism
- Increase tourism spend by attracting high yield and overseas market segments
- Improve the quality, range and availability of accommodation and improve transport
- Grow the regions brand recognition nationally and internationally (e.g. 'Australia's Oyster Coast')
- Increase the regions attractiveness such as through iconic gateway projects
- Facilitate tourism activity and increase visitor nights through improved and additional infrastructure and/or innovation/technology (e.g. marinas, slipways, fishing and boating infrastructure, accommodation, airports, transport hubs, coastal walks, equine tourism, sports tourism.

Evidence (for identifying these strategic priorities)

The SCRTO Destination Management Plan, the Regional Development Australia – Far South Coast (RDA FSC) Strategic Regional Plan, DNSW and each LGA Council within the Far South Coast region identify tourism as a major industry sector for the region. This sector offers employment opportunities from entry level positions to senior management roles and encourages innovation and entrepreneurship. Within a diverse and widely spread geographic area, tourism offers a range of opportunities particularly to those within the lower socio economic demographic and within an area suffering from high unemployment.

3.2 Investment Sector: Manufacturing and transport logistics

3.2.1 Evidence

An established manufacturing sector exists on the South Coast and is home to one of Australia's largest and most iconic manufacturers, Bega Cheese. Other large manufacturers in the region include Manildra at Bomaderry and other Defence related industries in Nowra that service HMAS Albatross, and the naval wharf at Eden and Allied Natural Wood Exports at Eden.

The 2011 Census advises that manufacturing employs 4,167 persons on the South Coast.

Of all industry sectors, manufacturing has the longest supply chain impacts in consuming local services and creating other indirect employment opportunities. By funding projects that stimulate the manufacturing sector, more indirect jobs are created in the community (REMPLAN).

Investment in the Manufacturing Sector supports the NSW Government's Economic Development Strategy for NSW, "Support the overall development and competitiveness of the manufacturing sector by promoting export growth, design-led innovation, and key subsectors with global competitive potential like food processing.''

Support for logistics businesses on the south coast is crucial. Local industry relies on access to the Princes Highway, as it is the main north-south arterial road. Rail access to the SCRJIP defined South Coast region is non-existent as the South Coast rail line terminates at Bomaderry. Major areas of the South Coast cannot be serviced by B-Doubles, rail or sea transport. There is an identified need for co-operative freight arrangements to benefit producers to maximise the potential of current and emerging infrastructure, i.e. Merimbula, Moruya and Canberra airports and the Port of Eden (Eurobodalla Shire Economic Growth and Development Strategy). Freight transport improvements, such as freight distribution transport hubs, tolling facilities and strategically located processing facilities would all significantly reduce the business costs within the region allowing capital to be freed up for infrastructure expenditure and training and skills improvement.

3.2.2 Strategic priorities

- Increased infrastructure and/or innovation and capital expenditure to upgrade equipment and facilities, including automation.
- Improve training opportunities through greater resourcing of TAFE, universities and other educational methods and/or providers. Such improvements to support and upskill manufacturing workers and management capability and improve skills to maximise jobs growth in support of identified new and emerging markets and export opportunities.
- Improve infrastructure and/or delivery of utilities such as electricity, gas, employment lands, access roads, telecommunications, including increased Black Spot (Mobile Phone) program funding.
- Access to new technology, such as, but not limited to, 3D printing, to facilitate R&D and allow for increased investment opportunities for new and emerging industries.
- Improve delivery services thereby supporting and promoting diversification and/or growth of business and industry.

Evidence

REMPLAN Model.

Advance Manufacturing Growth Centre Sector Competitiveness Plan 2017 AMGC Plan.

South Coast Skills Audit 2016 report.

Eurobodalla Shire Economic Growth and Development Strategy

Further: See References

3.3 Investment Sector: Primary industry

Including aquaculture, agriculture and viticulture

3.3.1 Evidence

1. Current agriculture, viticulture and aquaculture industries:

Agricultural land comprises approximately 14% of the total combined land area with grazing the predominant land use. The major land use for the total combined land area is conservation and tree cover comprising about 80% of total land. The mountainous and heavily vegetated areas of land that occur along the north-south axis of the region limit the agricultural area to its current extent. However, the region includes a number of coastal lakes, lagoons and estuaries that support a range of aquaculture industries (there are 103 oyster farmers contributing more than 30% of Sydney Rock Oyster production in NSW).

Land use	Hectares	%
Grazing	201,360	14%
Cropping & horticulture	910	0.06%
Intensive Animal Production	144	0.01%

Land use	Hectares	%
Conservation and tree cover	1,128,765	79%
River and wetlands	35,354	2%
Urban	46,694	3%
Other	13,029	1%
Total	1,426,256	100%

Table: Value of production and employment

Enterprise	2006	2011	% Change	% of Australian
Milk	$68,879,581	$93,398,764	36%	23.75%
Cattle and calves	$25,886,722	$45,703,188	77%	5.84%
Crops for hay	$66,019	$3,947,083	5879%	3.72%
Cultivated turf	$2,077,261	$3,714,493	79%	15.54%
Cut flowers	$1,804,487	$2,453,179	36%	8.43%
Nurseries	$6,480,794	$2,442,509	-62%	3.33%
Wool	$706,125	$1,152,874	63%	0.43%
Goats	N.A.	$1,043,174		N.A.
Sheep and lambs	$416,566	$825,875	98%	0.29%
Cereal crops	$129,937	$677,329	421%	0.07%
Stone Fruit	$269,525	$417,400	55%	0.79%
Berry Fruit	$422,380	$368,729	-13%	1.05%
Vegetables	$339,661	$261,203	-23%	0.08%
Nuts	$50,954	$134,615	164%	0.48%
Pigs	$271,243	$115,664	-57%	0.13%
Other broadacre crops	N.A.	$88,188		0.02%
Poultry	$1,915	$47,232	2366%	0.02%
Eggs	$38,896	$44,291	14%	0.08%
Pome Fruit	$10,017	$33,381	233%	0.04%
Plantation Fruit	$76,437	$32,105	-58%	0.08%
Total	$107,928,520	$156,901,276	43%	
Viticulture	$46,795	$53,694	15%	0.08%
Oysters (Sydney Rock and Pacific varieties only)	NSW aquaculture (2013/14)	$13,241,073	-	24.8% (NSW)
Other (NSW aquaculture)[1]	NSW aquaculture (2013/14)	$589,614	-	1.1% (NSW)

1 Includes Australian Paratya, Blue Mussel, Eastern Yabby, Flood Plain Mussel, Native Oyster, Pearl Oyster and Tube Worm – separate values not available for confidentiality reasons.

The table above shows that in 2011 (the latest available statistics) the gross value of agricultural production was approximately $157 million per year (farm-gate value).

Almost 90% of the value of production is contributed by the milk and cattle production sectors while other significant production industries by value are oysters, cultivated turf, cut flowers and nurseries. There is a range of emerging industries (e.g. aquaculture) and many niche production systems that include direct sales to customers or via farmers' markets, some of which are for certified organic produce.

However, the economic activity generated from the inputs, transport, processing, marketing and services means that the Gross Regional Product (GRP) of the sector is much higher. For example, the GRP of the Agriculture, Fishing and Forestry industries in the broader South East and Tablelands region was $720 million in 2013.

In 2011 there were 1,884 employees in the Agriculture, Fishing and Forestry production sectors in the region, representing 3.2% of total employment on the Far South Coast. These figures do not take into account the "multiplier" effect in related sectors (services, tourism, transport, processing and marketing) generated from the agriculture, viticulture and aquaculture production base.

2. Regional advantages for those industries

The regional advantages for the agriculture, viticulture and aquaculture industries include a combination of factors extending from favourable production climate and the associated "clean, green" image through to the region's proximity to major domestic markets (Sydney, Canberra and Melbourne) and access to export facilities through Sydney and Canberra Airports. The region is also a major tourist destination and this provides an additional outlet for value adding of local produce.

From a combination of stakeholder consultation and desktop analysis, a summary of the region's strengths, weaknesses, opportunities and threats (SWOT) has been developed to guide future strategies to gain the maximum economic benefit from identified regional advantages of the agriculture, viticulture and aquaculture industries on the Far South Coast. See table below:

Strengths	Weaknesses
▪ Clean, green, pristine production environment ▪ Low cost production (especially dairy and beef cattle, but not viticulture ▪ Irrigation water availability ▪ Existing and potential Reclaimed Water ▪ Management Scheme (REMS) water availability ▪ Presence of processors (milk, abattoirs) ▪ Good livestock logistical services (saleyards, weighbridges, truck washes) ▪ Presence of farmers markets ▪ Proximity to Sydney, Canberra and Melbourne Availability of airports and sea ports ▪ Tourism including cultural tourism ▪ Availability of business services (inputs and advisory) ▪ Education institutions (University of Wollongong, TAFE, schools) ▪ Climate	▪ Rural residential encroachment resulting in increased agricultural land prices and land use conflict ▪ Increase in effluent disposal not matched by treatment infrastructure ▪ Seasonality – of production and number of tourists ▪ Many small, lifestyle producers not connected to value chains thus reducing market scale ▪ Labour availability and skills ▪ Reduction in government services, including skills training Lack of awareness of remaining government services Transport limitations – road and rail ▪ Reduction in licensed irrigation water availability due to increase in number of owner/occupiers entitled to take water from a river, estuary or lake for domestic consumption and stock watering without the need for an access license

Strengths	Weaknesses
▪	▪ Demographics – older population, disengaged youth Red tape associated with regulations ▪ Lack of diversity of energy supplies (electricity) ▪ Poor information technology services (internet speeds, mobile phone black spots)

Opportunities	Threats
▪ Food movement, including demand for value added product and cultural food experiences ▪ Increase in tourism ▪ Infrastructure upgrades (airports including exports from Canberra airport, sea ports, roads, NBN) ▪ Aquaculture expansion ▪ Diversified energy sources – natural gas, renewables ▪ Cross promotion between industries ▪ Shared productivity/innovation between industries ▪ Location advantages	▪ Rural residential expansion ▪ Right to farm being undermined ▪ Biosecurity ▪ Degradation of natural resources (terrestrial and aquatic) ▪ Climate ▪ Market competition (domestic and export) ▪ Cyclical nature of world markets

3. Short, medium and long term potential for the industries with a focus on jobs growth

The potential for the industries are a function of the opportunities described in the SWOT table above, however the opportunities will not be realised unless the identified weaknesses and threats are addressed (see the next section (4) that outlines the strategies to gain the maximum economic benefits).

The potential for the region is underscored by a number of national and international trends, policies and strategies that are more fully described in the report. These include research completed by the Rural Industries Research and Development Corporation (RIRDC) and CSIRO in August 2015 that identified five key “megatrends” and opportunities for Australian agriculture as the world grows hungrier, wealthier and with fussier consumers.

The five identified trends are:

1. A hungrier world
2. A wealthier world
3. Fussier customers
4. Transformative technologies
5. Bumpier ride

Other drivers include the priority areas within the Commonwealth's Agricultural Competitiveness White Paper; various NSW government regional strategies (South East and Tablelands Draft Regional Plan, South East Australia Transport Strategy – SEATS); NSW Government support programs such as the NSW Export Support Services; expenditure on upgrades to infrastructure(Princes Highway Draft Corridor Strategy, the Port of Eden upgrade, upgrades to both Merimbula and Moruya airports and direct freight export from Canberra Airport) as well as connecting with the international inbound tourism market.

Local governments in the region now adopt rural land strategies and facilitate the promotion of regional produce and these contribute to expanding the economic base of the agriculture, viticulture and aquaculture industries.

The region includes major established dairy processors such as Bega Cheese and Bodalla Dairy targeting the domestic and export markets. The value of oyster production represents approximately 30% of the total NSW value. While the value of viticultural production is not high, there are many wineries that combine production with cellar door sales and also cater for a range of functions.

Innovative technologies are being pursued by companies such as Blue BioTech Shoalhaven to advance aquatic biotechnology, including growth of seaweed biomass and extraction of functional compounds for human health applications.

Future growth potential will largely be the responsibility of private enterprise in partnership with State and Federal Governments to allow the region to take full advantage of the changing market outlook described above.

3.3.2 Strategic priorities

- Increased infrastructure and/or innovation and capital expenditure to upgrade equipment and facilities, including automation.
- Improve training opportunities through greater resourcing of TAFE, universities and other educational methods and/or providers. Such improvements to support and upskill workers and management capability and improve skills to maximise jobs growth in support of identified new and emerging markets and export opportunities.
- Improve delivery services thereby supporting and promoting diversification and/or growth of business and industry.
- Access to new technology, and/or facilitate R&D to allow for increased investment opportunities for new and emerging industries.

Evidence

South East Food: Growing the Regional Food Economy in South East NSW

Further: See References.

3.4 Investment Sector: Health and human services

3.4.1 Evidence

Residents have access to a range of public and private hospitals and a range of public and private health care professionals and services. However, the region suffers from a shortage of health care workers. Attracting and retaining these skilled workers is difficult due to the limitations suffered by the greater community, such as limited transportation, infrastructure, education and sporting facilities, etc. which impact on the families of these workers (South Coast Skills Audit, 2016).

The migration of retirees to the region has given rise to an exponential increase in the range of aged care facilities. These facilities are private, public and community based. Numerous aged care facilities are currently under construction and provide a major growth industry for the region however aged care workers are in short supply and are traditionally low paid.

Disadvantaged groups suffer long waiting lists for public health while patients requiring specialist care have to travel long distances. The regional demographic includes higher than State average disadvantage in the following areas: Aboriginal; long term unemployed; mental health and other disabilities. These shortcomings in the system will only be exacerbated by any increase in the population.

While these distinct disadvantages of regional health are endemic, improved transport and road infrastructure and access to e-health through improved communications technology (high speed broadband) would significantly reduce waiting times and allow more convenient access to health services thus improving the quality of life.

In the 2014 Labour Market Overview of the Far South Coast, presented by Ivan Neville from the Department of Employment, Mr Neville noted jobs growth on the Far South Coast is strongest in Health. Further, with the forecast population increases and an ageing demographic, it is critical that investment is made in health and human services infrastructure and innovation to meet expected demand.

Shoalhaven City Council has designated a medical precinct and identified appropriate lands for future expansion. Eurobodalla will require further aged care facilities that include an attached hospital and Bega Valley Shire will require increased aged care amenities and facilities. The region in general will require greater investment, skills and training across the Health and Human Services sector to meet the forecast growing demand.

3.4.2 Strategic priorities

- Increased infrastructure and/or innovation and capital expenditure to upgrade equipment and facilities, including automation.
- Improve training opportunities through greater resourcing of TAFE, universities and other educational methods and/or providers. Such improvements to support and upskill workers and management capability and improve skills to maximise jobs growth in support of identified new and emerging markets and export opportunities.
- Improve delivery services thereby supporting and promoting diversification and/or growth of business and industry.
- Access to new technology, and/or facilitate R&D to allow for increased investment opportunities for new and emerging industries.

Evidence

See References.

3.5 Investment Sector: Specialised education services

3.5.1 Evidence

Youth (aged 15 to 24) in regional areas experience higher than state average unemployment rates and tend to be employed in lower skilled service industries such as retail, hospitality and trades. Unemployment, and in particular youth unemployment, has been a significant economic and social issue facing the South Coast region for the past two decades. Efforts across the region to address unemployment have resulted in limited systemic change. Future job growth is predicted to be in a diverse range of industries and such labour market changes will heighten the need for access and opportunities to further education and training, particularly for young people or those needing to retrain to move into new industries or occupations. For example, "…More than half of Australian workers will need to be able to use, configure or build digital systems in the next 2 – 3 years". The New Work Order FYA 2016.

The Reserve Bank of Australia has raised concerns regarding fewer working taxpayers relative to older people as the baby boomers retire and young people do not replace them. This is particularly relevant to the demographic on the NSW South Coast where the average age is higher than state or national averages as is the exit of younger people seeking work and education and higher numbers of young people remaining in the area but not working or studying.

Graduates are finding it harder to gain employment and employers are reporting mismatches in the skills young people are learning and that industry requires. In the RDA Far South Coast Skills Audit 2016, "lack of relevant training" was identified as one of the top three factors preventing employers attracting employees with the right skills.

Economic changes are transforming work through automation, globalisation and more flexible work. Currently around 70% of young Australians are getting their first jobs in roles that will either look very different or be completely lost in the next 10 to 15 years due to automation. Nearly 60% of Australian students (70% in VET) are currently studying or training for occupations where at least two thirds of jobs will be automated. Over 50% of jobs will require digital literacy skills not currently being learned in schools.

The future of work is changing. While there are more than 1,000 different job classifications in Australia many of these jobs involve similar tasks and skills, and can be grouped into 7 'cluster of work'. These clusters comprise a variety of occupations. To enter, succeed and move within a job cluster requires relevant technical and enterprise skills comprising a combination of formal training, on the job and experiential learning. "Enterprise Skills" are transferable skills that allow people to navigate complex careers across a range of industries and professions. They include:

- communication
- project management
- financial literacy
- digital literacy
- teamwork, and
- the ability to critically assess and analyse information, be creative and innovate and they are not role or industry specific.

The demand for enterprise skills is on the rise. Jobs of the future, or those jobs least likely to be automated, demand enterprise skills 70% more frequently than jobs of the past. In a 2015 study of entry level job advertisements, employers were 20% more likely to specify enterprise skills than technical skills (technical skills include formal qualifications, licences and skills specific to a particular task, role or industry).

In industries currently providing the highest number of early career jobs AND in those industries predicted to grow on the South Coast either organically (e.g. health and human services) or through targeted structural reforms (e.g. tourism, manufacturing, transport & logistics, primary industries, aquaculture, creative industries, education services and infrastructure) enterprise skills represent more than half the skills requested by employers.

Universities and Registered Training Organisations are significant employers in their own right as well as major contributors to skills development on the South Coast. They continue to reform and innovate their content and approach to delivery of education and training, including collaborations to provide entrepreneurship education in facilities run by entrepreneurs, to adapt to the changing nature of work. There is scope to increase the range, type and speed to market of innovative education and training that places 'enterprise skills' at the heart of learning. Such solutions may, or may not, come from within the existing higher education and vocational structures.

3.5.2 Strategic priorities

- A regional focus on appropriate education and skills development particularly of young people linked to work and job growth.
- Engage key government agencies, non-government organisations (NGOs), industry partners and the private sector to enable and connect people with the right skills, experience and qualifications needed to secure jobs within identified industries across the region.
- Strong, socially supportive communities and increased opportunities for job seekers to belong, contribute and thrive.
- Prepare organisations for the future with needs and skills identified and supported by a learning workplace culture.
- Increase the capacity of the learning and training sector and link learning to workplace need, including provision of flexible learning choice. This includes the infrastructure capacity to deliver and learn in innovative and/or digital platforms and simulated environments.

Evidence

- Bega Valley Economic Development Strategy

"If our residents are provided with opportunities to improve their education and qualifications, there is a better chance that they will find meaningful employment and be in a good position to take advantage of opportunities when they present themselves."

- Eurobodalla Shire Economic Development Strategy

"Economic development actions supporting new industry opportunities should have regard to the availability of relevant skills and the training capacity of educational institutions to provide the skills. Actions relating to or associated with labour market planning, such as the retention of skilled young people in the local area or the retention of older persons in the workforce, should have regard to the availability of support services."

- See References.

4 Regional areas profiles

4.1 Shoalhaven area profile

4.1.1 Population

99,800 persons (2016 population NSW Planning)

4.1.2 Growth Rate

3.74% (2011-2016) 0.59% average annual growth

4.1.3 Key Industry

Tourism, Health Care & Social Assistance (incl. Aged Care), Public

Administration & Safety, Defence, Construction, Manufacturing, Retail, Agriculture/Forestry & Fishing

4.1.4 Urban Centres

Nowra/Bomaderry, Milton/Ulladulla, Huskisson/Vincentia, St Georges Basin District, Culburra Beach and Sussex Inlet.

4.1.5 Location & environment

The Shoalhaven region spans 4,530.8sqkm from Berry in the north to North Durras in the south, and extends west across the Morton National Park. The City of Shoalhaven consists of a number of towns with the main commercial centres located in Nowra and Ulladulla.

The Shoalhaven includes 160km of coastline with 109 beaches, some of which are reputed to have the whitest sands in the world.

The Shoalhaven has relatively mild, pleasant weather conditions. The maximum average annual temperature in Nowra is 22.6°C, while the average annual minimum is 11.8°C.

In December the mean maximum increases to 27.5°C. On average it rains about 80 days per year, with 974.7mm of rain.

Travel time by car from Sydney to Nowra in the northern end of the Shoalhaven is approximately two hours via the Princes Highway, while from Canberra the trip is around three hours.

4.1.6 People & Community

The resident population of the Shoalhaven was 99,800 at 30 June 2016, indicating the population grew by 3.74% over the preceding four years. (NSW Planning & Environment)

Females slightly outnumbered males and the region had a population density of around 22.6 people per square kilometre (ABS 2014).

The percentage of Indigenous persons in the Shoalhaven was 4.7%, compared to a national average of 2.5% (RDA, 2011).

18.9% of locals were born overseas, well below the Australian average of 27%. The United Kingdom was the main source of migrants to the FSC (5.9%), with New Zealanders being the second source of Migrants (1.2%). Other common countries of birth included Germany, Netherlands and USA (Profile ID).

One fifth of local households (22.3%) consisted of couples with children. Just under one third (34.8%) are couples without children, and 11.2% are one parent families. A two person home had the highest percentage (40.0%).

Shoalhaven households consisted of 27.3% lone person households and 2.4% of group households.

The median age was 46.7 years, against a national median of 37.3 years. The census notes, 22.9% of Shoalhaven residents were 65 years or older (ABS).

The majority of residents identify with Christian religions, particularly Anglicanism (29.2%) and Catholicism (22.1%) while 19.9% identify as having no religion (Profile ID).

One in five residents perform volunteer work (20.2%), while 69.5% are engaged in unpaid domestic work. Unpaid domestic work consumed almost one third of women's waking hours and one fifth of men's.

4.1.7 Population Projections

It is expected that the Shoalhaven's population will grow to 108,150 persons by 2031, an increase of 12.42%.

The bulk of that growth will occur in Council's Planning Area 1, which includes Nowra, Bomaderry and Berry. There the population will rise to 109,700 by 2036, up 52.3%. The NSW Department of Planning forecasts that the proportion of older residents is set to increase.

The median age is predicted to rise to 53 years.

4.1.8 Workforce

The 2011 census records the Shoalhaven labour force consisting of 36,650 persons, with 33,848 employed (92.4%). Just over half of the labour force was engaged in full-time work (51.4%), with another 38.8% in part-time work. 2.1% of people did not state the amount of hours they worked. Data for 2017 shows a 7.8% unemployment rate.

Residents who were not part of the labour force equated to 35,650, with a participation rate of 48%.

The two primary occupational industries in the Shoalhaven were Health Care & Social Assistance (14.1%) and Retail Trade (12.8%). Public Administration & Safety employ 10.3% of the labour force with Accommodation & Food Services at 9.4%, Construction workers were not far behind on 9.3%. Manufacturing and Education & Training were close to each other, employing 7.9% and 7.7%, respectively (Profile ID).

4.1.9 Income

In the year ending 30 June 2011 there were 36,647 wage and salary earners in the Shoalhaven. In 2011, the average wage per person in the Shoalhaven was $40,272 (ABS), compared to NSW's average wage of $53,917 and the national average of $51,923 per year (ABS).

4.1.10 Economy, Industry & Business

At 30 June 2014 there were 6,439 businesses in the Shoalhaven.

Just over half of the registered businesses in the area are non-employing (3,716), while 1,836 are micro businesses with four or fewer employees and 1,198 businesses employ five or more people.

Health Care & Social Assistance is the Shoalhaven's largest source of employment, engaging 14.1% of the workforce during the last census. Retail Trade accounted for 12.8% and Public Administration and Safety employ another 10.3%.

The Shoalhaven has a relatively strong Tourism industry, employing 9.4% of workers. This is largely because the Shoalhaven is a major destination area.

Compared to Regional NSW averages, the Shoalhaven has notably higher proportions of its workforce engaged in Health Care & Social Assistance, Retail, Public Administration & Safety, Tourism and Construction occupations. These particularly emphasise the growing importance of the tourism and services sectors in the local economy, as well as the significant contribution the defence sector makes.

The Shoalhaven economy appears to have less employment in industries such as Manufacturing, as well as white-collar industries including Professional, Scientific & Technical Services and Financial & Insurance Services. (Profile ID)

There are industrial estates in Nowra, Milton, Bomaderry, Culburra, Woollamia, Sussex Inlet, and Ulladulla, with rents from $45 per square meter. The main is Flinders Industrial Estate in South Nowra.

Industry	Shoalhaven	Regional NSW
Health Care & Social Assistance	14.1%	13.0%
Retail Trade	12.8%	11.4%
Public Administration & Safety	10.3%	7.2%
Tourism	9.4%	7.7%
Construction	9.3%	7.9%
Manufacturing	7.9%	8.3%
Education & Training	7.7%	8.6%
Professional, Scientific & Tech. Services	4.4%	4.6%
Other Services	3.7%	4.2%
Transport, Postal & Warehousing	3.7%	4.7%
Administrative & Support Services	3.1%	2.8%
Agriculture, Forestry & Fishing	2.0%	5.8%
Wholesale Trade	2.0%	2.8%
Inadequately described or not stated	1.9%	2.1%
Rental, Hiring & Real Estate Services	1.7%	1.4%
Arts & Recreation Services	1.7%	1.2%
Financial & Insurance Services	1.6%	2.2%

Industry	Shoalhaven	Regional NSW
Electricity Gas Water & Waste Services	1.1%	1.5%
Info. Media & Telecommunications	1.0%	1.0%
Mining	0.4%	2.5%

4.1.10.1 Manufacturing

Despite having a relatively low share of workers in Manufacturing, the industry is one of the main income generating activities in the local economy. Some of the major manufactures in the Shoalhaven include Pentair (formerly Tyco Flow Control) – pipeline/irrigation/pumps/valves; Manildra Group – starch/gluten/ethanol; Unicorn Cheese – cheese manufacturing; Minova – mining chemicals; NowChem – chemical manufacturer; Ocean & Earth – surf clothing; Hanlon Group – windows and doors; BAE Systems Australia – aviation/avionics; Raytheon – aviation/avionics. Other manufactured goods and/or processed products include timber, agricultural machinery, chemicals, foodstuffs, plastic injected products, steel fabricated goods, building frames and trusses, sporting goods, and defence systems (Shoalhaven the Enterprising Alternative). Manufacturing contributes around $450M to the economy, with the number of businesses in this industry more than doubling in the last twenty years (IRIS Research).

4.1.10.2 Agriculture

The Shoalhaven has rich lands with vast waterways, which are ideal for agricultural production. Agriculture contributed around $70M to the local economy through dairy, nursery, seed and flower products. There are also a number of wine producers in the region. In addition, the fishing industry is worth around $25M. Local abalones, in particular, are being exported to Japan (IRIS Research).

4.1.10.3 Defence

The Shoalhaven has a thriving defence industry, which boosts the region's Public Administration & Safety sector. Facilities include HMAS Creswell, HMAS Albatross and the adjacent Aviation Technology Park. The primary task of HMAS Albatross is to support the four Naval Air Squadrons, which provide air support to the fleet. The four squadrons and the aircraft they operate are:

- 723 Squadron with AS350 Squirrel and Bell 429 helicopters
- 816 Squadron with S-70B Seahawk helicopters and
- NUSQN 808 with MRH-90 helicopters.
- 725 Squadron with MH-60R helicopters

816 Squadron will receive a new Helicopter Flight Aircrew training System in 2018, representing an investment of $157MHMAS Creswell is located on the south-western shores of Jervis Bay in the Jervis Bay Territory.

Creswell consists of the RAN College and four other departments. The School of Survivability and Ship's Safety teaches firefighting, damage control and nuclear, biological and chemical defence. Listed on the National Register as a significant heritage site, a quarter of HMAS Creswell's buildings are heritage listed (Navy, 2013).

Recognised contractors in the area include Lockheed Martin, Raytheon, Sikorski Helitech, BAE Systems, CAE, Boeing Defence, and other SME's such as – Partech Systems, Global Defence Solutions and Air Affairs. It employs more than 2,000 people and injects more than $100M in salaries into the Shoalhaven economy each year. The completion of Main Road 92, which links Nowra to Canberra, should help further the Shoalhaven's advantage in this industry (IRIS Research, 2013).

4.1.10.4 Education

The University of Wollongong has a campus at West Nowra, which it shares with the Illawarra Institute of TAFE. The University offers degrees in Arts, Commerce and Nursing, as well as graduate Management and Education programs and Graduate School of Medicine.

TAFE NSW has sites at Ulladulla and Nowra offering courses in Trades, Health, Community Services, Aged Care, Mental Health, Disabilities, Hospitality, Tourism, Child studies, Business, Cultural Arts, IT and Industry legislative compliance.

There are also community colleges located at Bomaderry and Ulladulla.

The Shoalhaven is home to 23 primary schools and 5 high schools. There are also 8 independent schools, half of which provide schooling from kindergarten to year 12.

As of 2011, over half of the Shoalhaven working age population have some form of higher education qualification. 55.2% of people have post school qualifications.

4.1.10.5 Tourism

The beauty of the Shoalhaven's beaches has made it one of New South Wales' most popular regional tourist destinations, with between 2.0 and 2.5 million visitors each year.

The Shoalhaven has 66 tourist accommodation establishments (5+ rooms), with over 1,000 guest rooms in total. In the year ending June 2015, Shoalhaven City and Jervis Bay Territory combined, attracted an estimated 2.79 million visitors, comprising 1.345 million domestic and over 40,000 international visitors who stayed one or more nights in the region, as well as 1.403 million day visitors. These visitors spent an estimated $698 million in the region.

The Tourism sector is also a major employer in the region, responsible for 6,890 direct and indirect jobs (SCC).

Popular tourist attractions include whale and dolphin watching cruises, Shoalhaven Zoo, Nowra Speedway and Jervis Bay Marine Park, as well as numerous national parks and vineyards.

4.1.10.6 Property

The median price paid for a house in the Shoalhaven during 2013 was $350,000. The median rental price for a two bedroom dwelling is $295 per week and the weekly price paid for a three bedroom dwelling is $305.

4.1.10.7 Infrastructure

The Shoalhaven is located on the Princes Hwy. The Hume Hwy is accessed via Kangaroo Valley, and both the Kangaroo Valley route and Main Road 92 link Nowra to Canberra.

The Shoalhaven is serviced with water, sewerage, electricity and LP gas, while natural gas is limited to the Nowra/Bomaderry area.

The South Coast Correctional Facility at South Nowra commenced operations in 2010 and was built at a cost of $130M. The Centre provides 250 jobs and injects $20M per annum into the local economy (SCC, 2013). Additions to this facility will add a further 360 beds and create 90 new positions in addition to 2,380 jobs in the construction phase.

There are three public hospitals and one private hospital, as well as various GP services. A Cancer Care Centre was completed in 2013.

4.2 Eurobodalla area profile

4.2.1 Population

38,400 persons (2016 population)

4.2.2 Growth Rate

3.77% (2011-2016) 0.46% average annual growth

4.2.3 Key Industry

Tourism, Retail, Health & Community Services (incl. Aged Care)

Construction, Agriculture/Fishing

4.2.4 Urban Centres

Batemans Bay, Moruya, Narooma, Tuross Heads, Tilba, Bodalla

4.2.5 Location

The Eurobodalla Local Government Area is located along the New South Wales south coast, approximately 280km south of Sydney and 150km east of Canberra.

The region comprises around 3,421.7sqkm of land, between Durras and Wallaga Lake. Around three quarters of this mountainous region is national park or state forest.

Eurobodalla is bounded on the east by more than 100km of pristine coastal waters and marine parks with 83 beaches and 4 major river systems and 20 lakes.

The region’s primary road arteries are the Princes Highway and the Kings Highway. The main residential centres are Batemans Bay, Narooma and Moruya.

4.2.6 People & Community

It is estimated that as of 30 June 2016 the Eurobodalla Local Government Area had a resident population for 38,400 people. Females slightly outnumber males (RDA).

There were 11 people per square kilometre of land in Eurobodalla.

The shire is unusual, in that 37% of ratepayers are non-residents.

As at 2011, 5.1% of Eurobodalla residents were of Indigenous heritage, while another 13.7% were born overseas; 6.2% were from the United Kingdom, 1.2% were from New Zealand, 0.9% from Germany and 0.6% from the Netherlands (Profile ID).

According to the census, there were a total of 14,337 households in the region.

Eurobodalla families consisted of 34.1% of couples with no children, of that, 17.1% are older couples without children, which suggests an older population with many empty nesters. Over a quarter had dependent children (29.4%) and 10.1% were one-parent families.

The median age in the Eurobodalla LGA was 51.8, compared to a national average of 37. One quarter (25%) of the estimated resident population is aged 65 years or older.

The dominant religions in the area are Anglicanism (27.9%) and Catholicism (23.0%). 22.6% of residents do not identify with any religion.

4.2.7 Population Projections

It is expected that the Eurobodalla Shire's population will increase to 40,650 by 2031, an increase of 9.6%.

Forecasts suggest that the number of households in the Eurobodalla will increase from 15,672 in 2006 to 22,316 in 2031, with the average household size decreasing slightly from 2.33 to 2.25 persons.

This is consistent with the prediction that the Eurobodalla population is aging. While the number of residents aged under 15 years will increase by an estimated 27.7% over that 25 year period, the number of persons aged 65 years or over will increase by 68.3%. This older age group will account for over a quarter of the Eurobodalla population (27.6%).

Females will still slightly outnumber males at 50.3%.

In 2011, the number of births per year was 337 and the fertility rate in the Eurobodalla Shire has increased 2% since 2007.

4.2.8 Workforce

In 2017 the Eurobodalla labour force consisted of 14,340 people. 92.5% of the labour force was employed (13,265) while 7.5% was unemployed (1,076 persons). Just under half of the labour force engaged in full time work (47.3%), with another 42.9% in part time work. 2.3% did not state the amount of hours they worked.

The local workforce was fairly evenly split across occupational groupings. 14.8% was in the Retail Trade, compared to 13.6% in the Health Care & Social Assistance industry. Tourism accounted for 11.6%, followed by Construction (10.9%), then Education & Training (8.2%) and Public Administration & Safety (6.1%) (Profile ID).

4.2.9 Income

There were 12,165 wage and salary earners in the Eurobodalla Local Government Area at 30 June 2011. Overall they earned $440.8M that financial year, equating to an average of $36,231 per person compared to NSW's average wage of $53,917 and the national average of $51,923 per year (ABS).

4.2.10 Economy, Industry & Business

At 30 June 2015 there were 2,763 businesses in the Eurobodalla Shire. (ABS)

More than half of registered local businesses are non-employing (1554), while 846 are micro businesses with four or fewer employees. Just 361 businesses hire five or more employees. (ABS)

Retail is the largest industry in the Eurobodalla employing 14.8% of the work force, followed by 13.6% in Health Care & Social Assistance. A further 11.6% were working in Tourism, while 10.9% were employed in Construction.

The strength of the services sector in the region is largely explained by the importance of tourism and the growing aged care sector given the increasing proportion of older residents.

Traditionally, the Eurobodalla Shire has been an agricultural area, with extensive grazing lands and highly productive dairy producers. Today the Agriculture, Forestry and Fishing industry accounts for 2.7% of Eurobodalla workers, down from 4.6% in 2001. Other dominant industries include Education and Training (8.4%), Public Administration and Safety (6.1%) and Manufacturing (4.9%), while 4.2% of Eurobodalla workers were employed in Professional, Scientific and Technical Services.

Industry	Shoalhaven	Regional NSW
Retail Trade	14.8%	11.4%
Health Care & Social Assistance	13.65%	13.0%
Tourism	11.6%	7.7%
Construction	10.9%	7.9%
Education & Training	8.4%	8.6%
Public Administration & Safety	6.1%	7.2%
Manufacturing	4.9%	8.3%
Professional, Scientific & Tech. Services	4.2%	4.6%
Other Services	4.2%	3.9%
Transport, Postal & Warehousing	3.4%	4.2%
Tourism	3.3%	2.8%
Agriculture, Forestry & Fishing	2.7%	5.8%
Inadequately described or not stated	2.1%	2.1%
Wholesale Trade	1.8%	2.8%
Rental, Hiring & Real Estate Services	1.8%	1.4%
Arts & Recreation Services	1.7%	1.2%
Financial & Insurance Services	1.5%	2.2%
Info. Media & Telecommunications	1.5%	1.0%
Electricity Gas Water & Waste Services	1.2%	1.5%
Mining	0.4%	2.5%

4.2.10.1 Property

Sales figures show that the median price paid for residential dwellings during 2013 was $340,000. Renters paid a median of $200 per week for a two bedroom dwelling and $290 for three bedroom dwellings in the Eurobodalla.

4.2.10.2 Transportation

There are three private bus services operating in the Eurobodalla, as well as two long-distance coach services and a Council run community bus. Three taxi companies service the region and there is an airport at Moruya, with Regional Express offering flights to and from Sydney and

Melbourne. A multi-million dollar upgrade and redevelopment of Moruya Airport is planned to include an improved terminal, a new tourism precinct, an increase of the apron to receive more planes and the opening up of 14 hectares of employment lands.

4.2.10.3 Education

The Eurobodalla Shire is home to 9 primary schools and 4 high schools, as well as a college catering for K-12.

The University of Wollongong has a campus at the Batemans Bay Education Centre, offering full courses in Arts, Commerce, Graduate Education and Graduate Management.

TAFE NSW has training facilities at the Batemans Bay Education Centre and has a campus in Moruya. TAFE NSW delivers courses in Aged Care, Disabilities, Trades, Hospitality, Tourism, IT, Business, Horticulture, Agriculture and Industry legislative compliance.

There are other Registered Training Organisations including a Community College in the Eurobodalla.

Over half of the Eurobodalla working age population (54.8%) have some form of higher education qualification.

4.2.10.4 Sports & Recreation

In addition to the various water sports available along its many beaches and lakes, there are three aquatic centres located in the Eurobodalla Local Government Area. These are at the main urban centres of Batemans Bay, Moruya and Narooma.

4.2.10.5 Tourism

The tourism sector has become increasingly important to the Eurobodalla economy over recent decades, with particular marketing emphasis on ‘Paddock to Plate’ food ventures and ecotourism.

While many come to the region for its beaches and bush hinterland, Eurobodalla is also home to many other popular tourist attractions such as Mogo Zoo, Mogo’s Original Gold Rush Colony, the Eurobodalla Regional Botanic Gardens Montague Island and South Coast Sea Planes.

The annual Oyster Festival attracts several thousand visitors, many of whom stay overnight or longer.

Eurobodalla Shire has 45 tourist accommodation establishments (five or more rooms), offering nearly 1,000 rooms. Eurobodalla Shire Council’s Tourism Statistics shows a total of 1,221,000 visitors in the year ending June 2014 with a total of just over 2.5M domestic and international guest nights. Domestic overnight visitors averaged expenditure of $394 per visit, with domestic day visitors averaging $121 per visit. International overnight visits contributed and average of $301 per visit. In total, visiting tourists contributed $733M over the entire year. (Destination NSW)

Tourism accounted for 3,686 direct and indirect full time jobs in the year ending June 2016, with approximately 1200 part time and casual positions during the same period.

4.3 Bega Valley area profile

4.3.1 Population

34,200 persons (2016 population)

4.3.2 Growth Rate

3.17% (2011-2016) 0.48% average annual growth

4.3.3 Key Industry

Tourism, Retail, Health Care and Social Assistance and Manufacturing

4.3.4 Urban Centres

Bega, Bermagui, Merimbula, Pambula, Eden, Tathra

4.3.5 Location & Environment

Bega Valley Shire is the largest local government area within the Far South Coast region of NSW, covering 6,277.6 square km of land. Three quarters of the Shire is National Park lands or State Forest.

The Shire spans from Bermagui in the north, to the Victorian border in the South, along more than 200km of coast line. Its main urban centres include Bega, Merimbula, and Eden.

Bega Valley is located approximately halfway between Sydney (6 hours) and Melbourne (6 hours) with Canberra approximately 3 hours away.

The region experiences mild, pleasant weather conditions. December reaches an average maximum of 27°C, the July winter temperature falls to an average minimum of 2.4°C.

4.3.6 People & Community

The resident population of Bega Valley Shire was 34,200 at 30 June 2016 indicating that the population grew by 3.17% in four years.

The region has a relatively low population density of around 5.4 persons per square kilometre.

During the 2011 census, 2.8% of the population identified itself as Indigenous, marginally higher than the national average of 2.5%. Females slightly outnumbered males at 50.5%.

The percentage of the local population born overseas was 11.7%, compared to a national average of 27%. United Kingdom was the primary region of birth, with others immigrating from New Zealand, Germany and the Netherlands (Profile ID).

Bega Valley families consisted of 33.2% of couples with no children, of that, 14.2% are older couples without children. Over one fifth (22.6%) of households consisted of couples with children, the highest percentage are couples with young children (12.0%). Single parents with children make up 9.7% of households, while 25.8% were persons living on their own. Group households accounted for 2.5%.

Anglicanism (27.3%) and Catholicism (20.1%) are the main religions. A relatively high 26.7% do not identify with any religion, compared to the regional NSW benchmark of 18.4%.

Over a quarter of the resident population engaged in volunteer work (26.3%), and three quarters engage in unpaid domestic housework (73.6%).

4.3.7 Population Projections

It is predicted the resident population will increase to 36,250 by 2031, which equates to a growth of 9.96% or 0.48% per annum.

The NSW Department of Planning forecasts also show that Bega Valley's population is aging – a trend occurring across the nation. In the thirty years to 2036, the proportion of the population aged 65 years or older will rise from 15.8% to 34.2%. Children aged 0-14 years will account for 15.0% of residents, down from 23.5%.

As a result, the median age is expected to rise from 48 years to 54 years over that time.

4.3.8 Workforce

In 2015 the Bega Valley labour force consisted of 13,792 persons. Of these, 94% were employed (13,042) (Profile ID).

826 people, or 6% of the labour force, identified themselves as being unemployed and looking for work. 11,168 people were not part of the labour force, resulting in participation rate of 52.6%. More recent data quotes the unemployment rate at less than 5%. (South Coast Regional Jobs & Investment 2017).

The occupational classifications of Health Care & Social Assistance, Retail Trade and Tourism account for over one third of the local work force, at 13.1%, 12.3% and 11.1% respectively. These figures were all above the Australian averages of 13.0%, 11.4% and 7.7%. Manufacturing accounted for 9.3% of workers, which is a fraction higher than the national benchmark of 8.3%.

Another 8.7% of workers were in the Construction industry, while Education & Training comprised of 7.7% of the workforce, one in six people was employed in the Agriculture, Forestry & Fishing industry (6.6%). Public Administration & Safety workers accounted for 5.2% and Professional & Scientific & Tech. Services for 4.3%.

Recent labour force data shows that the local unemployment rate stands at 4.7% in 2017. This was lower than the average of 7% for the Far South Coast, higher than on the national unemployment rate of 5.01%. Around 827 Bega Valley residents were looking for work (My Region & Profile ID).

4.3.9 Income

As at 30 June 2011, there were 18,239 taxable and non-taxable individuals in the area. Together they had a combined annual income of $641.2M, an average of $35,158 per person compared to NSW's average wage of $53,917 and the national average of $51,923 per year (ABS).

4.3.10 Economy, Industry & Business

At the end of the 2011 financial year there were 2,954 registered businesses in the Bega Valley Shire. Just over half were non-employing businesses (56.6%), while 785 businesses were micro businesses employing less than four people and 496 businesses employed five or more people. (ABS)

The Shire's major industrial precincts are at North Bega, Eden and South Pambula. The main retail areas are the town centres of Bega, Eden and Merimbula. (Profile ID)

The Bega Valley economy has transformed over the last few decades with a move away from agriculture. Health Care & Social Assistance is the largest industry by employment size, it accounted for 13.1% of all workers in the Bega Valley during the last census. The Retail Trade industry was not far behind at 12.3%. Both were above the Australian averages of 13.0% and 11.4% respectively, emphasising the importance of tourism in the region.

Tourism employed 11.1% of local workers. Manufacturing in the workforce has grown by 0.1%, reaching 9.3%. Bega Valley's most famous manufactured product is Bega cheese, which is exported around the world. Other manufactured goods include timbers and metal products. Construction's share of output decreased from 9.2% in 2008 to 8.7% in 2011, making it the fifth largest income generating activity in the local economy. Education and Training followed at 7.7%, while the Agriculture, Forestry & Fishing workforce account for 6.6% of local output.

Industry	Shoalhaven	Regional NSW
Health Care & Social Assistance	13.1%	13.0%
Retail Trade	12.3%	11.4%
Tourism	11.1%	7.7%
Manufacturing	9.3%	8.3%
Construction	8.7%	7.9%
Education & Training	7.7%	8.6%
Agriculture, Forestry & Fishing	6.6%	5.8%
Public Administration & Safety	5.2%	7.2%
Professional, Scientific & Tech. Services	4.3%	4.6%
Transport, Postal & Warehousing	4.1%	4.2%
Other Services	3.4%	3.9%
Wholesale Trade	2.8%	2.8%
Administrative & Support Services	2.6%	2.8%
Inadequately described or not stated	2.1%	2.1%
Financial & Insurance Services	1.5%	2.2%
Arts & Recreation Services	1.5%	1.2%
Rental, Hiring & Real Estate Services	1.4%	1.4%
Electricity Gas Water & Waste Services	1.1%	1.5%
Info. Media & Telecommunications	0.8%	1.0%
Mining	0.2%	2.5%

4.3.10.1 Agriculture, Forestry & Fishing

The Shire's roots lie in Agriculture, Forestry & Fishing. The first European settlers began farming cattle in the 1830s. Dairy farming emerged within a few decades. Bega Valley also now has thriving timber and fishing operations. In 2011 the region's Agricultural production was valued at $74M. Milk accounted for $46.4M, with cattle and calf slaughter at $23.5M (economyid). Both of these sectors have experienced significant growth over the preceding five year period.

4.3.10.2 Tourism

The tourism sector continues to grow, with the Sapphire Coast a popular coastal getaway. The main tourist towns such as Bermagui, Eden and Merimbula experience a threefold boost in their populations during the peak summer tourist period.

In 2014 Bega Valley Shire received over 800,000 visitors, more than half of whom were domestic overnight visitors, spending a total in excess of around $284M. The average stay per visitor to the Bega Valley region is 4.7 nights. $789 is spent per visitor when in the Bega Valley region.

The Shire has 46 tourist accommodation establishments. With each containing five or more rooms, in total they offer visitors around 2,600 beds in more than 870 rooms.

Popular attractions in the region include the Merimbula Aquarium & Wharf Restaurant, the Magic Mountain Amusement Park, the Eden Killer Whale Museum, and the Bega Cheese Heritage Centre, as well as activities such as game fishing and whale watching (Destination NSW).

The Port of Eden – Breakwater Wharf Extension Project will allow berthing for large cruise ships providing day trips and effecting future overnight tourism opportunities for the area.

4.3.10.3 Property

The median sales price for a house in the Bega Valley region was almost $350,000 during 2013. Renters met a median weekly rental price of $250 for two bedroom dwellings. In the case of three bedroom dwellings there was a median rental price of $350 per week (Myrpdata).

4.3.10.4 Education

The Bega Education Centre is a joint initiative between the University of Wollongong, TAFE Illawarra and Bega High School, with teaching rooms, a library and a computer laboratory.

The University offers a range of courses in the faculties of Arts, Commerce, Education, Health & Behavioural Sciences and Business. TAFE NSW also has Bega Campus offering courses in Aged Care, Health, Disabilities, Hospitality, Tourism, Business Services, Engineering, Information Technology, Rural Studies and Industry Legislative Compliance.

There are 18 primary schools and five high schools (public and private) in the Shire.

There are Registered Training Organisations including a community college.

54.5% of residents aged 15 years and over have completed post school qualifications with 13% having a Bachelor or higher degree.

4.3.10.5 Infrastructure

The Bega Valley Shire is serviced with electricity, water, sewerage and LP gas. Natural gas is not yet available.

The region can be accessed by road along the Princes Highway between Sydney and Melbourne, and the Snowy Mountains Highway which connects the Shire to Canberra. There is an airport at Merimbula, with REX flying daily direct to and from Sydney and Melbourne.

There are three local bus services, and three coach services linking the Shire to Sydney and Melbourne. Countrylink also operates daily coach services from Canberra.

The region's two main hospitals are located at Bega and Pambula. There are also GPs, clinics and medical practices throughout the Shire.

The Port of Eden NSW (Snug Cove) is strategically located approximately halfway by sea between Sydney and Melbourne and is the southernmost declared Port in NSW servicing the south coast, including the towns of Bega, Merimbula, Bombala, Tumut and Cooma. It has harbour depth and navigability equivalent to Sydney. Of national security interest, it accommodates an Australian Naval wharf and munitions depot (nearby). The Port provides the primary woodchip export site in Australia, recently clocking up $2B in export revenues, and growing timber export interest from Dongwha (formerly Tasco), Allied Natural Wood Exports (Bombala) and Visy (Tumut).

The Port of Eden has well-established port service providers including harbour tugs, launch services, stevedores, marine engineers and ships' chandlers and retains a commercial fishing fleet, even after industry adjustment and closure of the fish cannery. The Port Authority of NSW is assuming operational management of the Port from NSW Maritime.

Importantly, the Port of Eden has historically been recognised as a 'port of refuge' to coastal shipping and currently presents as a safe haven for Sydney-Hobart ocean racers, as well as enjoying a significantly increased profile amongst ocean cruise liners and the growing Super Yacht market. Limited research indicates the scale and frequency of racing between NSW ports into Victoria and Tasmania will increase with the benefit of safe harbour and berthing facilities at Eden.

Funding was finalised in 2016 following concept design and feasibility studies for the extension of the breakwater wharf. Tenders have now been called for the construction of this facility. The Port of Eden - Safe Harbour Project (wave attenuator) in Snug Cove, will allow safe mooring of recreational vessels. These projects, in conjunction, have attracted over $54million in project funding and will bring vastly increased tourism investment and employment opportunities to the region. These improvements to the port will also facilitate increasing capacity for smaller recreational vessels and the local fishing fleet.

While currently servicing a number of oil and gas field supply and support vessels, the sale of oil production assets has led to a reduction in associated commercial activity within the port precinct.