

## Regional Overview



**Population:** 172,650 persons (2016 est. resident population)  
 Growth Rate: 3.74% (2011 – 2016) 0.51% average annual growth

### Key Industries:

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

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

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

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

### Location & Environment

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

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

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

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

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

### **People & Community**

The estimated resident population of the FSC as at 30 June 2016 was 172,500 persons. More than half of these were in the Shoalhaven (99,800).

The population has increased by 3.74% over the last five years and currently has a density of around 14.9 people per square kilometre (average of Shoalhaven and South Coast).

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

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

Persons living alone account for 26.0% of households.

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

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

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

### **Population Projections**

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

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

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

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

### Workforce

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

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

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

### Income

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

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

### Economy, Industry & Business

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

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

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

INDUSTRY	FSC	REGIONAL NSW
Health Care & Social Assistance	13.9%	13.0%
Retail Trade	13.1%	11.4%
Tourism	10.1%	7.7%
Construction	9.4%	7.9%
Public Administration & Safety	8.4%	7.2%
Education & Training	7.9%	8.6%
Manufacturing	7.6%	8.3%
Professional, Scientific & Tech. Services	4.4%	4.6%
Other Services	3.8%	3.9%
Transport, Postal & Warehousing	3.7%	4.2%
Agriculture, Forestry & Fishing	3.2%	5.8%
Administrative & Support Services	3.1%	2.8%
Wholesale Trade	2.2%	2.8%
Inadequately described or not stated	2.0%	2.1%

Rental, Hiring & Real Estate Services	1.7%	1.4%
Arts & Recreation Services	1.6%	2.1%
Financial & Insurance Services	1.6%	2.2%
Info. Media & Telecommunications	1.1%	1.0%
Electricity Gas Water & Waste Services	1.1%	1.5%
Mining	0.3%	2.5%

### **Manufacturing**

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

### **Defence**

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

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

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

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

### **Agriculture**

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

### **Education**

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

construction at the West Nowra campus.

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

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

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

Education and training employ 7.9% of the regions workforce.

### **Tourism**

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

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

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

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

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

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

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

### **Property**

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

### **Infrastructure**

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

increasing capacity for smaller recreational vessels and the local fishing fleet.

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

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

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

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

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