

## Bega Valley Area Profile



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|-----------------------|--|
| <b>Population:</b>    | 34,200 persons (2016 population)                                     |
| <b>Growth Rate:</b>   | 3.17% (2011-2016) 0.48% average annual growth                        |
| <b>Key Industry:</b>  | Tourism, Retail, Health Care and Social Assistance and Manufacturing |
| <b>Urban Centres:</b> | 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 square km of land. Three quarters of the Shire is National Park lands or State Forest.

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

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

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

### People & Community

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

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

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

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

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

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

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

### **Population Projections**

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

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

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

### **Workforce**

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

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

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

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

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

### **Income**

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

## Economy, Industry & Business

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

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

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

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

| INDUSTRY                                  | BEGA VALLEY | REGIONAL NSW |
|---|-------------|--------------|
| Health Care & Social Assistance           | 13.1%       | 13.0%        |
| Retail Trade                              | 12.3%       | 11.4%        |
| Tourism                                   | 11.1%       | 7.7%         |
| Manufacturing                             | 9.3%        | 8.3%         |
| Construction                              | 8.7%        | 7.9%         |
| Education & Training                      | 7.7%        | 8.6%         |
| Agriculture, Forestry & Fishing           | 6.6%        | 5.8%         |
| Public Administration & Safety            | 5.2%        | 7.2%         |
| Professional, Scientific & Tech. Services | 4.3%        | 4.6%         |
| Transport, Postal & Warehousing           | 4.1%        | 4.2%         |
| Other Services                            | 3.4%        | 3.9%         |
| Wholesale Trade                           | 2.8%        | 2.8%         |
| Administrative & Support Services         | 2.6%        | 2.8%         |
| Inadequately described or not stated      | 2.1%        | 2.1%         |
| Financial & Insurance Services            | 1.5%        | 2.2%         |
| Arts & Recreation Services                | 1.5%        | 1.2%         |

|  |      |      |
|--|------|------|
| Rental, Hiring & Real Estate Services  | 1.4% | 1.4% |
| Electricity Gas Water & Waste Services | 1.1% | 1.5% |
| Info. Media & Telecommunications       | 0.8% | 1.0% |
| Mining                                 | 0.2% | 2.5% |

### **Agriculture, Forestry & Fishing**

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

### **Tourism**

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

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

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

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

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

### **Property**

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

### **Education**

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

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

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

There are Registered Training Organisations including a community college.

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

### **Infrastructure**

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

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

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

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

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

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

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

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

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