



Economic Development Strategy 2019-28

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Mayor's message



I present to you Eurobodalla Shire Council's Economic Development Strategy 2019-28 Advancing Eurobodalla.

Our business and industry sector is smart, innovative, and resilient and is supported and prepared for future growth and challenges. This comprehensive 10-year Strategy will help guide Council as we strive to create a more vibrant and diverse economy.

It has been developed over a period of time and through an analysis of Eurobodalla's economic positioning in collaboration with stakeholders and industry.

This Strategy highlights a range of issues, challenges and opportunities for sustainable economic development in the Eurobodalla. The Strategy focuses on four key priorities:

1. Industry Assistance and Engagement
2. Investment Attraction
3. Workforce Development
4. Infrastructure and Place Enhancement.

Advancing Eurobodalla builds on Council's ongoing commitment to diversifying the region's economy, attracting investment, supporting our business community and ensuring responsive services and infrastructure, making Eurobodalla a dynamic location to live, work and invest.

Cllr Liz Innes

Eurobodalla Mayor

Acknowledgement of Country

Eurobodalla Shire Council recognises
Aboriginal people as the original inhabitants
and custodians of all land and water in the
Eurobodalla and respects their enduring cultural
and spiritual connection to it.



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Executive Summary

Planning for economic growth in Eurobodalla over the next 10 years will focus on strengthening the qualities that attract people to visit, invest and live in the area: high-quality tourism and recreation opportunities, small-scale agriculture, food and rural tourism, and heritage, cultural and natural experiences.

Tourism is and will continue to be the driving force of the Eurobodalla economy. The health care and social assistance sector is also important for Eurobodalla in terms of both employment and the services it provides to the community. The education and training sector will need to grow and adapt to ensure the workforce has the required skills as the economy grows.

The internet and telecommunications technologies, particularly reliable and fast broadband, are critically important in laying the foundations for a more diverse economy for Eurobodalla, for two key reasons. Firstly, to assist in leveraging existing sectors and businesses such as tourism and its marketing and systems. Secondly, as a foundation for future business development in such areas as professional services, new media and creative production.

There will need to be a continued focus on advocating for key infrastructure improvements and major developments that can be a catalyst for economic growth.

In planning for and facilitating economic growth, we need to ensure the right kind of growth and development for Eurobodalla that reinforces and supports our values and capitalises on our strengths and advantages.

Eurobodalla Shire Council's Fit for the Future Improvement Plan, adopted by Council on 23 June 2015, included a key action to support economic growth and development through a new Integrated Economic Growth and Development Strategy.

This Strategy, called Advancing Eurobodalla, outlines how Eurobodalla can secure the right kind of economic growth and who can play a role in achieving this. It has been developed having regard to the best available evidence in terms of economic indicators, the views and ideas of local stakeholders, and the values that have been regularly expressed by the broader Eurobodalla community. Best practice international economic and community development has also been taken into account in the development of the strategy.

The Strategy includes an Action Plan containing strategies and actions that focus on major initiatives to stimulate economic growth. This strategy delivers a plan to Advance the economy of Eurobodalla Shire over the next 10 years and contribute to the Community's vision, "We will be friendly, responsible, thriving and proud". For a complete picture on the shire's biggest industry, tourism, the reader should also consult the Eurobodalla Destination Action Plan.



We have lots of potential!

- Pristine natural environment that is loved by residents and visitors alike.
- Over \$1 billion earmarked for investment over the next three years:
 - The NSW Government has committed \$2.4b to the duplication of the Princes Hwy including commitment to duplication to the Victorian border over a sustained period
 - Bi-partisan federal support for \$500m for the upgrade of the Princes Hwy
 - \$300m in new bridges and establishment of pre-cast yard at Mogo for major bridge construction work at Batemans Bay
 - \$150m committed by NSW Government for new regional hospital.
- Proximity to major population centres in Canberra and Sydney.
- High-quality agricultural land and a vibrant agriculture and food sector.

Competitive advantages:

- Diversifying agricultural base and a growing reputation for quality seafood, dairy, vegetables
- Natural environment and temperate climate
- Water quantity and quality
- Forest, coast, beaches, National Parks
- Proximity to Canberra and Sydney
- Rich heritage and history
- Aboriginal cultural heritage
- Strong tourism industry
- Several growing industry sectors
- Stable passenger air transport





Solution: more local jobs!

Key Challenges

- Eurobodalla has the highest aged dependency ratio in NSW and sixth highest in Australia.
- Eurobodalla's workforce and training participation rate is one of the lowest in the country.
- Eurobodalla has one of the lowest skilled workforces in the country.
- Eurobodalla has one of the highest unemployment rates in Australia.
- We also have one of the highest welfare dependencies in the country.
- Nearly 80% of land is State Forest and National Parks.
- SEIFA Index of Disadvantage for Eurobodalla Shire in 2016 was 962.
(Considered a low SEIFA index
- indicates relatively greater disadvantage)

How can more jobs be created?

- Support diversification in tourism to offer new experiences to our growing visitor markets outside of peak tourist seasons.
- Meet the demands of the health care and social assistance sector. Important for Eurobodalla in terms of both employment and servicing of our community.
- Together with Government, industry and local Chambers, support business to help build capacity, access infrastructure funding and assist with advocacy.
- Help our local producers grow the food industry including food tourism, regional food branding and promotion and distribution.
- Grow the education and training sector to ensure the workforce has the required skills to support economic growth.
- Continue to lobby for reliable telecommunications, particularly reliable and fast broadband for all businesses.
- Continue advocating for key infrastructure improvements and major developments that can be a catalyst for jobs and economic growth.

Introduction and Background

Eurobodalla Shire Council's Fit for the Future Improvement Plan, adopted by Council on 23 June 2015, included a key action to support economic growth and development through a new Economic Development Strategy 2019-2028. This Strategy, called Advancing Eurobodalla, outlines how Eurobodalla can secure the right kind of economic growth and who needs to play a role in achieving this. It has been developed having regard to the best available evidence in terms of economic indicators, the views and ideas of local stakeholders, and the values that have been regularly expressed by the broader Eurobodalla community. The Economic Development Strategy (the Strategy) provides a framework to promote and facilitate sustainable economic growth and development in the Eurobodalla local government area.

The Strategy is based on an analysis of current economic climate in Eurobodalla, the existing strategic policy context at the national, state and local level, and the drivers of future economic growth. The overall goal of the Strategy is to grow the economy in order to improve the socio-economic wellbeing of the community. Successful implementation of the strategies and actions in the Action Plan, which has been designed to shape the efforts of Council, governments, businesses and the community, will help the community achieve sustainable economic growth. The Strategy includes a process for monitoring and measuring progress of the Action Plan.

The Strategy comprises:

- the main strategic documents including background analysis
- the Action Plan.

At a practical, operational level the Strategy:

- focuses on opportunities to generate additional income and jobs, while preserving and enhancing the local features that are valued by the community and which underpin our economy
- encourages economic outcomes compatible with local aspirations, needs, values and resources
- involves collaboration and partnership between the public, private and community sectors
- fosters a more resilient and diversified local economy, and
- is a strategic companion to the Eurobodalla Destination Action Plan.



Integrated planning and reporting framework



Role of Local Government

Council's role in economic development is that of a facilitator rather than an outright driver of economic development. The key roles are delivering core functions, such as:

- Visioning, planning and enabling
- Delivery of and advocating for infrastructure to support sustainable population growth
- Enhancing amenity, including streetscapes, town entrances and community facilities
- Visitor, resident and investment attraction through destination management, development and marketing, visitor services and relationship building
- Facilitating links between education and training providers and industries to support skills development and employment opportunities
- Advocating for the business community on issues such as compliance costs, payroll tax, public jobs relocations, education and health funding, regional tourism and transport issues
- Actively promoting, coordinating and marketing the economic opportunities of the area
- Collecting and distributing economic and business information and facilitating access to business support.
- Collaborating with regional development organisations such as Canberra Region Joint Organisation (CRJO) to support regional growth initiatives.



Eurobodalla Economic Context

Eurobodalla's economy, originally built on dairying, forestry and fishing, is now more diverse and is based around tourism, healthcare, agriculture and construction. Opposite is a snapshot of Eurobodalla's economy. See the Appendix for more detailed background analysis.

The Eurobodalla Shire has a population of 38,000, which is very slowly growing and ageing very quickly (relative to the State and Nation). These demographic trends are reflective of the local economy, which has historically not grown at a pace to provide sufficient jobs for the local population, which forces many young families to leave the area. At the same time, the area's amenity has attracted retirees, which combined with the lack of jobs growth, has rapidly accelerated the ageing of the population.

The Shire is unique as 37% of ratepayers are not residents, meaning that these ratepayers live somewhere else (mostly in Canberra) while maintaining a residence in the Shire. With 37% of households not living locally, the shire misses out on the local expenditure that these households would usually make in the economy if they lived here, as well as the important contribution they would make to the community in terms of schools, clubs and other volunteer organisations. With this many non-resident ratepayers, the shire is missing out.

The economy is structured around tourism, healthcare and construction. The economy is very reliant upon these industries and with the inherent volatility that can be experienced in tourism and construction, the economy is very vulnerable to changes in these industries. Tourism alone supports 1,881 total jobs (13% of total) in the community and represents 14% of Gross Regional Product, which is double the proportion of tourism jobs at a State level and two-and-a-half times tourism's economic contribution to the State.

On a positive note, over the next few years, State and Federal Government along with some private investors will be spending over \$1 billion on infrastructure investment in the Shire. There is 38,000 ha of agricultural land in the Shire and the major population centres (and consumer markets) of Sydney and Canberra are within reach. The region has a strong foundation in agriculture, tourism, healthcare and a burgeoning creative industries scene. Housing is affordable and attractive to families. Advancing Eurobodalla seeks to leverage the natural competitive advantages of the region to foster greater economic diversification and to drive job growth.

Unemployment in the Shire is the sixth highest in NSW (10%) and is consistently well above the State average. The Shire also has high proportion of welfare dependent residents (both old and young) including pensioners, people on disability support and household incomes are 36% below the State average.

Unchecked these current trends will continue to form and shape the community. In 20 years' time, two out of every three residents will be 55+, there will be no growth in the schools, community organisations and sporting clubs will suffer and decline. A greater balance in the future is required. Through Advancing Eurobodalla, the future can change. Great economic diversification is needed to drive value in job creation, which will help to encourage residential relocation to the Shire. The end result will be a more balanced economy and community.

Fast facts



	Eurobodalla	NSW
Population (2017):	38,117	
Population Growth (2017):	0.4%	1.6%
Land area:	3,427 km ²	
Median age (2016):	54	38
Median weekly household inc (2016):	\$946	\$1,482
Median weekly mortgage repay (2016):	\$320	\$458
Median weekly rent (2016):	\$265	\$380
Gross Regional Product (2018):	\$1.45B	
Growth in Gross Regional Product (2018):	-0.2%	2.6%
Number of local businesses (2017):	2,832	
Number of employed residents (Sept 2018):	14,224	
Unemployment rate (Dec 2018):	10%	4.7%
SEIFA Index of Disadvantage (2016)	962	
Aboriginal and Torres Strait Islander pop (2016):	5.6%	2.9%

Figure 1 Eurobodalla Population

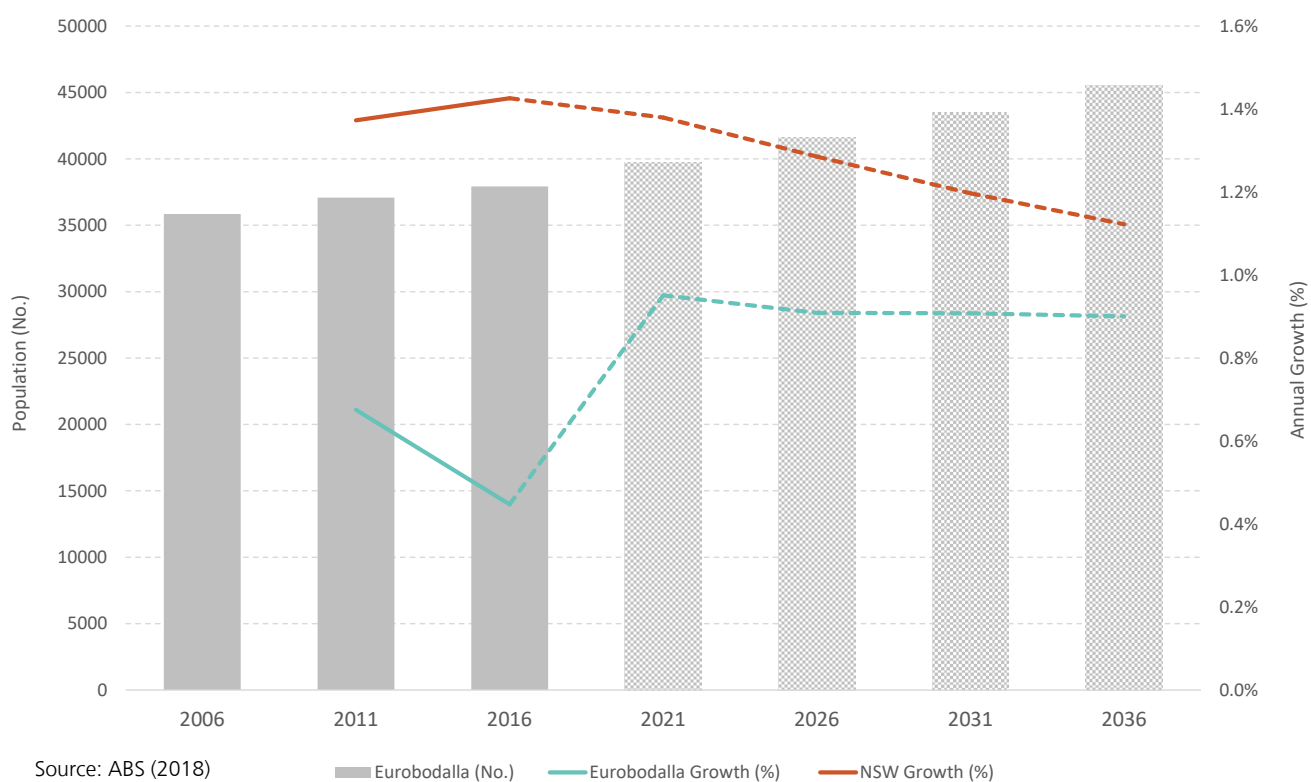


Figure 2 Eurobodalla GRP

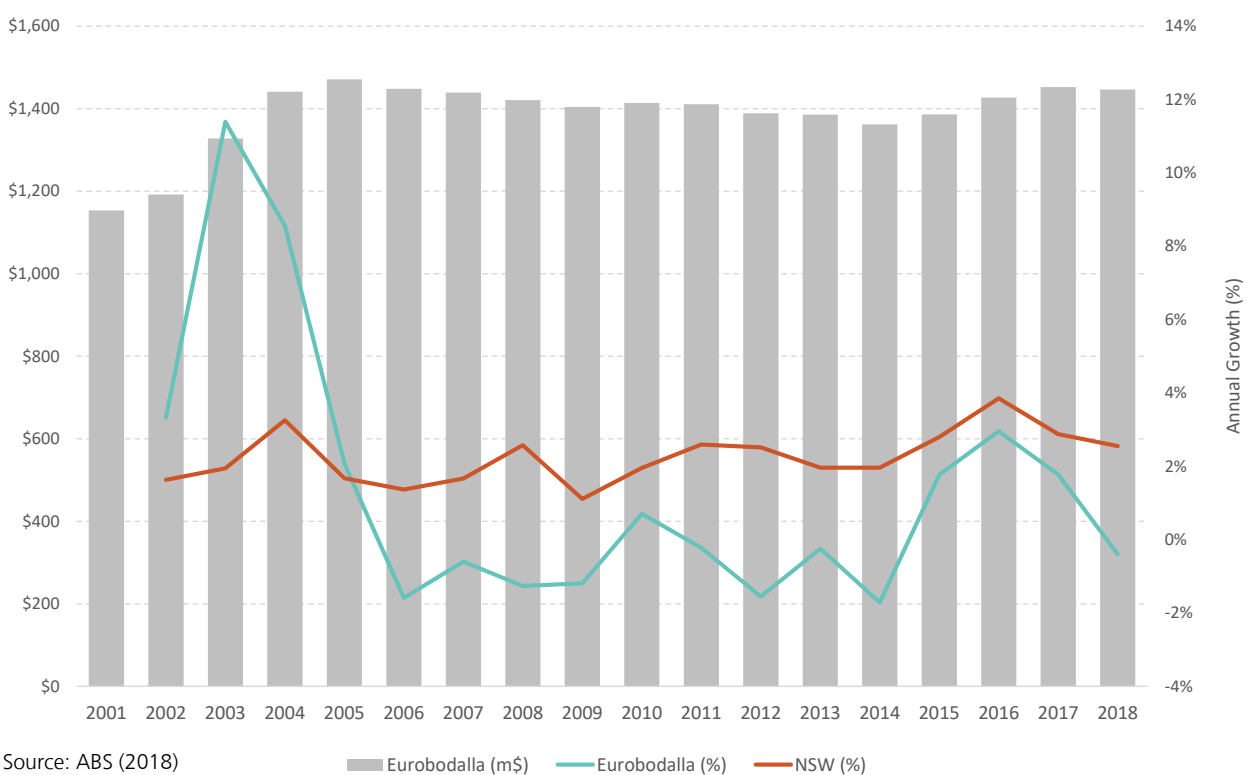


Figure 3 Eurobodalla median age compared to NSW

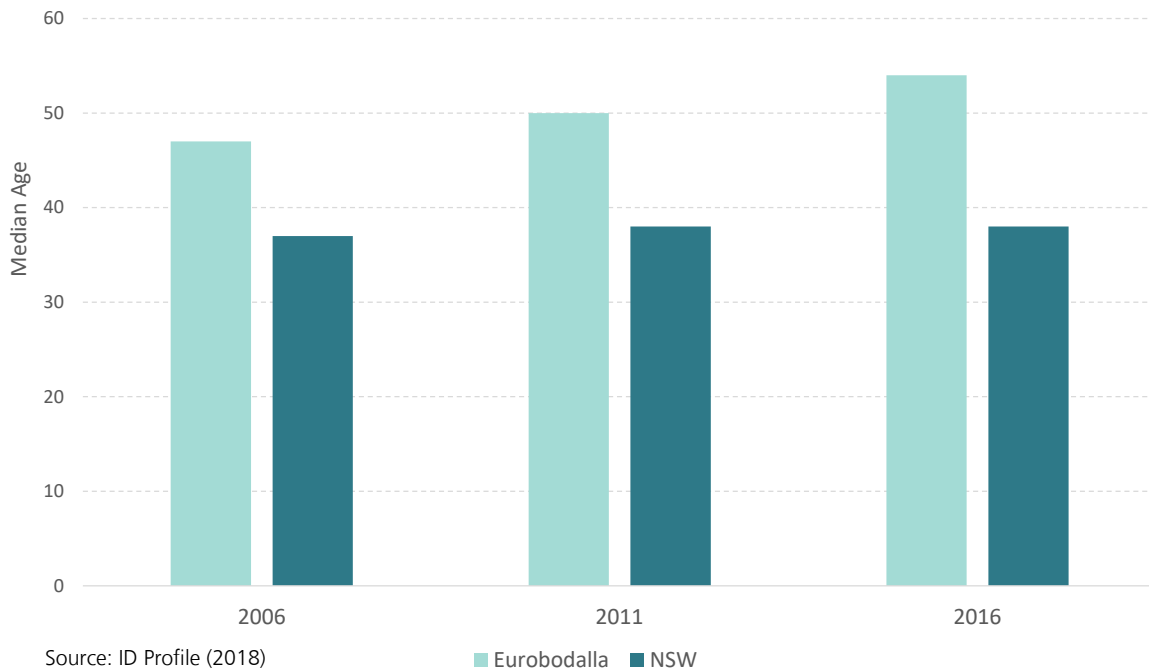
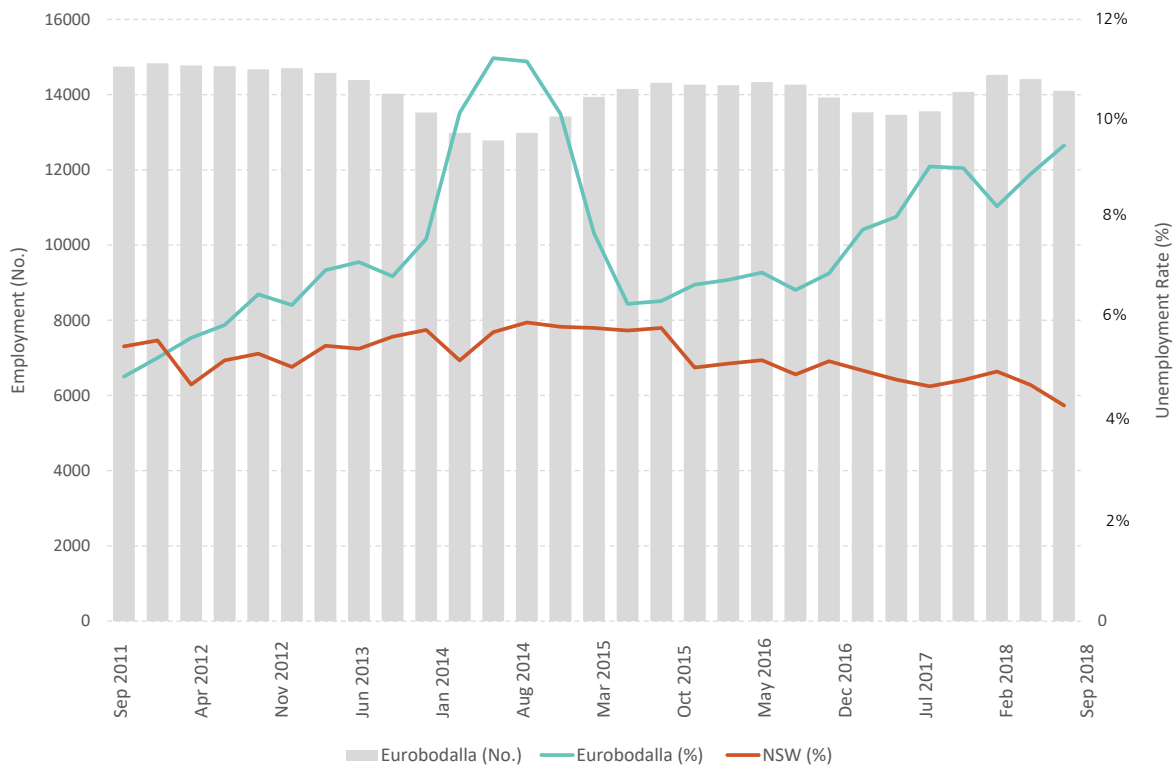


Figure 4 Eurobodalla employment data



Source: Department of
Jobs and Small Business (2018)

**Figure 5 Eurobodalla Industry Mix
(% Contribution of Industry)**

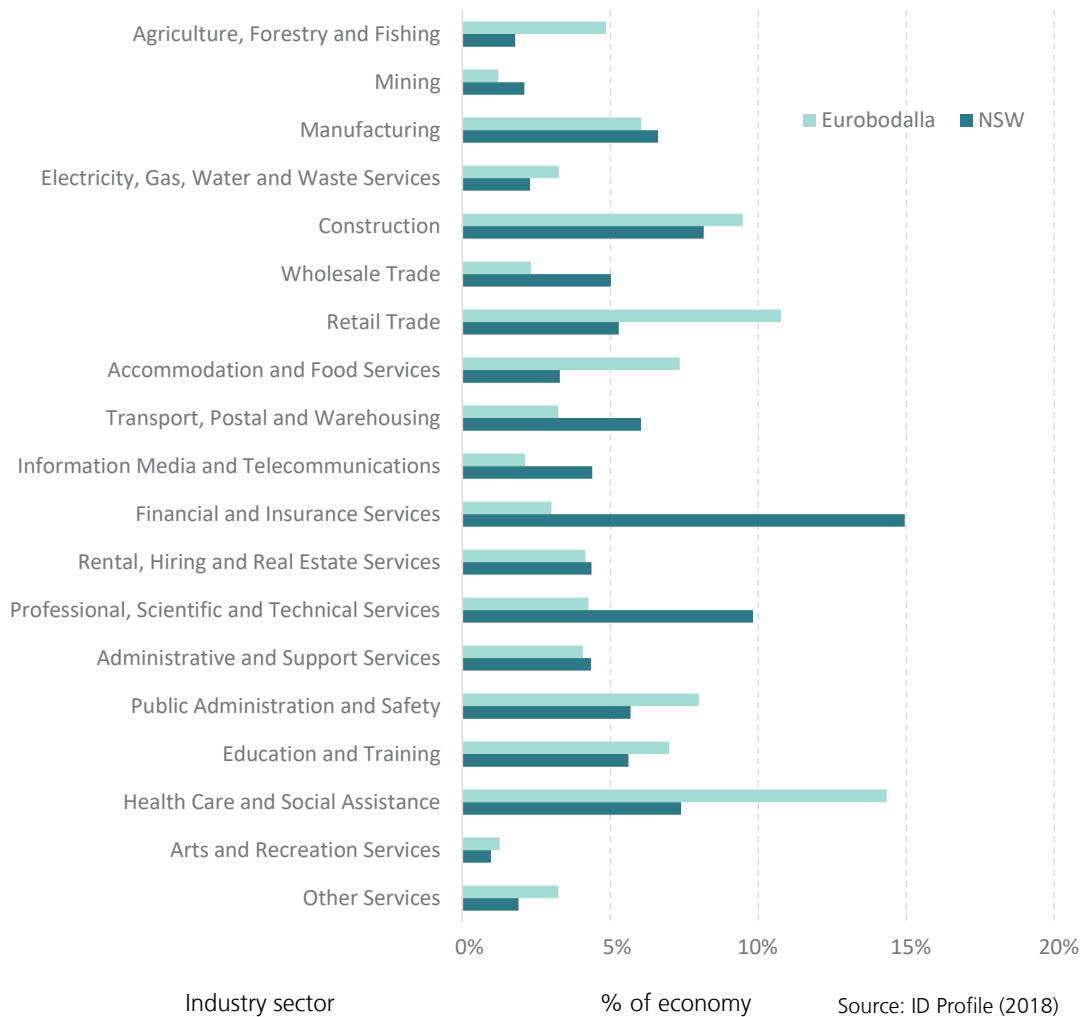
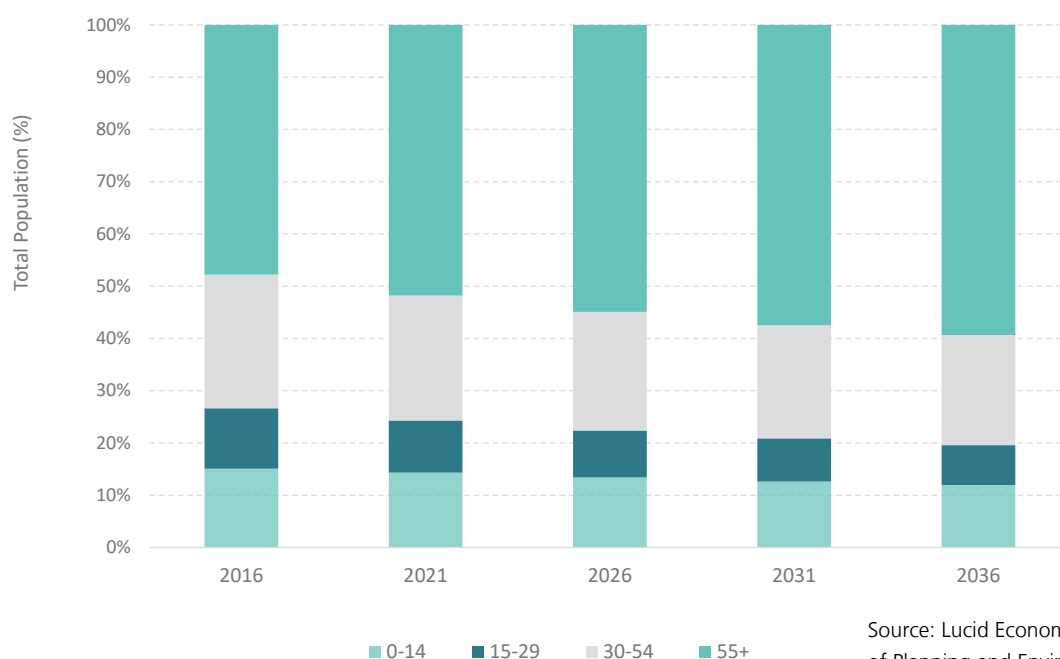


Figure 6 Eurobodalla Future Demographic Structure (by Age)





Stakeholder Consultation Outcomes

In the development of this Strategy, key stakeholders have been engaged through one-on-one interviews and through facilitated workshops.

Stakeholders from Australian and NSW Government agencies, the health and aged care, education, retail, construction, manufacturing and agricultural sectors and those in tourism industries were asked to identify their objectives for economic growth, what they think is working well and what further actions are needed. The common themes that emerged were:

Objectives:

- set out a clear vision for economic growth in Eurobodalla
- foster business and employment growth
- foster links between businesses, industry sectors and the public and private sectors

What is working well?

- good examples of intra and inter industry collaboration
- good approach to tourism promotion
- growth in value of small-scale agriculture
- growing diversification of businesses

What further actions are needed?

- more and better collaboration across sectors
- more research and evidence-based initiatives
- focus on infrastructure that supports business and tourism
- development of strong business cases to support investment
- support for more small-scale agriculture, and arts and cultural facilities

The Strategy has been prepared considering all of the above points and other views expressed by stakeholders during the initial consultation phase. In addition, the latest available economic evidence has been considered and research into successful economic and community development plans and practices from around Australia and internationally has been undertaken.

The feedback received during the 2017 exhibition has informed this final document including economic analysis, measurable and relevant actions and a clear direction.



Our Competitive Advantages and Growth Opportunities

In order to ADVANCE our economy, we will leverage our competitive advantages and focus on key growth opportunities that will build on our strengths and help us to grow and diversify.

Competitive advantages:

- Diversifying agricultural base and a growing reputation for quality seafood, dairy, vegetables
- Natural environment and temperate climate
- Water quantity and quality
- Forest, coast, beaches, National Parks
- Proximity to Canberra and Sydney
- Rich heritage and history
- Aboriginal cultural heritage
- Strong tourism industry
- Several growing industry sectors
- Track record of growth
- Stable passenger air transport

Eurobodalla's natural assets

- Unspoilt beaches and waterways
- Clean water and air
- Significant areas of vegetation
- Batemans Marine Park
- Heritage towns and villages
- Productive agricultural lands

Agriculture and food

(including aquaculture)

Contribution to GRP:

\$58.6m

Number of businesses:

254

Persons employed:

683

Tourism

(including accommodation,
food services, tours,
attractions and experiences)

Contribution to GRP:

\$83.2m

Number of businesses:

364

Persons employed:

1,182 (direct)

Health care and social assistance

(including aged care)

Contribution to GRP:

\$156.1m

Number of businesses:

154

Persons employed:

2,543

Education and training

Contribution to GRP:

\$75.1m

Number of businesses:

38

Persons employed:

1,236

Creative industries

Contribution to GRP:

\$29.4

Persons employed:

320

S.W.O.T Analysis

An analysis of Eurobodalla's strengths and weaknesses have highlighted where focus should be applied.	
Strengths	Weaknesses
<ul style="list-style-type: none"> Natural environment and temperate climate Water quantity and quality Forest, Coast, Beaches, National Parks Proximity to Canberra and Sydney Rich heritage and history Aboriginal cultural heritage Strong tourism industry Several growing industry sectors Stable passenger air transport Council's Open for Business philosophy Proactive leadership Eurobodalla Regional Hospital 	<ul style="list-style-type: none"> Low employment by population High level of low fixed income (welfare and pensioners) Limited provision of education/training Underemployment (high part-time, casual employment) Distance and lack of public transport Lower socio-economic residents restrict local consumption > 30% dwellings unoccupied High 'aged dependency ratio' – the percentage of people over 65 as a proportion of those of working age High dependence on tourism Small volatile economy, low GRP/capita Low SEIFA index (indicates relatively greater disadvantage)
Opportunities	Threats
<ul style="list-style-type: none"> Diversify tourist base with more segments Improve public transport and Princes Hwy B-double access Grow construction, manufacturing and food sector Increase government funding for tourism infrastructure Large vacant housing stock Start-ups and innovation hub development Leverage growth in health, aged care Employment/training programs for long term unemployed Improve tourism/shire brand recognition Growth of creative arts industries Diversify and grow agricultural base and a growing reputation for quality seafood, dairy, vegetables Provision of new Local Environment Plan Leverage our retirees and volunteers Training opportunities associated with infrastructure, health and emergency services Regional Integrated Emergency Services Precinct Moruya 	<ul style="list-style-type: none"> Structural shifts in construction and manufacturing Housing affordability and availability Slower population growth and shrinking workforce Large section of the pop in 16-65 dependent/not avl to work Working age population disengaged Loss of prime age people Difficulty finding staff (skilled and willing) Declining employment Limited inward migration Loss of businesses Increasing high unemployment



The Strategy proposes the following vision for a productive and prosperous Eurobodalla:

To foster economic growth and improve the socio-economic wellbeing of the community by taking advantage of our valued natural assets to build a vibrant and diverse economy.

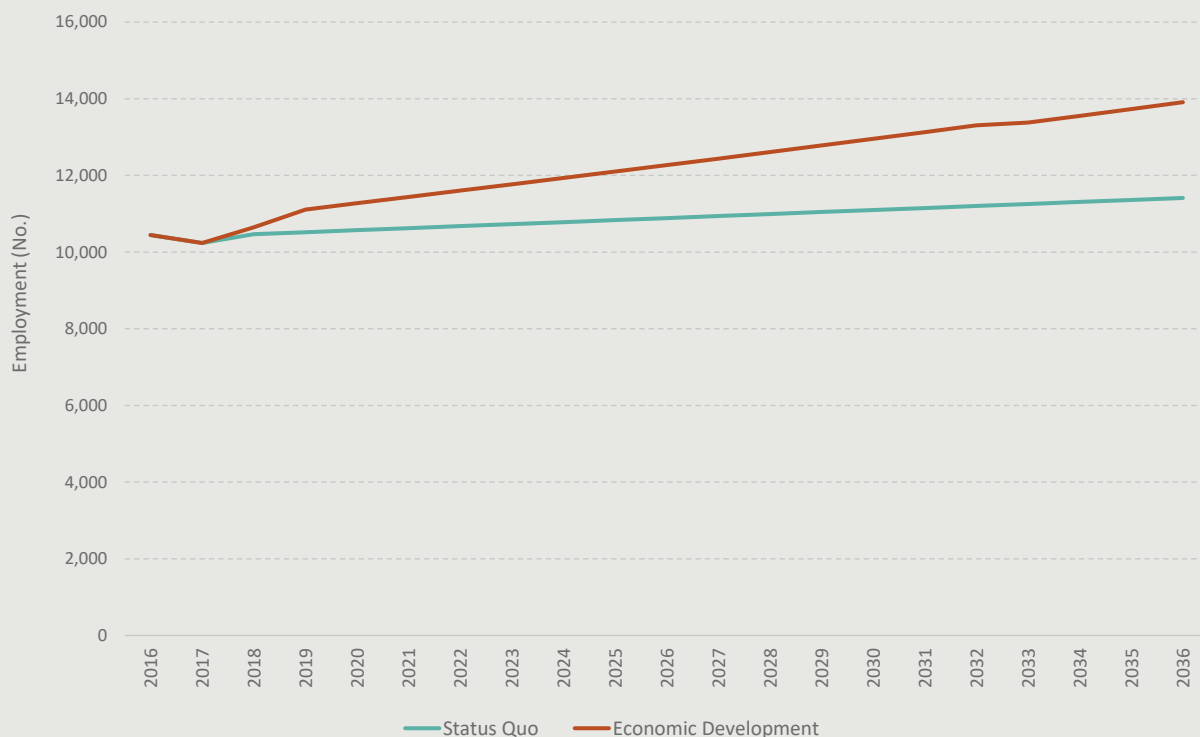
Achieving this vision will ensure that our community **THRIVES!**

What does success look like?

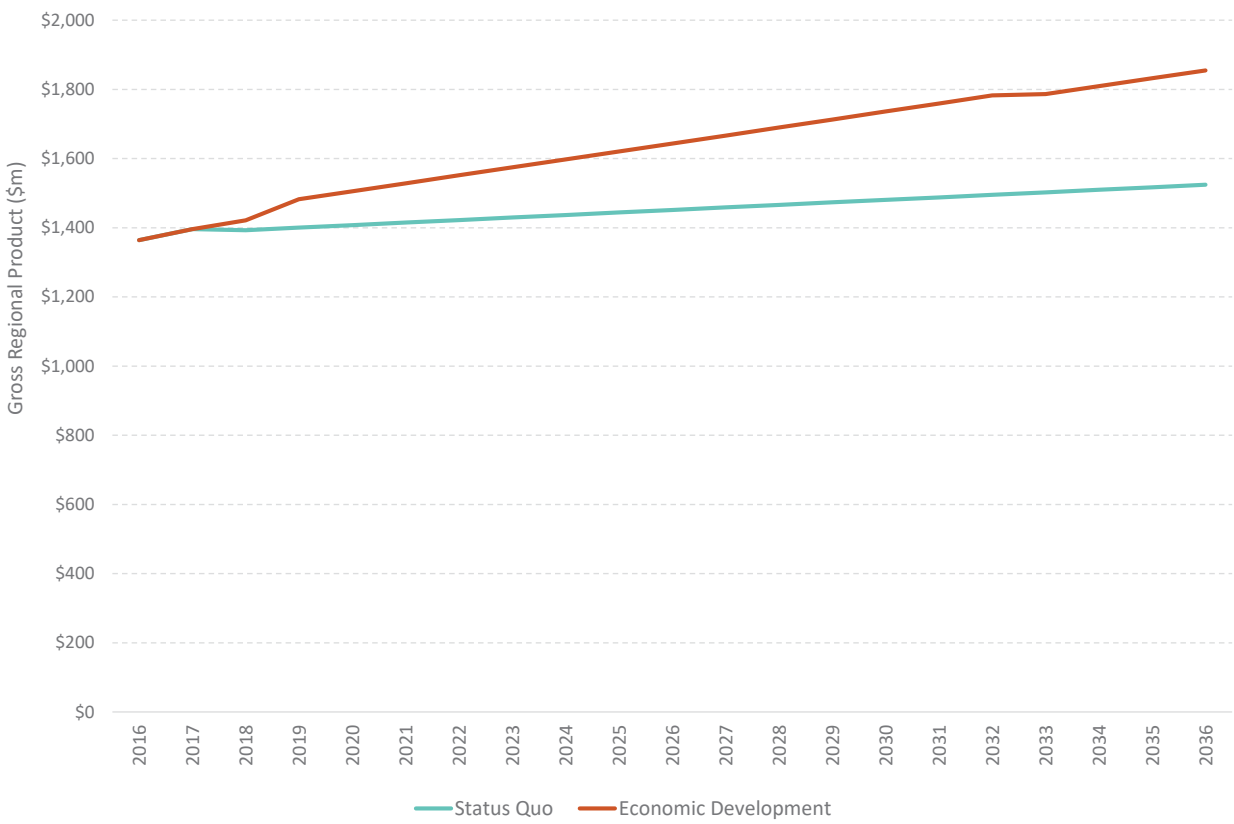
Future Employment Scenarios

- By 2036, our economy will be stronger and more diverse, including an additional 2,500 jobs and \$330 million in Gross Regional Product. These new jobs will bring new households and families that will help to rebalance our demography.

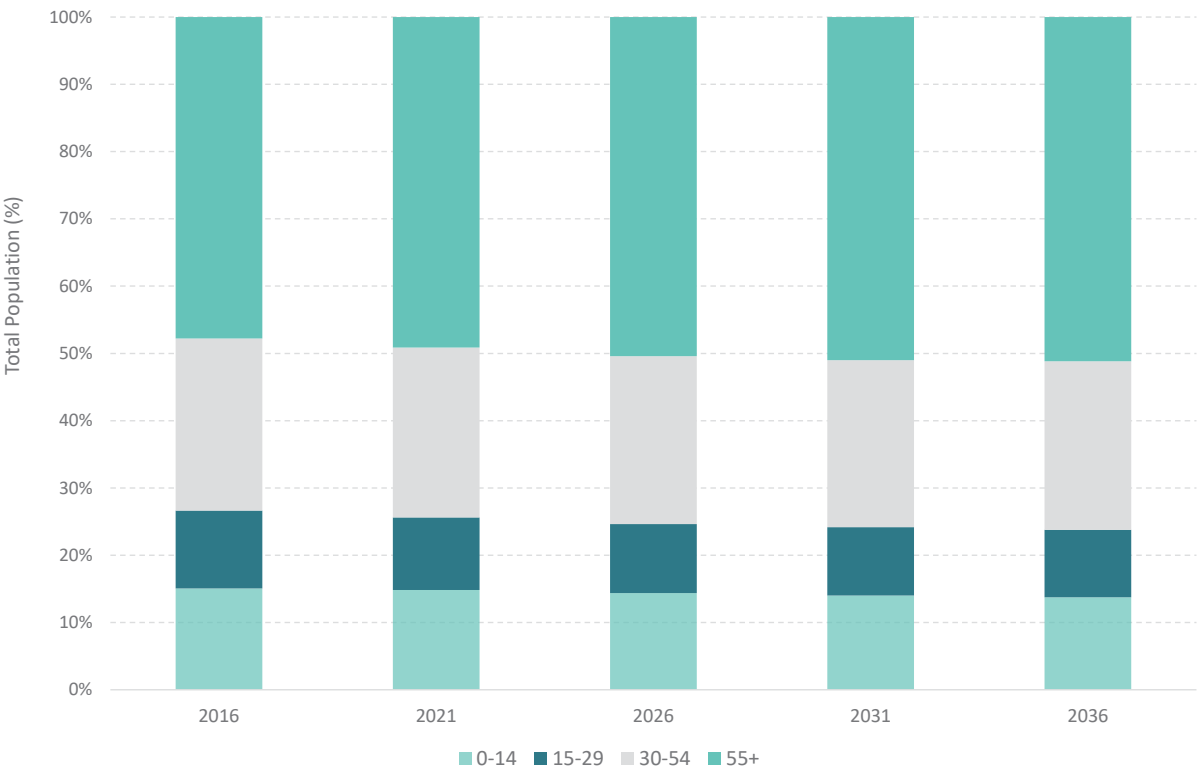
Future Eurobodalla Employment (No.)



Future Eurobodalla Economy, GRP (\$m)



Potential Future Population, by Age Scenario



Overall Strategy

Advancing Eurobodalla provides a clear pathway towards our new economy and achieving our vision. It provides strong overall direction regarding how we will seek to influence and grow our local economy.

OUR VISION: To foster economic growth and improve the socio-economic wellbeing of the community by taking advantage of our valued natural assets to build a vibrant economy.

New economy

Thriving
Diversified and growing
Balanced and Engaged
Workforce

Advancing Eurobodalla

1. Industry Assistance and Engagement
2. Investment Attraction
3. Workforce Development
4. Infrastructure and Place Enhancement

Old economy

Stagnant
Reliant on tourism
Aged dependant community
High unemployment and welfare dependency

Community Strategic Plan

5. Vibrant and diverse economy

- 5.1 Diversify the region's economy, attract investment and target new and emerging employment sectors
- 5.2 Support our business community to grow and adapt and assist in building capacity
- 5.3 Focus on the development of sustainable tourism, events and visitor experiences
- 5.4 Ensure businesses have access to supportive public and technology infrastructure

Key priority 1

Industry Assistance and Engagement

Summary:

Council will work collaboratively with local industry and businesses through ongoing engagement and support. Council will assist and support businesses seeking to grow through a variety of business development activities and in coordination with industry. Council will maintain data and information regarding the local economy and track business sentiment and growth. Council will work together with and support local businesses seeking grant funding from the State and Commonwealth Governments. Council will maintain a productive, on-going relationship with our local businesses so that it is well placed to support local businesses to grow.

Rationale:

Existing businesses are the heart of any economy. Assisting local businesses to grow will assist the economy to grow and create more local jobs, thus contributing to the identified vision and goals. Most of the key growth opportunities are already represented by local businesses. Through ongoing engagement with local business and industry, Council will be best placed to support these local companies to grow.



Specific Initiatives:

- Work with industry and business to build capacity
- Grow our rural food producers and aquaculture industries
- Disseminate and deliver economic information



Key priority 2

Investment Attraction

Summary:

Council will proactively market the area as a place of business and investment, promoting its various competitive advantages and key growth opportunities. Beyond this promotion, Council will work hard to facilitate and encourage employment and investment outcomes using the various mechanisms in its control, namely the planning system, infrastructure provision and other services. Beyond promoting and encouraging investment, Council has a responsibility to ensure that there are sufficient employment lands and other commercial/retail land that can accommodate future growth in an efficient and affordable manner.

Rationale:

Attracting new businesses, jobs and residents is pivotal for economic growth of the region. Seeking new investment into the region from outside will stimulate the economy in numerous ways, creating new jobs, building greater local industry capability as well as supporting local supply chains and triggering technology transfer. Investment into the key identified growth areas will assist the local economy to grow faster, sooner, providing a stimulus for new job creation and encouraging new residential relocation to the area. While Council cannot dictate or participate in commercial decisions with potential investors, Council can influence these decisions through creating an environment that is conducive and supportive of investment.



Specific Initiatives:

- Market and promote the region for business and investment
- Facilitate employment and investment outcomes
- Ensure sufficient lands to accommodate new investment

Key priority 3

Workforce Development

Summary:

Council recognises the importance of increasing youth employment options and skills development. To this end, Council will seek to participate directly in providing career pathways and training for its own workforce needs as well as supporting other businesses to do the same. Council will also facilitate forums to connect employers, employment agencies and education providers to collaborate on projects that assist in improving employment opportunities in Eurobodalla. Maintaining regular interaction with existing businesses (Priority 1) will help to identify skills needs across the local economy, which can then be communicated to education providers. Council also recognises the importance of increasing local access to education and will advocate for the development of more localised infrastructure.

Rationale:

High unemployment, low skills base and a lack of clear career pathways (particularly for local youth) have all been identified as an issue impacting the economy, through research, analysis and consultation. Addressing these issues through workforce development will assist local residents to attain employment and participate productively in the economy. These programs will also help identify the needs of local businesses so that the local training environment is producing the workers that local businesses need.



Specific Initiatives:

- Work with education providers and business to match skills and jobs
- Support future development of educational infrastructure
- Activities to link employers and job seekers

Key priority 4

Infrastructure and Place Enhancement

Summary:

Council will support and advocate for better infrastructure for local residents, visitors and businesses, including supporting public and private sector grant applications to the State and Commonwealth Government, continue to support shopfront improvements and efforts to fill vacant shops as well as support better access to public transport. Council will also conduct a variety of initiatives to enhance town centres across the region, including supporting the night time economy.

Rationale:

Infrastructure is critical to unlocking economic potential. Ensuring there is sufficient infrastructure (transport, utilities, telecommunications, community infrastructure, etc) will be important to encouraging investment and growth as well as attracting new jobs and new residents. Each of Eurobodalla's main commercial centres are unique in their location, form, character and history. These unique qualities need to be recognised and celebrated in the way the centres continue to grow and develop and remain attractive to visitors and future residents.



Specific Initiatives:

- Ensure town centres are activated and attractive
- Support and enhance transport infrastructure
- Improve housing choice and availability

Monitoring Change

To measure whether Eurobodalla is achieving sustainable economic growth, the Strategy proposes a set of broad measures (see box below) which mark the current baseline and can be used to track future progress of the economy. Additionally, we will also track Council's performance relative to the identified action items. In such a manner, we can examine and track actions in this strategy as well as how the economy is performing.

This Strategy proposes that quarterly and yearly reports be produced to keep Council and the community updated on how the Shire is progressing towards the identified vision. While it is important to measure the progress of the economy, it should be noted that Council plays a supporting and facilitating role in economic growth and development. Council does not control the economy but seeks to influence its future development through economic development.

The following key outcomes are measurable and will be reported on and presented at Eurobodalla's Annual Economic Forum.

This Strategy proposes that quarterly and yearly reports be produced to keep Council and the community updated on how the Shire is progressing towards the identified vision.

Key outcomes	Potential measures	Sources	Frequency
Population	Annual population growth, Aged dependency, Disadvantage index	ID Profile, Census, SEIFA	Yearly
Jobs	U/E rate, employment growth	DEWR, Census, ID profile	Quarterly
Education and Training	Qualifications, skills gap surveys	Census, ID Profile	Yearly
Employment Lands	Vacant land audits	Council data	Every 3 years
Investment	Commercial Building Approvals, Value of Infrastructure projects	Building Approvals	Quarterly
Outputs	Gross Regional Product	ID Profile	Yearly
Tourism	Visitor nights and Spend	Tourism surveys, TRA data	Quarterly
Business Growth	Business Counts, Confidence survey	ABS Register	Every 2 years

Action Plan 2019-2028

1.0 Industry Assistance and Engagement

- 1.1 Work with industry and business to build capacity
- 1.2 Grow our rural food producers and aquaculture industries
- 1.3 Disseminate and deliver economic information

2.0 Investment Attraction

- 2.1 Market and promote the Shire for business and investment
- 2.2 Facilitate employment and investment outcomes
- 2.3 Ensure sufficient lands to accommodate new investment

3.0 Workforce Development

- 3.1 Work with education providers and business to match skills and jobs
- 3.2 Support future development of educational infrastructure
- 3.3 Activities to link employees and job seekers

4.0 Infrastructure and Place Enhancement

- 4.1 Ensure town centres are activated and attractive
- 4.2 Support and enhance transport infrastructure
- 4.3 Lobby for improved telecommunications

Key priority 1

Industry Engagement and Business Development



Local businesses are the cornerstone of any economy. Council's role is to assist our local businesses to access capabilities and resources to grow. We will work cooperatively with industry and our Chambers of Commerce to ensure that local businesses have the resources they need. Council will develop and promote industry engagement and business development initiatives to continue to support our local business.

Actions	Who	When	Measure
1.1 Communicate the adopted Advancing Eurobodalla; Economic Development Strategy 2019-2028 with industry and key stakeholders.	Council Industry	2019	ED Strategy communicated
1.2 Establish an appropriate forum to discuss and explore economic development matters. Council to coordinate a facilitated business forum on a yearly basis and coordinate regular action-based working group meetings involving a broad representation including the Chambers of Commerce and relevant industry representatives.	Council Industry	yearly	Annual Forum held
1.3 Identify local business needs in terms of business training. Design a capacity building program to suit business needs and promote delivery of such a program. Encourage start-ups and innovation through programs such as iAccelerate	Council Industry	2019/20	Program prepared and promoted
1.4 Continue to work with other government bodies and organisations involved in regional development. e.g. AusIndustry, Regional Development Australia, Austrade, Dept of Industry, Canberra Region Joint Organisation, TAFE, UOW and other councils and link with the business community to help deliver this Action Plan.	Council business development	ongoing	Continued support
1.5 Collect and analyse data and report on quarterly economic data for the shire. quarterly reports to include employment data, business data, construction data, Council and other business related Government activities.	Council business development	ongoing	4 updates per year
1.6 Offer ongoing assistance for businesses who seek help to develop best practice. Areas can include: seeking and applying for grant funding, liaising with State and Federal partners, assisting with Business Awards submissions / business planning.	Council business development	ongoing	30 businesses helped
1.7 Conduct a bi-annual Business Growth Survey to help inform business health and future plans of local businesses	Council Industry	bi-annual	Survey completed
1.8 Conduct a proactive, business engagement program to liaise with individual businesses on an ongoing basis.	Council Industry	yearly	200 businesses engaged

Key priority 2

Investment Attraction



Attracting new businesses, jobs and residents is pivotal for economic growth in Eurobodalla. Priority 2 looks at attracting investment in the shire both from public and private sector by promoting our natural and built assets, such as land availability, access to capital cities, transport options and well developed education and health services. The plan is to encourage diversity to the business landscape with non-seasonal, high value-add businesses providing new jobs, acting as a catalyst for families moving to the area thus helping our demographics imbalance.

Actions	Who	When	Measure
2.1 Develop and maintain a suite of marketing material and business case documentation for identified opportunities. www.investeurobodalla.com.au to be used in communication with potential investors, government and participation at targeted industry events.	Council business development	ongoing	Website up-to-date analytics
2.2 Increase the profile of business development both to Council and community with regular updates to encourage investment and support through identification and promotion of local success stories.	Council Industry	ongoing	Champions promoted
2.3 Maintain Invest Eurobodalla information fact sheets to tailor prospectuses according to investment opportunities. Relevant information includes: vacant land and properties for sale, major land releases and infrastructure development, health, education, transport options	Council business development	ongoing	Update annually
2.4 Develop a Food Production Plan as per commitment in Rural Lands Strategy Action 34 and supporting actions in the Regional Development Australia – Far South Coast Report into the Economic & Jobs Growth Potential of the Agriculture, Viticulture & Aquaculture Industries on the NSW Far South Coast 2016. The Plan will grow our rural food producers and aquaculture economy by helping to build capacity, attract investment and identify and grow local and export markets.	Council strategic	2019/20	Food Production Plan developed
2.5 Investigate options for offering incentives to encourage desirable new businesses and government departments to relocate. Develop information prospectuses to explore current government decentralization opportunities and pursue these.	Council	2019/20	Incentives developed
2.6 Actively support the Small Business Friendly Council initiatives such as the Easy-to-do-Business Development Concierge program assisting targeted industries to navigate complex approval processes and streamlining and reducing red tape.	Council planning	ongoing	Programs promoted
2.7 Participate in UOW Blue Economy study to investigate economic opportunities.	Council	2019/20	Participation
2.8 Monitor and promote vacant business premises and land availability to match new investments with existing premises and land.	Council	yearly	Updated vacancies

Key priority 3

Workforce Development



Council leads by example by providing support and opportunities for creation of local jobs for local youth. Council will continue to focus on increasing youth employment options and skills development both within Council as an organisation and in the broader community. One way is through the facilitation of forums to connect employers, employment agencies and education providers to collaborate on projects to assist in improving employment opportunities in Eurobodalla. Maintain regular interaction with existing businesses to identify skills needs.

Actions	Who	When	Measure
3.1 Council to continue to lead by example by offering traineeships, cadetships and apprenticeships to promote youth employment and encourage industry to follow suit with potential investors, government and participation at targeted industry events.	Council Industry	annually	Number of SBATs
3.2 Actively guide and support the education sector in addressing current and future demands for skills by helping identify gaps and future needs via a Business and Industry Skills shortage survey. Link industry needs with training programs.	Council Education sector	ongoing	Survey conducted
3.3 Support Health Education and Learning Partnerships (H.E.L.P. program). Involves conducting a needs analysis through industry consultation, training calendar management, the E.YES Youth Employment strategy activities, liaising with high schools, TAFE and businesses.	Council CARS	2019-21	Number of youth engaged
3.4 Support increasing higher education opportunities (especially catering to students who prefer not or cannot move away to study). Investigate the development of a Country Universities Centre program in Eurobodalla working with Country Universities Centre, University of Wollongong, TAFE, high schools, to deliver new tertiary opportunities for local students.	Council Education sector	2020	CUC investigated
3.5 Support development in Aged Care training working with industry and training and job services providers to ensure adequate trained staff levels keep up with increase in demand. Liaise with developers of future aged care infrastructure to establish such demand.	Council Aged Care sector	ongoing	Aged Care training
3.6 Support and assist with initiatives such as Jobs Drive and Career Expos to encourage young and unemployed people to fill local vacancies.	Council Community	ongoing	Programs begun

Key priority 4

Infrastructure and Place Enhancement



Each of Eurobodalla's main commercial centres are unique in their location, form, character and history. These unique qualities need to be recognised and celebrated in the way the centres continue to grow and develop and remain attractive to visitors and future residents. An ideal transport system will support and grow equitable transport for all.

Alongside jobs and growth in industry, Eurobodalla must provide and foster great places for people to live and visit. This includes housing choice and high amenity and quality experiences in town centres, particularly along our foreshores and waterfronts where lifestyle, recreation and tourism opportunities collide. A dedicated focus on town centre and waterfront planning is needed to support the potential activation of key areas including growing the night economy.

A key direction of the South Coast Marine Tourism Strategy is to explore the opportunities for harbour activation and recognises Batemans Bay as a hub. Coupled with this is the once in a generation opportunity to revitalise the Batemans Bay foreshore as part of the realignment of the Batemans Bay Bridge project and the development of the Mackay Park Regional Aquatic and Arts Facility.

It is crucial that potential opportunities to activate waterfronts and town centres are identified in the early stages of major infrastructure investments. Eg. New regional hospital, highway realignments and bypasses.

A large proportion of jobs and economic activity in Eurobodalla are dependent on local and regional freight networks to efficiently move goods. Growth in many sectors will depend on improvements to this network. Future land use and transport planning should take account of significant freight generating activities while protecting the amenity and safety of other land uses and road users.

An equitable and sustainable transport system is required to support and grow the economy. Approximately 40% of households (profile i.d 2016) have either no car or one car. This is relatively high for a regional area and implies there would be high demand for alternative modes of travel.

Actions	Who	When	Measure
4.1 Assist both public and private infrastructure funding applications with relevant information for business cases and supporting documentation.	Council	ongoing	Submissions submitted
4.2 Encourage businesses to review shopfronts and retail windows and accommodation providers to do façade improvements with matched funding, seek expertise.	Council	ongoing	Revitalised shop facades
4.3 Support activities such as Integrated Transport Strategies in our major centres and encourage growth in our public transport system.	Council	ongoing	Strategy developed
4.4 Participate in supporting businesses in Batemans Bay during the new bridge construction.	Council	Next 3 years	Support provided
4.5 Continue to lobby State and Federal Government for improved transport and telecommunications including Shire-wide fast internet and a reduction of mobile phone black spots as detailed in REDS Supporting Analysis p59.	Council	ongoing	Submissions made
4.6 Deliver high quality infrastructure that supports business investment and tourism such as: <ul style="list-style-type: none"> - Redevelopment of Moruya Airport - Mackay Park Aquatic and Arts Centre - Provide B-Double access to the Eurobodalla - Construct the Southern Water Supply Storage facility - Complete the Batemans Bay Link road 	Council	Next 10 years	Infrastructure completed
4.7 Develop town centre revitalisation and activation plans for the main towns and villages of the shire with a goal to strengthen each town centre as highly attractive and functional centres with integrated transport networks and night-time economy for existing and new businesses, investors, residents and visitors.	Council Strategic	Next 3 years	Town plans completed

Appendix

Bibliography

- ABS;NIEIR 2016
- <https://forecast.id.com.au/eurobodalla>
- ADVANCING EUROBODALLA – Geoffrey Potter Consulting -April 9, 2018
- Framework for Regional Economic Development, Regional Australia Standing Council, undated
- The effect of age on Australian small-to-medium enterprise, Australian Government, 2016
- Bass Coast Economic Development Strategy 2016-2021, Bass Coast Shire Council, 2016
- The CPA Australia Asia-Pacific Small Business Survey 2016, CPA Australia, 2017

Referenced strategies

This Strategy builds upon a wide range of existing strategies and policies at a national, state, regional and local level, including the following:

- 20 Year Economic Vision to Regional NSW July 2018
- Eurobodalla Creative Arts Strategy 2018
- REDS: Regional Economic Development Strategy 2018
- Regional Development Australia Far South Coast Strategic Regional Plan 2013-18
- South Coast Regional Strategy 2006 and South East and Tablelands Regional Plan 2016
- Various Australian and NSW Government agency strategic plans and programs
- Eurobodalla Community Strategic Plan 2017
- Eurobodalla Settlement Strategy 2006
- Town Centre Structure Plans for Batemans Bay (2008), Moruya (2007) and Narooma (2005)
- Business Development Strategic Plan 2014-2018
- Eurobodalla Destination Management Plan 2011-2020 and Action Plan 2017-2020
- Eurobodalla Draft Events Strategy 2016-2022
- Eurobodalla Draft Digital Economy Strategy 2017
- Economic Development and Employment Lands Strategy 2011
- Eurobodalla Rural Lands Strategy 2016
- Infrastructure Driving the NSW Economy (ESC, 2015)
- Eurobodalla's Business Chambers' strategic plans
- South East Food Plan (SCPA, 2012)

Background analysis

Population analysis

The composition of the shire's 38,000 permanent persons is somewhat unique and quite different when compared with the rest of NSW. The over 65s are well over-represented, the 'prime working age' groups very under represented, and the very young decline as a percentage with time. Our working age population is relatively small; thus, the workforce struggles to grow.

There is still a perception that the population and economy are growing rapidly due to visible dwellings growth and the ongoing influx of older persons, such as 'sea change' baby boomers into the shire. Whilst this is, or has been, true, further analysis shows the demographic and economic dynamics are now more complex.

In earlier decades Eurobodalla experienced very strong population growth, associated with strong economic and employment growth. From the 1980's to the 2000's we were used to seeing the shire grow by several thousand persons a decade and we moved in leaps and bounds.

So a key message for those wanting even modest, sustainable growth, is that we need to grow a bigger and more broadly based economy to continue to attract and retain workers in the prime age groupings. Ideally we would like to have an employment base that could secure more employment for more working age persons living and in the shire.

- Average age has grown to a current 54 years old (compared with 38 for NSW) and is set to increase as the aged proportion of the population swells.
- In 2016 there were 15,300 households and 23,368 dwellings – in the past these have grown in line with population.

Comparisons with NSW demographics worth noting:

- Older couples without children are currently 18 per cent of households – a proportion that will soon be double that of NSW.
- The couples with children group at 17 per cent is nearly half that of NSW.
- Overall the employment / population ratio is only around 36 per cent.
- Eurobodalla has a much higher proportion of people with a disability.

Appendix

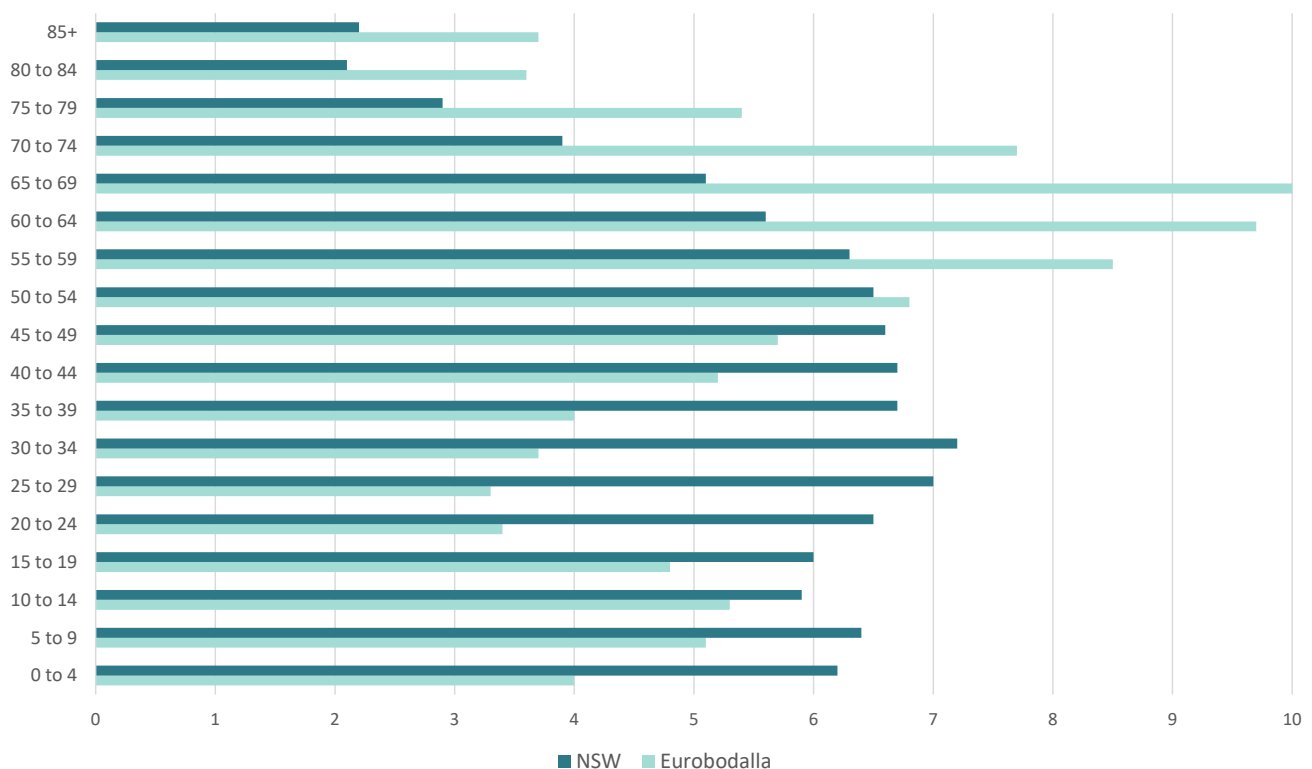
Population challenges

Research identifies much slower population growth in the period 2006 to 2016, and annual population growth of just over 200 persons on average (just 0.5 per cent p.a.), meaning our decade equivalent growth is currently down to about 2000.

People leave, as well as arrive, and if the economy slows, we can lose prime age people. This is indeed a threat. Our future net migration holds the key to Advancing Eurobodalla. This Strategy includes actions to counteract population change volatility and the impact on the local labour force. One estimate puts the 'average annual' population at around 50,000, but steep holiday peaks may be three or four times core population. It is obvious in the chart above that Eurobodalla has a very different ageing population landscape than the rest of NSW. This is only set to increase with our ageing population increasing and young and working age remaining well below state average.

Eurobodalla has one the fastest growing older populations in Australia, creating challenges but also opportunities for market development. At Census, the median age of people in Eurobodalla was 54 years. Children aged 0 - 14 years made up 14.3% of the population and people aged 65 years and over made up 30.6% of the population.

Age distribution of population by groups - 2016 - Eurobodalla Shire compared to NSW



Appendix

Employment Lands

In commercial areas in November 2016, 71 of the 856 business premises were vacant, a vacancy rate of 8.3%. This compares to the vacancy rates in 2010 of 9.8% and in 2013 of 9.7%. So, while the number of premises and the number of vacant premises changes over time, the vacancy rate has been steadily declining.

In industrial areas in November 2016, 21 of the 354 business premises were vacant, a vacancy rate of 5.9%. This compares to the vacancy rates in 2010 of 14.3% and in 2013 of 8.1%. In industrial areas, the number of premises has increased at a lower rate than the increase in the number of businesses, resulting in a significant decline in the vacancy rate. This low vacancy rate supports the need to find more land that can be developed for industrial development into the future.

In 2016, there were 82 vacant lots zoned for commercial development across Eurobodalla.



Appendix

Development applications

The number and value of development applications are growing strongly across both residential and commercial developments.

	FY13/14	FY14/15	FY15/16	FY16/17	FY17/18
Number of DAs	204	241	278	236	312
Value of DAs	\$110M	\$100M	\$132M	\$116M	\$176M

The value of development approved in Eurobodalla has reached an all-new high. Council approved 903 development and modification applications in 2017-18, which included 312 new dwellings. This is up 12% on the previous financial year and up 16% on the five-year average.

Appendix

Gross Regional Product

The Gross Regional Product of an area is the equivalent of Gross Domestic Product, but for a smaller area. It is the amount of the nation's wealth which is generated by businesses, organisations and individuals working in the area.

This dataset is derived from the National Economics micro simulation model, and is a broad indicator of the growth or decline of the local economy over time. Data is presented for each year back to 2002.

Gross regional product for the shire is forecast to grow at an average rate of 2.4 per cent per annum to 2035, that is, at a slightly lower rate than is forecast for the State of NSW at 2.69 per cent. GRP in the Eurobodalla Shire is forecast to decline slightly over the period to 2020 before growth commences, once more. Drivers of industry GRP growth have been the construction, retail trade, Education and

training and health services and social assistance.

While the accommodation and food services sector has grown, its contribution to GRP growth has been lower than the other key industry sectors and like the construction sector has actually declined in the most recent period since 2010.

Appendix

Snapshot of Eurobodalla's key industry sectors

Tourism - the driving force

Eurobodalla's economy is spread across a range of industries each making significant contributions. No one industry stands out and though tourism is clearly a driving force it does not fit neatly into any one of the standard industries classified by the ABS. The tourism industry is made up of parts of many other more specific industries, including parts of retail, accommodation and food, arts and recreation services and agriculture. The total value of the tourism industry in Eurobodalla was estimated to be over \$370m in the year ending 30 June 2016, and it provides the largest contribution to GRP at almost 14%. Tourism also has a significant multiplier effect that flows out to businesses not normally considered to be associated with tourism.

Health care and social assistance

The health care and social assistance industry was the largest of the classified industries in Eurobodalla in 2015, with a contribution of 12% of GRP. The industry was Eurobodalla's second largest industry by employment in 2015 (1,848 jobs) – slightly below retail in employment size. It showed the highest number of new jobs from 2005 to 2015 at 407 and has good growth prospects through to 2035.

The industry is important for Eurobodalla as it provides a large and growing number of jobs, delivering a wide range of health and social services required by residents, given the ageing population. The jobs themselves are an important part of the economy, as they are a mix of high skill and high wage professional jobs (37% of jobs in the industry in Eurobodalla) and lower skill lower wage jobs (35% of jobs in the industry in Eurobodalla). Over the short to medium term, it will be important to ensure that Eurobodalla's share of health services and related investments continues to grow to meet community needs and expectations.

Construction

Construction is a major industry in Eurobodalla, on the back of sustained population growth, expansion of commercial developments, and a solid market for new residential and residential redevelopment and upgrades. The value of building approvals in Eurobodalla in recent years has been growing. The industry is the second largest contributor to GRP – 10%. The industry is also a significant employer, with a total of 1,451 jobs in Eurobodalla in 2015, and another 119 jobs done by residents but based in neighbouring local government areas. While the number of construction jobs in Eurobodalla fell by 368 from 2005 to 2015, it remains important for local employment, particularly for young people.

Retail trade

Retail trade is a major employer in Eurobodalla, with the jobs servicing both Eurobodalla residents and the large number of visitors. The industry contributed 9% of GRP in 2015, and had the largest number of jobs (many part time) of any sector at 1,898. The number of retail jobs in Eurobodalla fell by around 218 over the decade to 2015, but further population growth is expected to underpin continuing jobs growth in the industry through to 2035. Retail will remain important, particularly as an employing sector and for young people to enter employment. The retail sector is also important in terms of the vibrancy and confidence in our commercial centres. However, the potential impacts on jobs growth resulting from increased use of on-line retail platforms will need to be monitored.

Accommodation and food services

Accommodation and food services contributed 9% of GRP in 2015, and is a very large industry in Eurobodalla in part because of its role in relation to tourism – a key economic driver in Eurobodalla. The industry employed 1,392 people in 2015, an increase of 106 over 2005.

Education and training

Eurobodalla has good depth in primary, secondary and tertiary education – including several private schools, TAFE and University of Wollongong campuses. Education and training contributed around 8% to Eurobodalla's GRP in 2015, employing 1,153 people. This number of people employed grew significantly from 2005 to 2015 – with a total of 365 new jobs over the decade.

Over the short to medium term, it will be important that education and local industry work towards creating a cohesive system that considers local industry educational and training needs and that local businesses become more engaged in the education and training process as a way of creating a local advantage. To achieve the best employment outcomes, the skills of residents are going to have to align with the demands of changing industry and opportunity. This message needs to be loud and clear and quality opportunities for retraining and learning new skills have to be available (particularly important in the next five years) locally. Council has a key role to play here in facilitating links between education, training and employment.

Agriculture

Agriculture, forestry and fishing is an important foundation industry in Eurobodalla, seeing a resurgence of activity in diversified small and medium scale production and value adding. The industry is small in overall economic terms – contributing

3% of Eurobodalla's GRP and 310 direct jobs – but has significant impact on the economy through its connections with other industries including tourism, manufacturing (food processing) and transport. Despite a recent decline in total job numbers in agriculture, there was significant growth in the value of commercial agriculture to the Eurobodalla economy between 2006 and 2011, from \$12.5 million to \$20 million per annum. In addition, an economic impact study of the SAGE Farmers Market shows that the total immediate economic benefit of the market to the local economy is in the order of \$3.2 million, before the application of any economic multipliers.

Manufacturing

Eurobodalla may not be known as a major manufacturing centre, but it has a diverse range of manufacturers – many of which supply products to markets outside the region. Overall, manufacturing in Eurobodalla contributed almost 5% of GRP and jobs in Eurobodalla in 2015.

Creative arts

Current economic data suggests the creative arts contributes 2.7% of the region's economy. Given the relative proximity and links to Canberra and the region's capacity for lifestyle attraction, there is significant potential for growth in this sector. Growth will also be driven by enhanced internet connectivity and by further promotion of creative art opportunities within other economic sectors and in the planning and design of infrastructure.



Appendix

Businesses by industry and employment by industry

The mix of jobs available in Eurobodalla reflects the Shire's role as a holiday destination and a regional service and administrative centre

Industries with the most individual businesses include Construction, Accommodation and Food, Retail, Agricultural and Professional Services.

EUROBODALLA SHIRE	Businesses in 2017			Businesses in 2014			Difference
Industry	#	%	NSW%	#	%	NSW%	2014 to 2017
Agriculture, Forestry and Fishing	207	7.2	7.1	219	7.9	7.9	-12
Mining	3	0.1	0.2	9	0.3	0.2	-6
Manufacturing	115	4.0	3.5	111	4.0	3.7	+4
Electricity, Gas, Water and Waste Serv	9	0.3	0.3	8	0.3	0.3	+1
Construction	717	24.8	15.8	657	23.5	14.9	+60
Wholesale Trade	45	1.6	3.7	44	1.6	4.0	+1
Retail Trade	260	9.0	5.8	271	9.7	6.5	-11
Accommodation and Food Services	229	7.9	4.1	223	8.0	4.1	+5
Transport, Postal and Warehousing	132	4.6	6.8	137	4.9	6.2	-5
Information Media and Telecom	14	0.5	1.2	16	0.6	1.2	-2
Financial and Insurance Services	155	5.4	9.1	130	4.7	8.5	+25
Rental, Hiring and Real Estate Services	271	9.3	11.0	273	9.8	11.1	-3
Professional, Scientific/Tech Services	240	8.3	13.1	228	8.2	13.0	+12
Administrative and Support Services	107	3.7	4.0	91	3.2	4.0	+16
Public Administration and Safety	3	0.1	0.4	8	0.3	0.4	-5
Education and Training	29	1.0	1.4	32	1.1	1.4	-3
Health Care and Social Assistance	149	5.1	5.9	146	5.2	5.7	+3
Arts and Recreation Services	39	1.3	1.3	30	1.1	1.3	+9
Other Services	153	5.3	4.0	134	4.8	4.0	+19
Total business	2,896	100	100	2,791	100	100	+105

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, 2015 to 2017 Cat. No. 8165.0

Employed in 2016/17			Employed in 2011/12			Difference
#	%	NSW%	#	%	NSW%	2014 to 2017
444	3.1	2.3	551	4.1	2.4	-107
25	0.2	1.1	88	0.7	1.1	-64
703	5.0	7.0	797	5.9	8.6	-94
185	1.3	1.1	176	1.3	1.3	+8
1,162	8.2	8.0	1,083	8.0	7.8	+78
248	1.8	3.5	223	1.7	4.4	+24
2,029	14.4	9.9	1,983	14.7	10.1	+47
1,590	11.3	7.2	1,513	11.2	6.9	+77
524	3.7	5.2	619	4.6	5.4	-95
197	1.4	2.5	297	2.2	2.7	-99
146	1.0	5.1	189	1.4	5.1	-44
231	1.6	1.9	249	1.8	1.8	-17
543	3.8	8.7	532	3.9	8.1	+12
529	3.7	3.6	490	3.6	3.4	+39
976	6.9	5.9	829	6.1	6.0	+147
1,187	8.4	8.6	1,137	8.4	7.9	+50
2,521	17.8	12.7	1,849	13.7	11.2	+673
258	1.8	1.8	264	2.0	1.7	-5
634	4.5	3.8	633	4.7	4.0	+1
14,133	100	100	13,501	100	100	+632

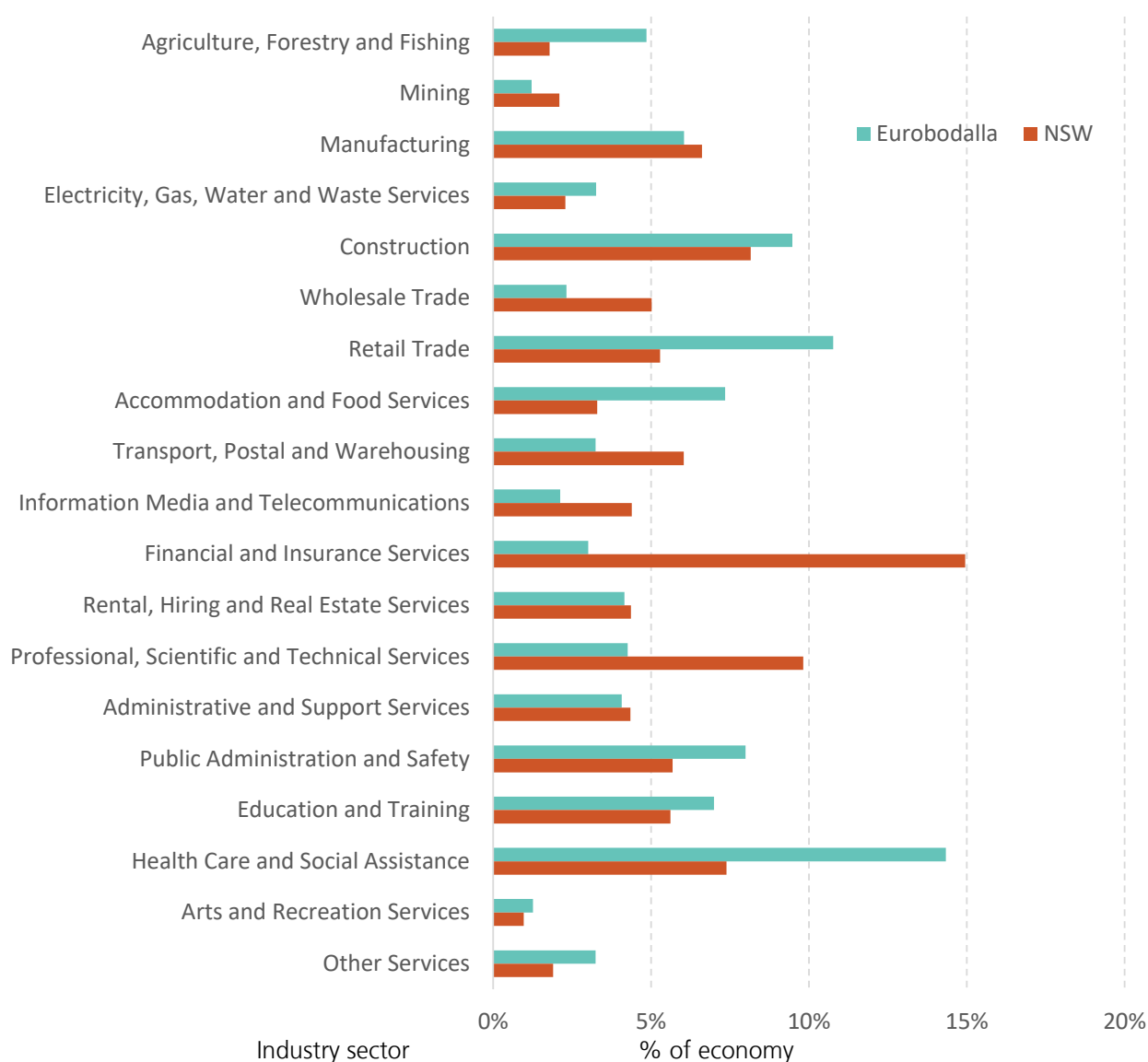
Appendix

Employment (total) by industry

The mix of jobs available in Eurobodalla reflects the Shire's role as a holiday destination and a regional service and administrative centre. Compared to the

non-metropolitan NSW as a whole, Eurobodalla has higher percentages of residents employed in retail, hospitality (accommodation and food services) and reflecting our Ageing population, Health care & social assistance.

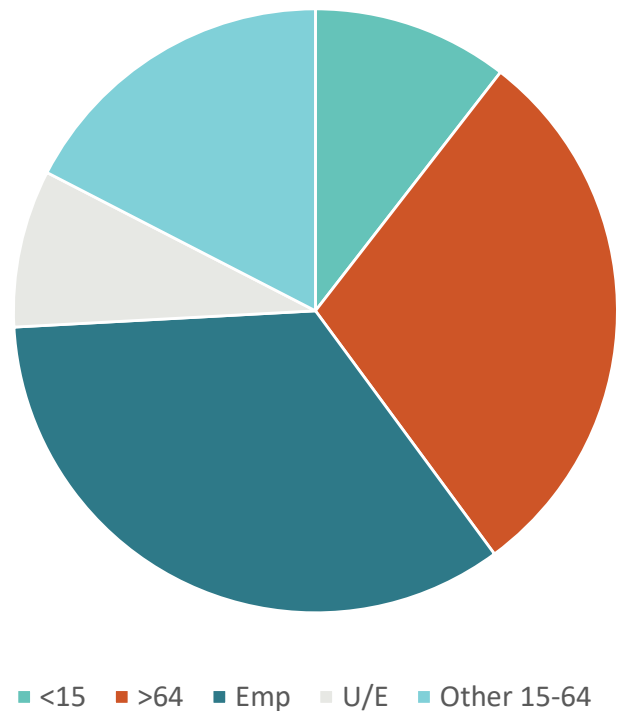
There is an untapped opportunity to diversify into high value service jobs" (ie specialist medical facilities, IT applications, R&D, professional business services...)



- The 65 plus group, who are currently about 30 per cent of the population, feature strongly in local identity. (In Eurobodalla 73 per cent are on aged pensions, compared with 68 per cent for Australia. NIEIR - (2016) p.31). They are growing as a proportion of the population.
- Those less than 15, at home or in school full time, are 11 per cent. The proportion of this group has fallen gradually over time.
- The employed and unemployed are the workforce which is small by normal standards. Currently 35* Per cent of population are employed and 8* percent unemployed. (Measures for the workforce are shown below). This group may be shrinking –but it depends on the level of unemployment one accepts.
- The residual / other group, not in the labour force 15 to 64, are estimated at 17 per cent - a relatively large, complex group. The group is likely to include those with family responsibilities; never worked / no desire to work; discouraged job seekers or hidden unemployed (see below), or persons on disability pensions or unpaid carers. (The group here includes 15-19 year olds in school or training (or work) – ie. the estimate here assumes most don't work).

Being not in the labour force 15-64, many in this group may have education and training needs, or other social needs' quite different to the other groups

Estimates of age and labour market groups 2015



The most striking implication of the chart is the amount taken up by very young and over 65's (41%). If we add the residual 15 to 64 group (purple), and / or the unemployed, it is not hard to see significant disengagement that is not school or retirement. Labour force participation is just 44 - 48 per cent

