

## Shoalhaven Area Profile



**Population:** 99,800 persons (2016 population NSW Planning)

**Growth Rate:** 3.74% (2011-2016) 0.59% average 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 99,800 at 30 June 2016, indicating the population grew by 3.74% over the preceding four years. (NSW Planning & Environment)

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

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

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

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

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

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

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

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

### **Population Projections**

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

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

The median age is predicted to rise to 53 years.

### **Workforce**

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

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

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

### **Income**

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

### **Economy, Industry & Business**

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

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

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

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

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

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

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

INDUSTRY	SHOALHAVEN	REGIONAL NSW
Health Care & Social Assistance	14.1%	13.0%
Retail Trade	12.8%	11.4%
Public Administration & Safety	10.3%	7.2%
Tourism	9.4%	7.7%
Construction	9.3%	7.9%
Manufacturing	7.9%	8.3%
Education & Training	7.7%	8.6%
Professional, Scientific & Tech. Services	4.4%	4.6%
Other Services	3.7%	4.2%
Transport, Postal & Warehousing	3.7%	4.7%
Administrative & Support Services	3.1%	2.8%
Agriculture, Forestry & Fishing	2.0%	5.8%

Wholesale Trade	2.0%	2.8%
Inadequately described or not stated	1.9%	2.1%
Rental, Hiring & Real Estate Services	1.7%	1.4%
Arts & Recreation Services	1.7%	1.2%
Financial & Insurance Services	1.6%	2.2%
Electricity Gas Water & Waste Services	1.1%	1.5%
Info. Media & Telecommunications	1.0%	1.0%
Mining	0.4%	2.5%

### **Manufacturing**

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

### **Agriculture**

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

### **Defence**

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

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

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

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

### **Education**

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

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

There are also community colleges located at Bomaderry and Ulladulla.

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

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

### **Tourism**

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

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

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

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

### **Property**

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

### **Infrastructure**

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

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

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

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