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Executive Summary

REGIONAL OVERVIEW
This overview provides a broad brush stroke picture of the region including the strengths and weaknesses of each LGA, and the challenges and opportunities all of which are detailed in the main body of the Plan.

Region
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.

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

The FSC is strategically located between 3 of the nation’s main capital cities, approximately 2 to 5 hours from Sydney, 8 to 10 hours from Melbourne and just 2 hours from Canberra.

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

The region generally has mild, pleasant weather. The summers are warm, ranging in temperature from 20°C to 37°C while the winters generally range from 1°C to 12°C (Bureau of Meteorology).

People & Community
The estimated resident population of the FSC as at 30 June 2011 was 166,035 persons. More than half of these were in the Shoalhaven, 96,043.

The population increased by 2.4% between the years 2007 to 2011 and currently has a density of around 11.8 people per square kilometre (ABS 2011).

Population Projections
According to the NSW Department of Planning, the population of the FSC is expected to reach 226,000 by 2031, this is an increase of 36%.

Singles and childless couples will dominate the region in the future. This is strongly influenced by persons aged 65 and older.

Persons aged 65 years and older will make up 35% of the population in 2031, up from 20.6% in 2006. Conversely, the share of children aged between 0-14 years will decrease from 18.8% to 14.7%. The median age will be mid-50s
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 – classified as unemployed (ABS).

More recently, the average unemployment rate for the FSC was 6.61% for the June 2012 quarter, compared to the national average of 5.28% (My Region).

As of 1 July, 2013 RDA FSC was appointed the Regional Certifying Body (RCB) for the Far South Coast of NSW. RDA FSC utilises local knowledge, NSW Skill Priorities List and the RDA FSC South Coast Skills Audit when assessing applications.

Income

In the year ending 30 June 2009, the FSC’s average wage was $39,423 per year. NSW’s average wage was $46,599 per year and the national average was 46,599 per year (My Region).

Economy, Industry & Business

At 30 June 2011 there were 12,684 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. Accommodation & Food Services employ 10.1% of workers, Construction 9.4% and Public Administration & Services employ 8.4% of workers. These industry employment percentages for the FSC are all higher than 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.

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 and Nowra Chemicals with specialised and niche manufacturing on the increase.
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 three Naval Air Squadrons, which provide air support to the fleet.

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 fire fighting, 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).

Agriculture & Aquaculture
The FSC was traditionally an agricultural region. The rich lands and vast waterways in the area are ideal for agricultural production. A number of FSC agricultural goods are being successfully exported around the world, including Bega dairy and Shoalhaven abalone which is 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 oysters, timber, beef, flowers, seeds and wine and has a growing aquaculture industry supplying oysters, mussels and scallops to domestic and international markets. In total, local agricultural and aquaculture production was identified as contributing in excess of $110M in 2001, half of which was from livestock products such as beef and milk (NSW Dept. of Planning, 2007).

Education
The University of Wollongong has campuses located in all three LGAs; Nowra, Batemans Bay and Bega. Students can complete studies in a range of courses from the Arts, Commerce, Aquaculture, Nursing, Education and Health & Behavioural Science faculties.

The Illawarra Institute of TAFE also has campuses at Nowra, Ulladulla, Moruya and Bega offering courses in subjects such as Agriculture, Hospitality, Tourism, Information Technology and Child Studies.

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

Education and Training employs 7.9% of the region’s workforce.

Tourism
Tourism is one of the biggest employers within the FSC region and as such, is one of the sectors requiring the most infrastructure support. The NSW south coast is the third most visited region in NSW, attracting 4,279 million visitors.
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 over-night visitors. Over 60,000 international visitors travel to the FSC region each year (Destination NSW, 2011).

**Property**

The FSC offers a wide range of housing options with both residential and holiday homes available at various price points. In the Shoalhaven, the median dwelling sale price was $369,000 in 2013. Eurobodalla was slightly lower at $340,000, while Bega Valley’s median house price was $323,000.

**Infrastructure**

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

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. There are regional airports at Moruya and Merimbula with REX offering flights to and from Sydney, Melbourne and Canberra.

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 section 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.
STRATEGIC REGIONAL PLAN

The Regional Development Australia – Far South Coast Strategic Regional Plan 2013-2018 represents a vision for the South Coast region of NSW that encompasses the following five key goals and priorities:

1. Broaden our economic base
2. Build infrastructure capacity
3. Preserve and nurture our natural environment
4. Improve our quality of life
5. Engage our community

These goals and priorities have been developed with extensive community consultation and authoritative input from the RDA Far South Coast Committee. The Plan includes direction and priorities from existing Federal, State and Local Government strategies and planning documents and takes into account the comments of local business people, health and education providers, women, young people and students, Indigenous Australians, our agricultural community, professional people, the disadvantaged and the disengaged. It recognises geographic and demographic issues within the community and aims to include all groups. The RDA Far South Coast Committee recognises Government priorities within the region and understands the concerns and aspirations of its local communities.

As a living document, the Strategic Regional Plan (SRP) is flexible and able to adjust to take into account changing needs and priorities.

The major focus of the Plan, and its updates, is a long term vision for the Region that aims to provide infrastructure led economic development and job creation, the integration of high speed broadband into the region, improved transport and sustainable and affordable clean energy all the while increasing regional competitiveness through innovation; education and training; attractive and affordable lifestyle, including access to first class health, education and aged care facilities whilst continuing to retain and care for our unique, natural environment.

As well as a long term vision, the SRP aims to educate and advise Governments and other regional stakeholders on immediate, practical and attainable priorities.
The projects identified by the RDA FSC Committee to achieve those immediate priorities include but are not limited to:

- Port of Eden upgrade and expansion
- High speed broadband
- Moruya airport upgrade and extension
- Merimbula airport upgrade
- Highway upgrades to Princes & Kings Highways
- Completion of Main Road 92
- Albatross Aviation Technology Park upgrade
- Greater investment in Equine Tourism, Food and Wine Tourism and specialist niche tourism sectors such as weddings
- Greater investment and planning in Aged Care facilities and services
- The potential for an Equine Industry Region of Excellence
- Public and private partnerships for tourism developments such as the Shaolin Temple, the Shoalhaven Motorsports Complex at Yerriyong and Sapphire Coast Marine Discovery Centre and Two Rivers Walk
- Investigation of clean energy opportunities for the region
- Retention and expansion of the SYVI/SCYVI project
- Funding and re-establishment of the Indigenous Employment Expos
- Pursuit of Aquaculture opportunities including Australia’s Oyster Coast
- Continuation of the South Coast Business Chambers’ Forum

The Strategic Regional Plan promotes social inclusion and, while representing the broader community, also offers a voice to the disadvantaged and the disengaged.

Our Vision remains focused: to be economically diverse and prosperous, to be environmentally sustainable and socially inclusive; to be innovative and creative while ensuring a sustainable, attractive and liveable future for the South Coast and its residents.
Introduction and Background

REGIONAL DEVELOPMENT AUSTRALIA

What Is Regional Development Australia?

Regional Development Australia (RDA) is a partnership between Australian, State, Territory and local governments to strengthen regional communities.

The national network of 55 committees is made up of local leaders who volunteer their time to work with all levels of government, business and community groups to support the development of their regions.

The committees work with their communities to find ways to address local economic, social and environmental issues. They build partnerships to develop strategies and deliver sustainable infrastructure and services to their regions.

They also work with each other to identify issues that cross regions.

As the regional development voice of their communities, RDA committees:

- consult and engage with communities
- promote and participate in regional programs and initiatives
- provide information and advice on their region to all levels of government, and
- support informed regional planning.

The Australian Government funds these committees and so do State, Territory and Local Governments in some jurisdictions.

Refer also to RDA website (www.rdafsc.com.au).

Core Principles

The following underpinning principles were agreed by the Regional Development Council (RDC) in Broome on 30 July 2008:

- Integrated arrangements: the Australian, State, Territory and Local Governments will continue to work towards the eventual adoption of more integrated and aligned arrangements for regional engagement and economic development, recognising that alignment is necessarily a long term process.

- A commitment to collaboration: where possible, the three levels of government collaborate at the regional level.

- Common boundaries: review existing boundaries to align Regional Development Australia Committees (RDAs), state regional development organisations and local government boundaries wherever possible.
• Acknowledging the differences: regional engagement and economic development structures vary across the Australian Government and States and Territories.

• The intention for tripartite arrangements: local regional development structures to involve the three tiers of government, including joint membership of committees and the Regional Development Australia National Advisory Council.

• Sharing of information: improve information sharing on regional development activities and outcomes.

• Purpose and role of RDAs and state regional development organisations: work towards a shared purpose.

• Cross membership: as opportunities arise, work towards a degree of cross membership of committees.

• Joint funding: where possible collaborate through joint funding of regional development bodies to enable an increase in the scope of their activities.

• Co-location: where possible co-locate regional development offices to facilitate better communication and minimise duplication of facilities.

**Roles and Responsibilities of RDA**

A key role for Regional Development Australia (RDA) committees is to deliver information about programs, services, grants and initiatives for regional development offered across all levels of government to local stakeholders. RDA committees are encouraged to be first point of contact for government agencies wanting to consult with a region.

Refer also to RDA website (www.rda.gov.au).

**Purpose of Regional Plan**

The Strategic Regional Plan (SRP) and its updates, set out a clear and certain vision and direction for the South Coast, which balances the demands for future growth with the need to protect and enhance environmental values and ensure economic sustainability. The SRP applies to the local government areas of Shoalhaven, Eurobodalla and Bega Valley and is for use as a consultative tool for Government bodies looking to make decisions that may affect the South Coast region.

The SRP represents an agreed government position on the future of the South Coast. It is the pre-eminent planning document for the South Coast region and has been prepared to complement and inform other relevant State and Federal planning instruments.
The primary purpose of the SRP is to ensure that the South Coast retains those characteristics that make it such a uniquely liveable environment while adequately addressing identified gaps or shortfalls and providing for the future needs of the region and its increasing population.

The SRP maps the way for the provision of sufficient new urban and employment lands to meet expected demands for growth and incorporates the specific regional infrastructure requirements necessary to sustain the existing community while also accommodating the projected population expansion. The SRP will continue to identify future infrastructure investment priorities for the South Coast. Infrastructure planning will take into account the broad planning framework identified in the Strategy, to ensure that future population growth is supported by services and associated infrastructure.

Progress on actions identified in this SRP will be monitored annually. The SRP is intended to be a living document and will be comprehensively reviewed on a regular basis so that it can adjust to any demographic, economic, environmental and political changes.

**Regional Plan Overview and History**

This SRP continues to guide activities in the Far South Coast region of NSW and assist RDA Far South Coast to offer strategic leadership. The SRP offers a long term outlook for the region and is underpinned by strategic goals to achieve its Vision. It also articulates priorities to be addressed over the next five years and, through the Business Plan, a short term annual strategy for economic growth and job creation.

Much of the foundation for the SRP was developed by a Sub-Committee during meetings conducted throughout the region. Members of the sub-committee were cognisant of existing Australian and State Government policies and initiatives. This understanding, coupled with analysis of the strengths and challenges facing the Far South Coast region of NSW allowed the Sub-Committee to develop a comprehensive Plan and build a strategic vision for the region.

The Sub-Committee focused on building on existing documents rather than duplicating them. A draft document then progressed through an extensive consultation process with the full RDA Committee and other stakeholders. Updates to the SRP continue to reflect subsequent Local, State and Federal planning works and documents.
The Region

Population: 166,035 persons (2011 population)

Growth Rate: 2.4% (2007-2011) 0.48% ave. annual growth
(1.1% average annual growth)

Key Industries: Retail, Construction, Manufacturing, Education, Defence, Tourism, Agriculture, Aquaculture, Aged Care and Allied Health Services

Council Areas: City of Shoalhaven, Eurobodalla Shire and Bega Valley Shire

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

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

The FSC is strategically located between 3 of the nation’s main capital cities, being approximately 2 to 5 hours from Sydney, 8 to 10 hours from Melbourne and just 2 hours from Canberra.

The FSC is renowned for its natural beauty, with nearly 400km of coastline; numerous marine parks and expansive areas of breathtaking national and state parks.
The region generally has mild, pleasant weather with warm summers ranging in temperature from 20°C to 37°C while the winters generally range from 1°C to 12°C (Bureau of Meteorology).

**People & Community**

The 2011 census identified the resident population of the FSC as 166,035 persons with more than half in the Shoalhaven (96,043).

The population has increased by 2.4% between the years 2007 to 2011 and currently has a density of around 11.8 people per square kilometre.

This census noted that 4.7% of the population identified itself as being of Indigenous heritage, compared to a national average of 2.5% (ABS).

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.

**Population Projections**

According to the NSW Department of Planning, the population of the FSC is expected to reach 226,000 by 2031, this is an increase of 36%.

While the Shoalhaven will account for the greatest numerical increase in the region’s population, it is Eurobodalla Shire that will record the greatest proportional increase. The Shoalhaven and Bega Valley LGAs will each achieve an annual average increase of 1.3% to 129,010 and 45,300, respectively. Eurobodalla Shire will grow by an average of 1.7% per annum to 54,900 people.

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, this is strongly influenced by persons aged 65 and older, which is expected to represent 35% of the population by 2031 (Dept. of Planning).
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 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. Accommodation & Food Services 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 6.61% for the June 2012 quarter, compared to the national average of 5.28% (My Region).

Income
In the year ending 30 June 2009, the FSC’s average wage was $39,423 per year. NSW’s average wage was $48,793 and the national average was $46,599 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).

Economy, Industry & Business
At 30 June 2011 there were 12,684 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. Accommodation & Food Services 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.
<table>
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<tr>
<th>INDUSTRY</th>
<th>FSC</th>
<th>REGIONAL NSW</th>
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<tr>
<td>Health Care &amp; Social Assistance</td>
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<tr>
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<tr>
<td>Accommodation &amp; Food Services</td>
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<td>Construction</td>
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<td>Education &amp; Training</td>
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<tr>
<td>Manufacturing</td>
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<tr>
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<td>Electricity Gas Water &amp; Waste Services</td>
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<tr>
<td>Mining</td>
<td>0.3%</td>
<td>2.5%</td>
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</tbody>
</table>
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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, Clyde River Oysters, Specialty Papers and Shoalhaven Abalone.

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 three Naval Air Squadrons, which provide air support to the fleet. The three squadrons and the aircraft they operate are:

- 723 Squadron with AS350 Squirrel helicopters
- 816 Squadron with S-70B Seahawk helicopters and
- NUSQN 808 with MRH-90 helicopters.

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 fire fighting, 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).

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The FSC was traditionally an agricultural region. The rich lands and vast waterways in the area are ideal for agricultural production. A number of FSC agricultural goods are being successfully exported around the world, including Bega dairy and Shoalhaven abalone which is 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 oysters, timber, beef, flowers, seeds and wine and has a growing aquaculture industry, supplying oysters, mussels and scallops to domestic and international markets. In total, local agricultural and aquaculture production was identified as contributing in excess of $110M in 2001, half of which was from livestock products such as beef and milk (NSW Dept. of Planning, 2007).

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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 faculties.
The Illawarra Institute of TAFE also has campuses in each LGA, offering courses in subjects such as Agriculture, Hospitality, Tourism, Information Technology and Child Studies.

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

Education and training employ 7.9% of the regions workforce.

**Tourism**

With 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 4.279 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 60,000 international visitors travel to the FSC region each year.

There are over 86 tourist accommodation establishments with five or more rooms in the FSC which offer approximately 2,261 guest rooms (Destination NSW 2011).

Each LGA within the FSC region has in place a Destination Management Plan. This in turn feeds up to a Regional Destination Management Plan developed through the South Coast Regional Tourism Organisation (SCRTO). The RDA FSC Committee and Executive worked closely with each LGA and the SCRTO in the development of these plans.

**Property**

The FSC offers a wide range of housing options with both residential and holiday homes available at various price points. In the Shoalhaven, the median dwelling sale price was $369,000 in 2013. Eurobodalla was slightly lower at $340,000, while Bega’s median house price was $323,000.

**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. Moruya and Merimbula have regional airports that provide access to Sydney, Melbourne and Canberra (Dept. of Planning) and Shoalhaven has the South Coast Correctional Facility at South Nowra. Commencing operations in 2010 and built at a cost of $130M, the Centre provides 250 jobs and injects $20M per annum into the local economy (SCC, 2013).

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.
Stakeholders

RDA Far South Coast understands that successful regional planning cannot be undertaken and finalised before an effective consultation process has taken place. By working collaboratively with a range of often contrasting stakeholders to identify the economic, environmental and social factors which define the region, RDA Far South Coast was able to implement a holistic strategy.

Stakeholder Groups

Stakeholders present numerous opportunities for collaboration and partnerships which are developed throughout the implementation process identified in our Business Plan.

In particular, RDA Far South Coast complements the business and human services already provided in the region by the three levels of government; however, the importance of working with smaller groups to add value to specific activities is also recognised.
The agency and policy documents identified above were consulted in the preparation and development of the RDA Far South Coast SRP, its updates and RDA FSC policy, strategy and research documents.
Vision
To be economically diverse and prosperous, to be environmentally sustainable and socially inclusive; to be innovative and creative while ensuring a sustainable, attractive and liveable future for the South Coast and its residents.

Mission
Strengthen the partnership with South Coast stakeholders to maximise the economic, environmental and social potential of the region.

Nowra Bridge – Shoalhaven

Narooma Wharf – Eurobodalla

Disaster Bay – Bega Valley
Goals and Priorities

The goals and priorities pursued by RDA Far South Coast seek to achieve results that benefit the regional economy, its environment and the people who live and work in the region.

RDA Far South Coast is cognisant of the need to constantly look forward and include long term goals whilst continuing to address the more immediate shorter term challenges. In formulating the SRP and its updates, RDA Far South Coast sets up the processes to achieve its vision through an ongoing five year process that addresses immediate priorities while instigating the framework to achieve its long term vision. Through ongoing reviews, a flexible approach is implemented to address identified priorities, proposed activities and specific actions ensuring they remain relevant to the region’s changing circumstances.

The following five goals are our priorities for the region:

1. Broaden our economic base
2. Build infrastructure capacity
3. Preserve and nurture our natural environment
4. Improve our quality of life
5. Engage our community
1. Broaden Our Economic Base

Economic Overview

It is estimated that at least 25,800 new jobs are required in the region to support the projected 60,000 population growth (South Coast Regional Strategy 2006-31). The region's economic base needs to rapidly diversify, shifting from a reliance on traditional primary industries to a wider range of economic opportunities. It is important to avoid an over-reliance on the service oriented industries such as aged-care and tourism as, for the most part, these industries offer low-paid or entry level positions which, while filling a role for the area's unskilled or younger workers, does little to improve the base median salary of the region or contribute to much needed diversification. The existing employment base in retail, tourism, aged care, primary industry, defence and manufacturing needs to be maintained and supported by encouraging diversification, innovation and growth and identifying and addressing skills shortages.

Currently the unemployment rate in the RDA South Coast region is significantly higher than the national rate and according to government data; employment rates are not comparative with the national rate. This situation results in both the outward migration of young people in search of work and the lowering of the median income of families opting to remain in the region (ABS, 2011).

The region has a limited range of infrastructure assets that support economic development and employment, including the Port of Eden which is the main port for the South Coast. Eden Port supports export activities, commercial fishing and increasingly, cruise ships. Moruya and Merimbula have regional airports that currently provide direct access to Sydney and Melbourne and are the gateway for essential legal, medical and other professional service delivery.

Geographically, the region is long and narrow extending more than 400 kilometres in length, which is a challenge for regional businesses wishing to link with potential markets and export opportunities. The Princes Highway is a critical north-south link between Sydney, Wollongong and communities along the South Coast to the Victorian border. The Princes Highway is the primary land transport route servicing the South Coast as the railway does not extend south of Bomaderry at the northern end of the Shoalhaven local government area. The Kings Highway, which links Batemans Bay with Canberra and the unfinished Main Road 92, which connects Nowra with Canberra via the Kings Highway, are important east-west road corridors that require scheduled upgrade and maintenance programs to ensure issues are addressed in a timely manner. The recent spate of fatalities on the Kings Highway is unacceptable and highlights the urgent need for infrastructure upgrades in the region. Unlike other areas, the South Coast region relies heavily on one main freight and transport corridor in the Princes Highway. Even minor accidents can result in the closure of this route, disrupting business to an unacceptable
degree and thereby hindering growth in the area. When trying to attract new business or skilled professionals to the area it is a difficult sell when the main transport routes are so unreliable.

Further, if the region is to grow economically and socially in line with government policies and programs (Regional Relocation Grants, etc.) then an extensive infrastructure works program will need to be identified, funded and implemented as soon as possible. Without such a strategic program to cater for and attract human capital, the region is in danger of becoming a social, cultural and economic backwater. The region is currently at a cross roads with higher than average rates of unemployment, domestic violence, drug and alcohol abuse and multi-generational reliance on welfare. These factors, plus increasing numbers of retirees moving to the region do not augur well for a socially, culturally and economically prosperous and diverse region capable of attracting and retaining the skills and people this region desperately needs.

**Economic Development and Employment Growth**

The forecast population increase of 60,000 by 2031 will require the identification of sufficient employment and land capacity to provide a projected 25,800 new jobs. As of May 2004 there were 907 hectares of available vacant zoned employment land within the region to accommodate the forecast new jobs (Dept. of Planning, 2006-2031).

Each Council has a supply of employment lands, which will be retained to provide a regional competitive advantage. In recognition that localised supply factors such as tenure, constraints and serviceability may reduce the development of some employment lands; Councils will monitor the supply and take up of land. Where regular monitoring indicates localised shortages, Councils will be encouraged to secure additional employment lands to address shortfalls and ensure positioning of new employment lands considers ease of access to transport.

The South Coast has three major population centres, in Nowra-Bomaderry, Batemans Bay and Bega. All three play a key economic role within the region, which can be further strengthened by locating new finance, administration, business services and retail jobs within these centres.

As the population grows, particularly within the over 55 age group, the region's employment base is likely to increase in the areas of finance, administration, business services, health and aged care to ensure services to the growing demographic. Tourism is also a key growth and opportunity sector (over $1.8B was spent by visitors to the region in 2009), particularly in nature-based accommodation (Tourism Industry Facts & Figures, 2010). As both tourism and aged care offer largely low-paid, low-skilled employment the SRP will encourage and support diversification within the employment base through local projects and particularly infrastructure investment.
Agriculture, forestry and fishing have historically shaped the settlement of the South Coast region. The productivity of these industries continues to rely on the availability of high quality natural resources as well as defining the character and liveability of the region however, while agriculture, forestry and fishing jobs will continue to be important employment sources, the proportion of these jobs in overall South Coast employment figures is declining (Profile ID). In response to this decline there is growing interest in the marketing and consumption of local food and increasing importance placed on regional food security. Both these factors may work to slow the decline in agriculture employment in the region. This movement, while strongly supported within the community, is hampered by limited investment. Employment outcomes would increase exponentially with any financial investment. The SRP will encourage and support diversification within these industries through local and regional projects and skills training, particularly in areas with identified skills shortages as recognised within the South Coast Skills Audit.

The region possesses extensive livestock, wood and maritime enterprises, substantial tourism capacity, defence, aerospace, general manufacturing and an equine industry that shows great potential. It is important to ensure suitable measures, land and facilities are identified and available to build on these strengths. The Illawarra and South Coast Employment Lands Update (NSW Dept. of Planning, 2009) has produced a database of employment lands within the Region. The continual update of the database will help agencies and Councils to monitor employment lands supply. The strategy also provides land use planning principles for employment lands to maintain an adequate future supply.

Regionally significant employment lands and infrastructure within the South Coast includes HMAS Albatross, HMAS Creswell, Merimbula and Moruya airports, Port of Eden, Batemans Bay Marina and Ulladulla Harbour and includes the Princes and Kings Highways and the rail corridor to Bomaderry.

The economic challenges and opportunities are to:

- Ensure sufficient employment lands are available in appropriate locations to accommodate growth in existing and emerging industries and businesses
- Ensure adequate, safe road systems to support manufacturing, freight and other employment sectors while enabling the safe passage of residents and visitors
- Provide alternate transport systems that provide reliable methods of travel within the region
- Provide affordable energy sources for business and residential use
- Support and strengthen the existing employment base in primary industries and defence sectors (HMAS Albatross and HMAS Creswell) and supporting industries
• Investigate and encourage opportunities to diversify into niche food markets, manufacturing, equine, alternate energy sources, community and human services, education, health and aged care.

• Encourage and support growth by ensuring the adequate provision of services to facilitate business, employment, education and training such as increased high speed broadband access and the necessary skills required to implement this.

• Support and strengthen tourism opportunities by identifying and supporting the development of key tourism sites and precincts as identified in the local Destination Management plans for the Shoalhaven, Eurobodalla and Bega Valley and targeting the focus areas while highlighting the regions natural environmental attractions.

• Encourage partnerships with the third sector to meet increased needs for community services

Outcomes
Reversal of the low socio-economic trend within the region and a restructure of social, cultural and economic well-being.

Employment and residential growth will be concentrated around existing well serviced South Coast commercial centres such as Nowra-Bomaderry, Batemans Bay and Bega.

Economic development and employment growth particularly in finance, administration, business service, health and aged care, equine and tourism jobs will be facilitated by identifying suitable employment and investment opportunities and providing employment lands and reliable sources of energy and ICT to support these opportunities. Local government will be proactive in identifying employment lands in suitable locations.

The economic value of natural resources and natural environments in the South Coast will be recognised as an employment generator due to its importance to industries including tourism, agriculture, food security, forestry and fishing.

Actions

• Encourage and support the early implementation of high speed broadband to the region

• Support planning principles for employment lands, as developed for the Illawarra and South Coast Employment Lands Strategy

• Encourage local government to maintain the current net supply of zoned employment lands
• Respond to skills shortages and training opportunities across the region as identified within the South Coast Skills Audit

• Consideration may be given to support for zoning changes that address concerns regarding tenure, location, constraints and specific opportunities

• Support local environmental plans that protect and add to employment lands in existing economic centres, including major regional centres and major towns and identify and protect all regionally significant employment lands including: Albatross Naval Base, Merimbula and Moruya airports, Port of Eden, the multipurpose wharf at Eden, Batemans Bay Marina and Ulladulla Harbour

• Liaise with local government with regard to the monitoring of agricultural and employment lands, including their appropriate location and zoning

• Support local food industries to diversify and build on tourism capacity and ensure food security for the region

• Support local tourism bodies to investigate the identification of appropriate sites for major tourism developments, and specific ‘tourism precincts’ (such as Two Rivers Walk, Ulladulla Harbour and the Bundian Way for example). These sites may focus on:
  • nature tourism
  • equine
  • art, food and wine production
  • farm gate sales
  • food and wine tourism
  • cultural and heritage tourism
  • Indigenous tourism
  • visiting friends and relatives market
  • touring market
  • short breaks market
  • weddings
2. **Build Infrastructure Capacity**

Key infrastructure in the south coast region of NSW includes roads, rail links, ports, airports, communication and energy facilities, water storage, distribution facilities and major commercial infrastructure such as the Bega Cheese factory, Manildra, the Shoalhaven Paper Mill, large serviced apartment developments and the Port of Eden. Other infrastructure provides the elements that contribute to lifestyle and quality of life such as housing, retail, property, services, sporting and recreational facilities.

The proposed population increase for the region requires infrastructure issues to be specifically addressed in the areas of: residential; retail; commercial; health; aged care; education; child care; utilities, tourism, transport needs, sporting and recreational needs.

Significant contributors to the economy including tourism, aged care, defence, education and health will only realise their growth potential through access to high speed broadband and improvements to infrastructure, transport, communications and community facilities.

As identified in the South Coast Skills Audit, investment in the South Coast’s economic infrastructure and reform of infrastructure markets is critical to improving regional productivity particularly in an era of structural ageing. Well-performing infrastructure will help drive a more diverse, competitive and sustainable economy that generates substantial and lasting economic, environmental and social benefits. Revitalisation projects such as the Shoalhaven Tourism Board’s ‘Motel Mojo’ initiative are vital.

An infrastructure-led economy on the south coast of NSW will directly increase the volume and quality of Australia’s capital stock and facilitate enhanced private sector activity. By increasing the amount and quality of capital that workers have available, infrastructure investment will play a key role in supporting labour productivity and improving the quality of life through increased wages, improved facilities and supporting jobs growth potential (RDA FSC NSW South Coast Skills Audit, 2012).

**Road & Rail**

*Transport Accessibility*

There are transport and accessibility limitations within the South Coast Region due, in part, to its dispersed settlement pattern. The major road network, including the Princes and Kings Highways and the unfinished Main Road 92 are exceptionally important for connecting communities, supporting economic development, and linking to neighbouring regions. Immediate and increased work is needed to ensure the long term viability of these vital road infrastructures. The impacts on regional growth and settlements from these regional road networks cannot be underestimated while the consolidation of centres and settlements and urban design objectives such as neighbourhood planning principles will help to support improved transport choice within the region, including public transport options which are extremely limited.
With the rail line ending at Nowra/Bomaderry, located in the far north of the region, and the bus network running largely to school timetables, public transport options are limited. There are cabs and dwindling community transport for those in need; however, by and large, the community must rely on their own vehicles.

This over-reliance on privately owned vehicles not only creates greater carbon emissions but also contributes significantly to road congestion. It creates a cultural and social divide between those who can and those who cannot afford a vehicle. The impact of limited public transport is keenly felt in tourism where many visitors arrive in the region expecting to be able to further explore the area via public transport. The negative consequences, through subsequent word-of-mouth disparagement, when these visitors are disappointed causes irreparable damage to the tourism industry which in turn impacts on tourism jobs, often most affecting those at the lower end of the socio-economic spectrum.

Road
The biggest inhibitor to growth in the south coast region is the lack of an adequate north-south freight and transport route. An area of over 14,440 square kilometres with only one main road, the Princes Highway, has proven to be and remains a formula for disaster. Minor accidents frequently close the only north-south transport link for the entire south coast region often for over twelve hours at a time. Alternate routes usually include sub-standard roads unsuitable for two wheel drive vehicles.

The disruption to transport, freight, business, tourism, education and health is unacceptable and the flow on effects impact negatively on growth for the area. The social impacts of road deaths upon the community (five in one weekend in April 2012 on the Kings Highway), cannot be measured or over emphasised. Major upgrading of the both the Princes Highway and Kings Highway is urgently required, as is the completion of the only alternate route, Main Road 92.

Rail
Long term expansion of the rail network will be required to service the growing needs of the south coast region and to facilitate future urban growth in the Sydney-Melbourne corridor. Immediate and future plans will need to identify land for rail extension and local government plans will need to take into account the future needs of the rail network as it extends through the south coast region. Should this not be feasible, negotiations to identify and provide a viable alternative to rail must be commenced as a matter of urgency.

Airports
There are airports at Merimbula and Moruya, with Regional Express (REX) offering flights to and from Sydney and Melbourne. The professional services made available to the community, such as legal and various medical services including specialist consultants
such as oncologists and paediatricians, through the operation of these two airports are invaluable and, while other transport routes await upgrades, are irreplaceable.

**Merimbula Airport**

Merimbula Airport supports commercial flights and is centrally located providing access to most experiences within 1.5 hours drive. The airport supports a local population of around 4,000 and approximately 32,000 within the broader Bega Valley Shire and serviced some 65,000 passengers in 2008. The current airport, situated on the banks of the coastal waterways of Merimbula, has a 1,600m x 30m strip which can service aircraft up to medium sized jets (A320). Due to restrictions of strip strength, length, apron and terminal facilities the airport is only able to attract regional aircraft. There is the potential to increase visitation from the international market by providing more regular and competitive direct air access to Merimbula. This would require an extensive consultative process including environmental, economic and social impact assessments to be undertaken to investigate the possible expansion of the airport to service 737 and other mid-sized jets. Also required is an effective case for increased services. This would be enhanced by a significant investment in the form of a runway extension (up to 1800m), apron development, and new terminal development and associated works totalling approximately $20M (Tourism Australia, 2010).

**Moruya Airport**

Moruya Airport is owned by Eurobodalla Shire Council. The local Council has developed an airport plan that includes an industrial airpark and it is intended that upgrades to the airport will open the region to a range of new national and international visitors. Runway, terminal and equipment upgrades will need to be undertaken to facilitate the introduction of small jets thus allowing expansion and development not only in tourism markets but also the establishment of new industries and a range of new business opportunities (ESC, 2010).

**Ports**

**Port of Eden**

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 Tasco (Bombala) and Visy (Tumut). Eden has sound HML transport links to the Princes, Monaro and Federal Highways and landside capable of expansion.
The Port of Eden has well established port service providers including harbour tugs, launch services, stevedores, marine engineers and ships chandlers and remains a major marine fishing port, even after industry adjustment and closure of the fish cannery. Sydney Ports Corporation is assuming operational management of the Port from NSW Maritime.

While currently servicing a number of oil and gas field supply and support vessels, the expansion of the Bass Strait fields eastward will push the Port of Eden into strategic and logistic prominence as it becomes substantially closer than the Victorian ports. 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.

NSW Lands in conjunction with Bega Valley Shire Council has prepared a suite of concept design and feasibility studies for the extension of the breakwater wharf, wave attenuator and freight route proposed to develop the Port, concluding in a presentation of a business case to Infrastructure Australia, Sydney Ports and NSW Maritime for investment between federal, state and local government.

Eden provides safe harbour to ocean racing vessels. Limited research indicates the scale and frequency of racing between NSW ports into Victoria and Tasmania would increase with the benefit of safe harbour and berthing facilities at Eden.

While a smaller private marina off Cattle Bay is understood to be under consideration, a more substantial marina protected by the attenuator may attract private capital investment with associated tourism facilities landside.

Communication

Growth plans for the south coast region are significantly hampered by the lack of reliable communications. RDA Far South Coast identified the need for a reliable high speed broadband network in its inaugural SRP, as one of its highest priorities. While Nowra, in the north, had been listed in the next stage of the fibre optic rollout and Merimbula, in the south, has been named as the first satellite delivery location, the coastal region between these two points remains in limbo. To boost our regional economy and attract industry investors and skilled workers, high speed broadband needs to be delivered to the entire south coast region as a matter of urgency. Inclusion of the entire region in an integrated, strategic rollout will allow upgraded communications capabilities that attract business and jobs growth; offer expanded delivery of health service upgrades, education streamlining and reliable ICT service delivery to defence, other agencies and businesses.

Health and Aged Care

Residents have access to a range of public and private hospitals and a range of public and private health care professionals and services. However, with the forecast population increases and an ageing demographic, it is critical that investment is made in health
infrastructure 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.

**Energy & Water**

The region’s climate is advantageous for clean energy projects including, but not limited to, wind and solar.

Widespread commercial development of clean and/or renewable energy may be preceded by transition fuel sources such as natural gas. A gas fired power station development has been approved within the Shoalhaven area of the south coast and the ability to offer transition-style power to energy intensive industries will assist business attraction to the region.

The long narrow shape of the Region and remoteness of many of its town and villages makes the efficient and cost-effective provision of water, energy and waste services a substantial challenge. The three local councils in the Region manage their own water and waste services, while energy-generation is undertaken by private companies and State-owned corporations. Transgrid, which is owned by the NSW Government, operates the high voltage transmission network while the supply of energy to customers is the responsibility of Integral/Country/Origin Energy.

Many of the region’s smaller towns and villages are experiencing increasing demands on infrastructure and services, particularly during the seasonal holiday period (TNSW, 2009). Peak demand periods could increase the risk of localised blackouts and pollution of sensitive ecosystems (as a result of sewage overflow) if the carrying capacity of infrastructure is exceeded. Many of the region’s landfills will reach capacity during the life of the SRP. Concentrating growth in the major regional centres and major towns provides an opportunity to more efficiently use existing and augmented water, energy and waste infrastructure.

The security of water supply is an important issue for the region due to the potential impacts of climate change and drought. The completion and implementation of the four water-sharing plans that will apply to the region (i.e. Sydney Metropolitan Water Sharing Plan, South Coast Macro Water Sharing Plan, Bega Water Sharing Plan and the State Groundwater Macro Water Sharing Plan) prepared by the Department of Natural Resources are important to ensure equitable sharing of available water between different users.

Substantial challenges lie ahead in securing safe, clean energy sources for the region, not only to service existing users but also to cover the predicted 35 percent increase in population. Safe, clean and reliable energy source alternatives will attract and secure major business such as manufacturing to provide jobs for both the existing population and the projected population influx.
At the local scale, the Government’s recently introduced Building and Sustainability Index (BASIX) requirements will ensure homes are designed to use less water and be responsible for fewer greenhouse gas emissions by setting energy and water reduction targets for houses and units.

**Population & Housing**

Settlement in the south coast is characterised by many small dispersed towns and villages (78 have a population of less than 5,000). Allowing settlement to disperse even further has the potential to degrade natural environments, create infrastructure and service delivery inefficiencies, and contribute to social isolation and car dependency.

The south coast currently has a population of approximately 166,000 and the SRP anticipates a further population increase of 60,000 over the next 25 years. Future households in the region will be dominated by singles and childless couples (77 percent of new households) strongly influenced by the 65+ age group. Current housing stocks cater for a different household market with 85 percent of all dwellings being detached. Encouraging a more appropriate mix of dwellings is a major challenge for the region.

Managing the release of available lands for urban development to minimise the impact on sensitive environments and maximise growth around existing well serviced centres and towns is important to the sustainability of future communities.

It is projected that an additional 45,600 dwellings will be required in the region by 2031 to accommodate population growth and changing demographic trends. A regional settlement overview is provided below.

**Shoalhaven**

An additional 26,300 dwellings will be required in the Shoalhaven over the next 25 years, of which 15,800 can potentially be accommodated within existing vacant urban land and existing investigation areas. The majority of this land is located around the major centre of Nowra – Bomaderry and the major towns of Ulladulla and Vincentia (which includes the Jervis Bay – St Georges Basin area). The remaining 10,500 dwelling ‘supply gap’ will be accommodated through medium – density development within the town centres, including at least 6,700 dwellings in the Nowra area (as identified in the Nowra – Bomaderry Structure Plan).

**Eurobodalla**

An additional 10,700 dwellings will be required to cater for growth in Eurobodalla over the next 25 years. Existing vacant urban land, more than half of which is located around the major regional centre of Batemans Bay (which includes the group of settlements from North Batemans Bay to Malua Bay) and the major towns of Moruya and Narooma, will accommodate 7,600 of these dwellings. The remaining 3,100 dwelling supply gap will be accommodated within and adjoining these centres through medium – density development and investigation areas to be identified in the endorsed Eurobodalla Settlement Strategy.
**Bega Valley**

The future demand for dwellings in Bega Valley is estimated to be 8,600 over the next 25 years. However, the shire is oversupplied with vacant urban land, particularly around Bega, which could potentially accommodate 15,200 dwellings. Although this figure is likely to decline once natural constraints are taken into accounts, Bega Valley will still remain well supplied with vacant urban land.

The demand to live in coastal areas, coupled with the existing land supply in coastal centres such as Merimbula (including the adjoining settlement of Tura Beach), Bermagui and Eden will mean that the majority of growth is likely to be located in these centres over the next 25 years. As coastal and inland settlements cater for different markets, minor additions to the coastal land supply may be considered in centres such as Bermagui, provided it does not jeopardise the growth of Bega as the major regional centre.

In the longer term however, housing growth within and around the existing centre of Bega will become the focus for housing in Bega Valley. This will be achieved through the take-up of already zoned land, the restriction of new urban zonings along the coast and the encouragement of development within the current boundaries of the urban area. Higher densities in the Bega centre will be encouraged through improvements in local amenity as well as allowing for development that complements higher order service provision, e.g. retail, health and education.

**Rural Landscape & Rural Communities**

In 2001, agriculture was identified as contributing in excess of $110 million to the South Coast economy each year (NSW Dept. of Planning, 2007) and is a significant regional employer, (e.g. eight percent of Bega Valley workers have jobs in agriculture). Rural landscapes are also an important part of the scenery, amenity and lifestyle that makes the region an attractive place for residents and tourists.

As a result of the region’s fertile soils and generally reliable rainfall patterns, the South Coast has great capacity for the sustainable production of food and fibre. At the same time, strong migration to the South Coast is placing productive agricultural lands under threat from urban and rural residential expansion. Putting in place strategies that recognise the value of primary industries and protect the land use for future generations is important for the future of the region.

There are approximately 19,000 hectares of land zoned for rural residential purposes, adding to the many existing small ‘rural living’ lots scattered throughout the region. A consistent and planned approach to this form of housing is important to protect valuable agricultural land, natural resources and ensure sustainable food production and local food security. In general, unplanned rural residential development is undesirable because it creates land use conflict with agricultural users, land speculation, social isolation and is environmentally unsustainable.
Rural residential areas must be located close to existing centres and away from areas that may in future have value as future urban land or primary industry locations.

Key planning issues affecting the viability of sustainable agricultural businesses within the region include increasing land prices, land use conflict, protection of landscape aesthetics, transport infrastructure and services, lack of affordable energy sources, water availability and integrated regional planning.

**The infrastructure challenges and opportunities are to:**

- Provide a framework for the planning of new and upgraded regional infrastructure and facilities for the growing population and changing demographic
- Upgrade the Princes Highway, Kings Highway and complete Main Road 92
- Incorporate rail expansion or a viable alternative in long term strategies
- Investigate alternate solutions to public transport limitations
- Seek to improve employment opportunities through stevedoring, providoring, tourism and aged care
- Identification of funding to improve and increase health and aged care infrastructure to meet future demand
- Encourage development of clean energy plants and resources while ensuring affordable current energy needs can be met
- Increase the proportion of young families within the region and reduce the out-migration of youth by providing vibrant town centres with increased job, education, training, health care, social and cultural opportunities
- Prioritise and manage the release of vacant urban lands to maximise development in-and-around well serviced centres while minimising development in sensitive locations
- Identify new and existing employment lands that can deliver sustainable development outcomes where demand is demonstrated
- Provide housing choice and affordability in appropriate locations, reflecting changing demographics and associated reduction in household size

**Outcomes**

All levels of government are aware of the region’s infrastructure needs and priorities and work together to achieve timely infrastructure outcomes.

Reliable and accessible transport will be available across the region to all demographics through a network of publicly available transport options such as road, rail, bus and community transport.
Princes Highway, Kings Highway and MR92 upgraded to a standard acceptable to both domestic and international tourism standards while offering safe and reliable passage to local residents and freight users. Improved transport choice will be supported by consolidation of settlements and centres and sustainable urban design.

Safe, reliable and economically viable sources of energy will be widely available across the region allowing for industry attraction and expansion and jobs creation. Households will benefit from reduced energy bills and the environmental advantages which result from clean energy.

Future urban development, including public and community housing, will be prioritised to support infill housing as well as new residential subdivisions located adjacent to existing well serviced centres and towns and away from isolated and sensitive locations. The benefits of focusing development in existing centres include reducing greenhouse emissions and more efficient use of infrastructure and services thereby assisting in creating vibrant town centres.

Existing and identified new urban areas around well serviced centres such as Nowra – Bomaderry, Batemans Bay and Moruya will accommodate demands for environmentally sustainable development.

Regionally integrated planning for tourism precincts, aged care, education, health and transport.

Reliable high speed Broadband is available across the region.

**Actions**

- Make representation to government authorities wherever possible to ensure the region’s infrastructure needs are recognised and given priority
- Liaise with the community to identify infrastructure and transport priorities
- Work with all levels of government to advance the implementation of a safe and reliable regional transport network
- Support the expansion of Merimbula and Moruya Airports
- Support the extension and expansion of Eden Port
- Investigate clean energy options and, where possible, other energy alternatives
- Infill housing and new residential subdivisions located adjacent to existing well serviced centres and towns will be encouraged through the three Councils’ land release planning
- Staged land release to support the orderly release of new housing will be encouraged with support for the delivery of key infrastructure such as electricity, water and sewer as a tool to implement the staging program
• Only urban areas which are/will be identified in the final versions of the following documents are supported:
  – Nowra-Bomaderry Structure Plan
  – Sussex Inlet Settlement Strategy
  – Jervis Bay Settlement Strategy
  – Milton-Ulladulla Structure Plan
  – Eurobodalla Settlement Strategy
  – Bega Structure Report
  – Eden Structure Report
  – Bermagui Structure Plan
  – Merimbula Structure Plan

• Any additional development proposed will need to demonstrate that it can satisfy sustainability criteria.

• Support regionally integrated planning for tourism precincts, aged care, education, health and transport.
3. Preserve and Nurture Our Natural Environment

The region’s coastline and associated estuaries, lakes and wetlands are amongst the most unspoiled and scenic in NSW. However, the significant environmental, economic and social values that the coast provides to the region and the state are threatened by a wide range of development pressures that need to be carefully managed. This careful management is particularly critical in light of the region’s predicted population increase over the next 25 years.

The South Coast contains areas of high conservation value (NSW Dept. Of Planning, 2007), and approximately 44 percent of the region is conserved in a range of protected areas including national parks and reserves, forestry reserves and voluntary conservation agreements on private land. However, much of the remaining vegetation located on private land is also of high conservation significance.

Urban growth and development in the region has the potential to further impact on existing, yet to be identified, cultural heritage sites and places. The identification, recording and protection of cultural heritage is important for current and future generations as it contributes to community identity and well being, sense of history, local and regional visual character and reinforces the economic base for tourism.

The region also contains areas of high conservation value for aquatic biodiversity some of which are and will be protected in the Jervis Bay and Batemans Bay marine and national parks, and in reserves. Forty four (44) coastal lakes, estuaries, bays and rivers have been identified within the region as having significant habitat values (NSW Dept. of Planning, 2007). The catchments to these lakes and estuaries need to be appropriately managed to avoid water quality impacts on their aquatic habitats.

The region has significant surface and groundwater resources that are important for town water supply. Many towns in the southern part of the region are totally dependent on groundwater from coastal sands and alluvial aquifers for town water supply.

The environmental, economic and social values of the region’s rivers, coastal lakes and estuaries can be severely impacted through over extraction of water, contamination and diffuse pollution as well as the threats engendered by the growth in access needs to water for stock and domestic purposes. Whilst the majority of water supply catchments are protected within national parks and State forest, catchment impacts from private lands also need to be minimised.

Utilising land resources within their capability is a key challenge for both rural and residential development. Stakeholders are expected and encouraged to plan and manage these resources to achieve long term environmental sustainability.
The environmental challenges and opportunities are to:

- Preserve and nurture our natural environment
- Incorporate environmental considerations in all planning processes and documents
- Encourage tourism projects and ventures which showcase and maximise the return from the region’s natural environmental attractions
- Balance environmental protection with the community’s needs and demands for urban and commercial development

Outcomes
The quality and distribution of the region’s biodiversity will be maintained and enhanced over time.

Urban development will be directed away from areas known to be or likely to be important for conservation. Urban development will be located on largely cleared land or areas where only limited clearing of native vegetation with low conservation values is required.

Important natural assets, many of which also have biodiversity values, will be identified and protected through an appropriate planning process. The condition of sensitive catchments will be maintained or improved, avoiding downstream impacts on significant biodiversity habitats.

Within coastal waterways, oyster-growing areas, fish nursery and habitat areas will be protected and managed. Town water supply catchments and aquifers will be protected to reduce impacts on water quality and supply.

The values and functions of riparian corridors and coastal wetlands will also be protected and enhanced.

Actions
- Consideration will be given to the location and conservation significance of areas being verified for new urban development
- Water supply catchments and significant aquifers will be protected against the potential to reduce quality and/or quantity of these assets
- All levels of government will work with stakeholders to ensure that the aims and objectives of catchment action plans and conservation plans are considered in the future management and planning of local council areas
- Balance ongoing environmental safeguards against the need for recreational, urban and employment development
- Encourage use of conservation measures such as rainwater tanks, grey water re-usage, etc.
4. Improve Our Quality of Life

The South Coast region presents an enviable lifestyle offering an attractive, sustainable and liveable environment to all its residents and visitors. However, as with most areas of Australia the region includes population centres and groups of people who face significant disadvantages when seeking to achieve their full potential. The forecast population growth and climate change also pose many challenges to liveability and sustainability, both economic and environmental, across the entire region.

Focusing effort on assisting those suffering disadvantage will have a positive impact on other issues and challenges within the region.

The provision of basic services such as transport, health and education is a challenge in some communities and a greater balance of service delivery is required across the region. Balancing the delivery of basic services is the need to also make available recreational and sporting facilities and provision of arts and cultural activities.

Unemployment is a significant issue in each of the three LGA’s (see Appendices: Table 2) and has an ongoing impact on the quality of life. Young people are forced to abandon the region should they seek to further their educational and career prospects as opportunities in region are limited. There is evidence of multi-generational, long-term unemployment in some communities across all age groups.

Within the Indigenous population of 4.7% (compared to 2.5% nationally) can be found some of the most disadvantaged groups and high school retention rates reflect that fewer Indigenous children complete Year 12 (ABS, 2011).

The successful South Coast Indigenous Employment Expos held from 2008 to 2012 addressed the issues of aspirations, ambitions and employment with a focus on ‘learn to earn’. Funding for this popular program was withdrawn in 2013 to the disappointment of RDA FSC, the community, schools, previous exhibitors, the regional councils and the business community.

However, despite all the above, the major challenge for maintaining and improving liveability across the region, results from the predicted population increase of 60,000 people over the next two decades and the need for 45,600 new homes and 25,800 new jobs. This forecast population increase will make excessive demands on already strained infrastructure and on all aspects of liveability i.e. transport; education; health and the environment.

An in-migration of retirees to the South Coast seeking a coastal lifestyle (‘sea changers’) and an out-migration of youth have resulted in an ageing population (current median age of 48 years compared to 38 years for NSW). The population aged 65 years and over is expected to increase in the region from 20 percent to 35 percent by 2031 (NSW State Plan, 2009). This will increase the demand for appropriate housing as well as local
services and amenities such as public transport, recreation, sporting facilities, cultural amenities, shopping, health care and medical services (ABS, 2011).

**Health**

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, 2012).

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. 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.

**Education**

The region offers ten Government high schools, forty six Government primary schools, three non-Government high schools, six non-Government primary schools and six schools offering education through years K – 12.

Wollongong University operates campuses offering a number of undergraduate and post graduate courses at Nowra, Batemans Bay and Bega. Other universities, including Charles Sturt and University of New England, offer courses through distance education however capacity to access complex course material and research via internet is hampered by a lack of high speed broadband services in the region as well as areas that are still compelled to rely upon dial up services.

An effective education system has the capacity to unlock the talents of our people and to drive the local economic development. The current situation in the region offers limited educational pathways and therefore restricts potential.

At the time of the 2006 Census, nationally 19% (or more than 55,000) of Indigenous persons aged 15 years and over reported Year 12 as their highest level of school
completed, compared to 45% of non-Indigenous persons. In the RDA FSC region Year 12 educational attainment reported in the Census reported 16% and 30% for Indigenous and non-Indigenous persons respectively.

Nationally the 2006 Census also showed that 14% of Indigenous people and 7% of non-Indigenous persons reported Year 8 or below to be their highest year of school completed. Similar rates, at 15% of Indigenous people and 8.5% of non-Indigenous persons reported for the RDA South Coast region.

A higher proportion of residents in the region left school at or before Year 10, less than 65% of Indigenous people and 56% of non-Indigenous persons compared to 69.4% and 27.5% respectively for NSW. This poor secondary retention rate has been, and continues to be, an issue within the region as there is a well documented relationship between level of education attained and income level. The median household income of $663.00 per week on the South Coast (or 65% of the national median wage) compares poorly with the national weekly median household income of $1,027.00.

Due to the high proportion of residents with low educational attainment, the region is challenged with a legacy of early school leavers, families without a learning background, parents (and children) with poor literacy skills and a dearth of role models and mentors to break this cycle.

The quality of life challenges and opportunities are to:

- Work with relevant organisations to increase access to education, health, transport and other services
- Develop programs which enable increased internet connections or other forms of increased access to information and technology
- Balance the desire for coastal living with the potential impacts of climate change
- Work with relevant organisations to increase the capacity within communities to assist and support people with low incomes, indigenous people, long-term unemployed and those who require retraining or new skills to access employment
- Increase the aspirations of those from disadvantaged backgrounds and the community as a whole
- Ensure safe communities for all including safer roads
- Balance basic living requirements with the need for sporting and recreational facilities; arts and cultural activities
- Provide the right type of housing in the right place at the right time
• Ensure quality urban design and amenity that is sensitive to and complements the character and lifestyle of the regions towns and takes into consideration the existing communities wants and needs

**Outcomes**
A vibrant, socially inclusive and thriving community that enjoys improved health care, education, sporting, cultural and transport choices supported by consolidation of settlements and centres and sustainable urban design.

Future housing mix will be better matched to the needs of smaller households and ageing residents. This will help to strengthen the economic stability of towns.

Urban design objectives which respect climate change and the coastal character and lifestyle of the region’s towns and affordable housing strategies, such as an increased diversity of housing types, will be implemented.

Life balance encouraged through provision of activities other than those related to work.

**Actions**
• Sustainability and safety principles, e.g. walkable neighbourhoods, compact centres, water and energy efficiency and transit-orientated development will be encouraged

• Active promotion of community development and wellbeing through the provision of adaptable housing accessibility, safety and crime prevention, and quality public domain areas and facilities that provide opportunities for cultural activities and social interaction

• Support and encourage a balanced planning process that considers a healthy, holistic approach to the life cycle

• Encourage programs that increase access to education, health, transport and other services

• Encourage programs that promote aspirational expectations, community inclusiveness and civic pride

• Encourage programs that promote healthy lifestyles through better food, health and wellbeing
5. Engage Our Community

It is the aim of RDA Far South Coast to work with all levels of government, community, welfare agencies and business to ensure the region’s communities are socially and economically inclusive.

Our goal is to reduce disadvantage; increase social, civic and economic participation and develop a greater voice for every member of our community. Each person will be encouraged to realise their full potential both as an individual and as a member of the greater community. Access to education and training; meaningful occupation whether through work, family volunteer and/or carer commitments, and involvement with community groups informs us as individuals and community members when making decisions that impact on ourselves and those around us.

RDA Far South Coast will have education, training, jobs and other forms of economic participation as a key focus. Central to this focus will be the need to ensure access to technology and information thereby empowering each individual.

The gap between advantaged and disadvantaged; indigenous and non-indigenous people is unacceptable and RDA Far South Coast works closely with local communities to increase work force opportunity and participation and greater involvement in education and training thereby closing the gap.

Community engagement is vital to ensuring a socially inclusive region and building partnerships with key stakeholders both in the region and across the nation will be a significant contributor to this ambition.

The community challenges and opportunities are to:

- Work with and engage the community to ensure that RDA Far South Coast accurately represents and progresses the needs and wants of the region
- Foster a socially inclusive environment within the region and across our regional borders
- Close the gap between advantaged and disadvantaged; indigenous and non-indigenous peoples
- Ensure access to quality education, employment, recreation and health for all members of the community
- Ensure access to technology and familiarity with the internet and emerging technologies
- Enable access to reliable and safe transport
Outcomes
An engaged and informed community which actively participates in the decisions that affect its wellbeing will work together to grow the region’s social and economic prosperity.

A socially inclusive, aspirational and welcoming community that accepts and fosters the needs of the individual as well as broader community needs.

A technologically aware community which ensures its future capacity to participate in jobs and adds value to its engagement with society.

A safe and economically viable transport system that allows access to greater employment opportunities and options for community engagement.

Actions
- Pursue priority access to high speed broadband
- Investigate transport options to achieve the best outcome for the region
- Work with government and community groups to foster social inclusion and promote a sustainable economy
- Promote programs to encourage youth participation within the community
- Engage stakeholders and investigate opportunities to close the gap between advantaged and disadvantaged; indigenous and non-indigenous communities
- Increase training opportunities in areas of shortage as identified in the South Coast Skills Audit
Review

The Strategic Regional Plan 2013 – 2018 sets out the agreed position of RDA FSC for the future of the south coast region. The Strategic Regional Plan is recognised as a long term planning strategy to be used by Local, State and Federal agencies and public and private trading enterprises to understand the future infrastructure and other needs of the region.

Progress on actions identified in this Strategic Plan will be monitored annually.

The Strategic Regional Plan is intended to be a living document and will be reviewed as required so that it can adjust to any demographic, economic and environmental changes. This will assist stakeholders with their review of local plans.

Review of this Regional Plan will also underpin development of the RDA FSC annual Business Plan.

This operational Business Plan will include measurable key performance indicators and timelines so that outcomes can be tracked against goals outlined in the Strategic Regional Plan.

The Business Plan will become the instrument that ensures the RDA FSC Strategic Regional Plan remains a living document adaptable to the immediate needs and priorities of the region.
Appendix 1

Shoalhaven

Area Profile

Population: 96,043 persons (2011 population)
Growth Rate: 3.43% (2007-2011) 0.86% ave. annual growth
Key Industry: Tourism, Health Care & Social Assistance (incl. Aged Care), Public Administration & Safety, Defence, Construction, Manufacturing, Retail, Agriculture/Forestry & Fishing
Urban Centres: Nowra/Bomaderry, Milton/Ulladulla, Huskisson/Vincentia, St Georges Basin District, Culburra Beach and Sussex Inlet.

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.

**People & Community**
The resident population of the Shoalhaven was 96,043 at 30 June 2011, indicating the population grew by 3.43% over the preceding four years (RDA).

Females slightly outnumbered males and the region had a population density of around 21.2 people per square kilometre (ABS).

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 (23.0%) consisted of couples with children. Just under one third (31.5%) are couples without children, and 11.3% are one parent families. A two person home had the highest percentage (40.0%).

Shoalhaven households consisted of 26.4% lone person households and 2.3% of group households.

The median age was 46 years, against a national median of 37 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 performs 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.

**Population Projections**
It is expected that the Shoalhaven’s population will grow to 129,010 persons by 2031 at 1.3% per annum.

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 65,879 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.
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, while just over 2,800 people (7.7%) were unemployed.

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).

Income

In the year ending 30 June 2011 there were 36,647 wage and salary earners in the Shoalhaven. In 2010, the average wage per person in the Shoalhaven was $40,272 (ABS), compared to NSW’s average wage of $48,793 and the national average of $46,599 per year (My Region).

Economy, Industry & Business

At 30 June 2011 there were 6,750 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 4 or less employees and 1,198 businesses employ 5 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 Accommodation & Food Service 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, Accommodation & Food Services 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 $45m2. The main is Flinders Industrial Estate in South Nowra.

<table>
<thead>
<tr>
<th>INDUSTRY</th>
<th>SHOALHAVEN</th>
<th>REGIONAL NSW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>14.1%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>12.8%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Public Administration &amp; Safety</td>
<td>10.3%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>9.4%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Construction</td>
<td>9.3%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>7.9%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>7.7%</td>
<td>8.6%</td>
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<tr>
<td>Professional, Scientific &amp; Tech. Services</td>
<td>4.4%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Other Services</td>
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<tr>
<td>Transport, Postal &amp; Warehousing</td>
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<td>Agriculture, Forestry &amp; Fishing</td>
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<td>2.1%</td>
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<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
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<td>1.4%</td>
</tr>
<tr>
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<tr>
<td>Financial &amp; Insurance Services</td>
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<tr>
<td>Electricity Gas Water &amp; Waste Services</td>
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</tr>
<tr>
<td>Mining</td>
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<td>2.5%</td>
</tr>
</tbody>
</table>

**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 Australian Paper – paper manufacturing; 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).

**Agriculture**

The Shoalhaven has rich lands with vast waterways, which are ideal for agricultural production. Agriculture contributes around $40M 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 successfully exported to Japan (IRIS Research).

**Defence**

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

- 723 Squadron with AS350 Squirrel helicopters
- 816 Squadron with S-70B Seahawk helicopters and
- NUSQN 808 with MRH-90 helicopters.

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 fire fighting, 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 Kaman Aerospace International, BAE Systems, Global Defence Solutions and Air Affairs. It employs more than 2,000 people and injects more than $60M in salaries into the Shoalhaven economy each year. The upgrades to Main Road 92, which links Nowra to Canberra, should help further the Shoalhaven’s advantage in this industry (IRIS Research, 2013).
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. TAFE has courses in hospitality, tourism, child studies and IT. 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.

Tourism
The beauty of the Shoalhaven's beaches has made it one of New South Wales' most popular regional tourist destinations, with over 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 2011, Shoalhaven City and Jervis Bay Territory combined, attracted an estimated 1.27 million visitors, comprising 1.232 million domestic and 38,000 international visitors who stayed one or more nights in the region, as well as 1.247 million day visitors. These visitors sent an estimated $638 million in the region.

The Tourism sector is also the major employer in the region, responsible for 7,870 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.

Property
The median price paid for a house in the Shoalhaven during 2013 was $369,000. 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.

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).

There are three public hospitals and one private hospital, as well as various GP services. A Cancer Care Centre was completed in 2013.
Appendix 2

Eurobodalla

Area Profile

Population: 36,993 persons (2011 population)
Growth Rate: 0.98% (2006-2010) 0.24% ave. annual growth
Key Industry: Tourism & Accommodation, Retail, Health & Community Services (incl. Aged Care), Education
Urban Centres: Batemans Bay, Moruya, Narooma, Tuross Heads, Tilba, Bodalla

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.

People & Community
It is estimated that as of 30 June 2011 the Eurobodalla Local Government Area had a resident population for 36,993 people. Females slightly outnumber males (RDA).

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

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 15,338 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 50, 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 the Anglican Church (27.9%) and Catholicism (23.0%). 22.6% of residents do not identify with any religion.

Population Projections
It is expected that the Eurobodalla Shire’s average annual growth rate will increase by 1.3% between 2006 and 2031, taking the region’s resident population to 50,287.

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.
Workforce
The census notes show the Eurobodalla labour force consisted of 13,543 people. 92.5% of the labour force was employed (12,529) while 7.5% was unemployed (1,014 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. Accommodation & Food Services accounted for 11.6%, followed by Construction (10.9%), then Education & Training (8.2%) and Public Administration & Safety (6.1%) (Profile ID).

Income
There were 12,165 wage and salary earners in the Eurobodalla Local Government Area at 30 June 2010. Overall they earned $440.8M that financial year, equating to an average of $36,231 per person (ABS).

Economy, Industry & Business
At 30 June 2011 there were 2,980 businesses in the Eurobodalla Shire.

More than half of registered local businesses are non-employing (1737), while 741 are micro businesses with 4 or less employees. Just 502 businesses hire 5 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 Accommodation & Food Services, 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.
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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.
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.

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. The Illawarra Institute of TAFE NSW also has a campus in Moruya.

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

Sports & Recreation
In addition to the various waters ports 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.

Tourism
The tourism sector has become increasingly important to the Eurobodalla economy over recent decades.

Eurobodalla Shire has 45 tourist accommodation establishments (five or more rooms), offering nearly 1,000 rooms. ABS figures show that there were 50,000 guest arrivals during the December quarter of 2009, occupying 88,331 guest nights. There were 43,632 room nights occupied, with guests staying an average 1.8 days. In total, accommodation alone injected $5.1M into the local economy during the three months to December 2009 and $19.9M over the entire year. The March quarter generally is the most profitable.

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 and Montague Island.

The annual Oyster Festival and Great Southern Blues Festival each attract several thousand visitors, many of whom stay overnight or longer.
Appendix 3

Bega Valley

Area Profile

Population: 32,999 persons (2011 population)
Growth Rate: 1.1% (2007-2011) 0.27% ave. annual growth
Key Industry: Tourism, Agriculture, Fishing & Forestry, Retail, Manufacturing
Urban Centres: Bega, Bermagui, Merimbula, Pambula, Eden, Tathra

Location & Environment
Bega Valley Shire is the largest local government area within the Far South Coast region of NSW, covering 6,277.6 sqkm of land. Three quarters of the Shire is National Park lands.

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 (8 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.

**People & Community**

The resident population of Bega Valley Shire was 32,999 at 30 June 2011 indicating that the population grew by 1.1% in four years (ABS).

The region has a relatively low population density of around 5.3 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%).

**Population Projections**

It is predicted the resident population will increase to 45,300 by 2036, which equates to a growth of 60.1% or 1.5% 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 44 years to 54 years over that time.

**Workforce**

At the 2011 Census the Bega Valley labour force consisted of 13,870 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%.
The occupational classifications of Health Care & Social Assistance, Retail Trade and Accommodation & Food Services 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 was 6.0% in 2011. This was slightly lower than the average of 6.39% 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).

Income
As at 30 June 2010, 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. The national average for all wage and salary earners in Australia was $49,100 (ABS).

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 4 people and 496 businesses employed 5 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.

Accommodation & Food Service organisations 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.
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**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 2006 the region’s Agricultural production was valued at $58.7M. Milk accounted for $37.9M, with cattle and calf slaughter at $14.7M (IRIS Research).
**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.

On average, Bega Valley Shire receives over 727,000 visitors each year, more than half of whom are domestic overnight visitors, spending around $284M each year. The average stay per visitor to the Bega Valley region is 4.7 nights. $582 is spent per visitor when in Bega Valley.

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).

**Property**

The median sales price for a house in the Bega Valley region was almost $323,000 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).

**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. The TAFE offers courses in hospitality, business services, engineering, information technology, arts, media and rural studies.

There are 18 primary schools and five high schools (public and private) in the Shire. 54.5% of residents aged 15 years and over have completed post school qualifications.

**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 Tasco (Bombala) and Visy (Tumut). Eden has sound HML transport links to the Princes, Monaro and Federal Highways and landside capable of expansion.

The Port of Eden has well established port service providers including harbour tugs, launch services, stevedores, marine engineers and ships chandlers and remains a major marine fishing port, even after industry adjustment and closure of the fish cannery. Sydney Ports Corporation is assuming operational management of the Port from NSW Maritime.

While currently servicing a number of oil and gas field supply and support vessels, the expansion of the Bass Strait fields eastward will push the Port of Eden into strategic and logistic prominence as it becomes substantially closer than the Victorian ports. 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.

NSW Lands in conjunction with Bega Valley Shire Council has prepared a suite of concept design and feasibility studies for the extension of the breakwater wharf, wave attenuator and freight route proposed to develop the Port, concluding in a presentation of a business case to Infrastructure Australia, Sydney Ports and NSW Maritime for investment between federal, state and local government.

Eden provides safe harbour to ocean racing vessels. Limited research indicates the scale and frequency of racing between NSW ports into Victoria and Tasmania would increase with the benefit of safe harbour and berthing facilities at Eden.

While a smaller private marina off Cattle Bay is understood to be under consideration, a more substantial marina protected by the attenuator may attract private capital investment with associated tourism facilities landside.
Acknowledgements

This Strategic Regional Plan was developed by Regional Development Australia - Far South Coast NSW and involved extensive community and stakeholder consultation.

The following people are particularly acknowledged for their contribution to the document.

**Regional Development Australia – Far South Coast NSW Committee**

- **Rob Pollock OAM**  RDA Far South Coast Chair and Eurobodalla Shire Council Councillor
- **John Lamont**  RDA Far South Coast Deputy Chair and Managing Director, Nowra Chemicals
- **Russ Pigg**  RDA Far South Coast Committee Member and Shoalhaven City Council General Manager
- **Paul Anderson**  RDA Far South Coast Committee Member, Gosford City Council General Manager and former Eurobodalla Shire Council General Manager
- **Peter Tegart**  RDA Far South Coast Committee Member and former Bega Valley Shire Council General Manager
- **Gary Smith**  RDA Far South Coast Committee Member and Education Sub-Committee Chair; Coordinator of TeenSafe
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- **Russell Fitzpatrick**  RDA Far South Coast Committee Member and Bega Valley Shire Deputy Mayor
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- **Claire Short**  Administration Officer

**Other:**

- **Gail Stevens**  Former RDA Far South Coast Committee Member

*Regional Development Australia - Far South Coast Strategic Regional Plan 2013-2018*
## 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 RDA Far South Coast NSW Strategic Regional Plan.

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- RDA Far South Coast  RDA FSC Equine Industry Scoping Report  2012
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• Community development
• Environmental sustainability