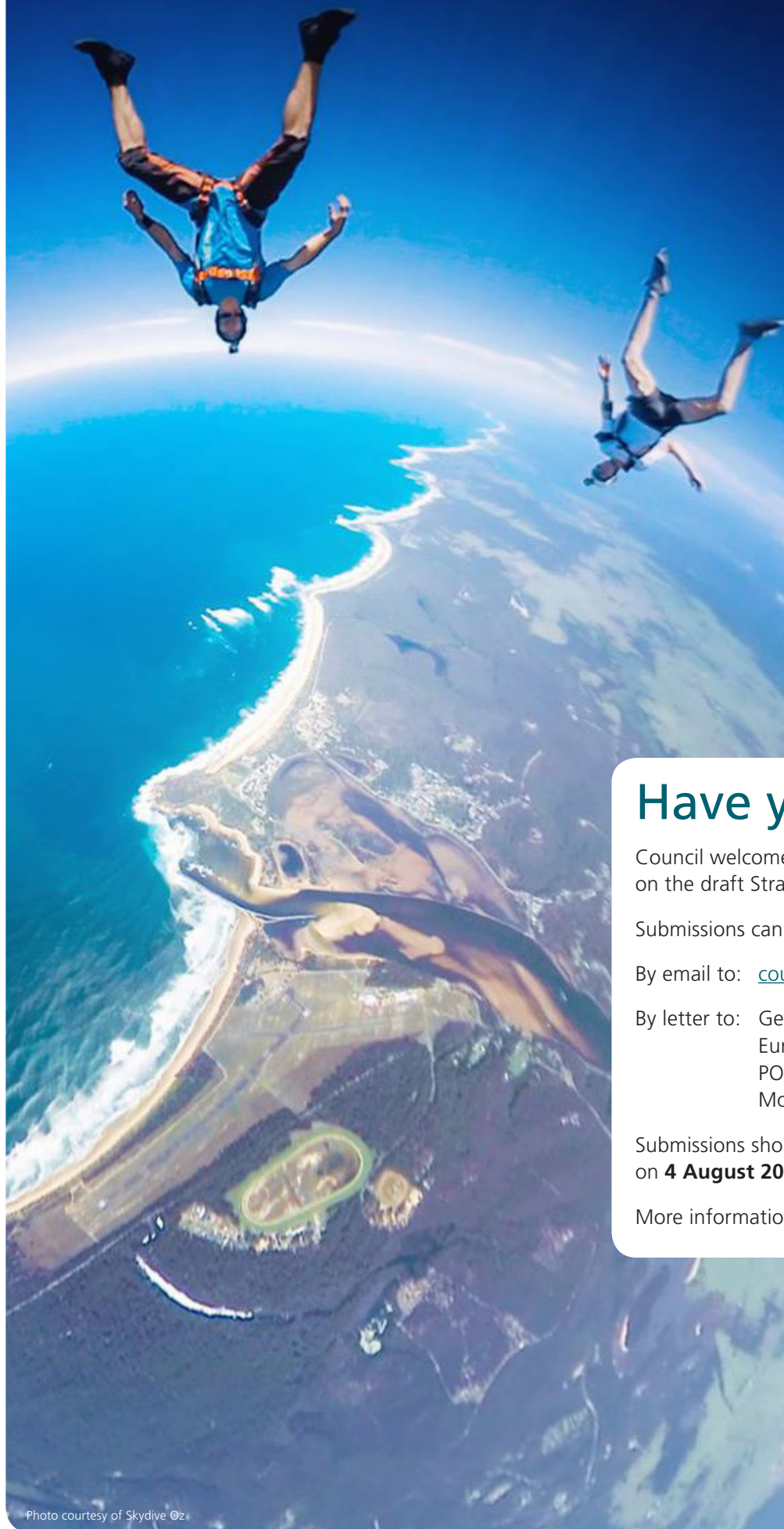


# Advancing Eurobodalla

## A Draft Integrated Economic Growth and Development Strategy

13 JUNE 2017





## Have your say

Council welcomes feedback from the community on the draft Strategy and Action Plan.

Submissions can be made:

By email to: [council@esc.nsw.gov.au](mailto:council@esc.nsw.gov.au)

By letter to: General Manager  
Eurobodalla Shire Council  
PO Box 99  
Moruya NSW 2537

Submissions should be received by 4.30pm on **4 August 2017**.

More information: [www.esc.nsw.gov.au](http://www.esc.nsw.gov.au)



# Mayors Message

This draft Integrated Economic Growth and Development Strategy is a comprehensive plan and set of actions for government, Council, businesses and our community that aims to ensure a productive and prosperous future for Eurobodalla.

The draft Strategy has been developed with input from local business people across a range of industry sectors and representatives of the NSW and Australian governments. I would like to thank everyone who has helped us get to this point and I now look forward to more input from the broader community.

Working together, we can deliver positive outcomes to deliver economic growth in a manner that builds upon our shared values and our natural advantages.

I am optimistic about Eurobodalla's future and proud of the leadership role that Council plays to advance sustainable economic growth and development for our Shire and our region.

While there are a number of challenges to achieving sustainable economic growth in Eurobodalla, I believe we should be looking at the opportunities within the challenges.

I am confident that we can advance Eurobodalla and achieve sustainable economic growth and development through working together with our government, business and community partners on the actions outlined in this draft Strategy.

I encourage everyone to read the draft Strategy that is now on exhibition and to let us know what you think.



# Executive Summary

The Eurobodalla economy, originally built on dairying, forestry and fishing, is now more diverse and is based around tourism, retail, health services, property services and a wide range of agricultural activities.

Planning for economic growth in Eurobodalla over the next 20 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 draft 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 from the Citizens Jury process in 2016, 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 draft Strategy proposes the following vision for a productive and prosperous Eurobodalla:

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To increase economic growth and improve the economic and social wellbeing of the community by sustainably building upon our valued natural assets and other strategic advantages.

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The draft Strategy is accompanied by a draft Action Plan containing strategies and actions that focus on major initiatives to stimulate economic growth as well as addressing the key determinants of regional economic growth identified by the Regional Australia Standing Council.



# Purpose of the Strategy

The draft Integrated Economic Growth and Development Strategy (the draft Strategy) provides a framework to promote and facilitate sustainable economic growth and development in the Eurobodalla local government area.

Sustainable growth will protect the values that are important to the local community and the values that underpin the local economy. The draft Strategy is based on the current economic climate in Eurobodalla, the existing strategic policy context at the national, state and local level, and the drivers of future **economic growth** at local and global levels.

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## What is economic growth?

Fundamentally, economic growth is the increase in the market value of the goods and services produced by an economy over time in real terms. There are many ways to achieve economic growth, not all of which are sustainable or desirable, nor able to be implemented by Council.

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The overall goal of the draft Strategy is to sustainably increase economic growth to improve the economic and social wellbeing of the community. In practice, the goal is successful implementation of the strategies and actions in the accompanying draft Action Plan, which has been designed to shape the efforts of Council, governments, businesses and the community to achieve sustainable economic growth. The draft Strategy includes a process for monitoring and measuring progress of the draft Action Plan.

At a practical, operational level the draft Strategy will:

- focus 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
- encourage economic outcomes compatible with local aspirations, needs, values and resources
- involve collaboration and partnership between the public, private and community sectors, and
- foster a more resilient and diversified local economy.

Utilising existing relationships and networks and building on the work already being done, Eurobodalla Shire Council is well positioned to promote Eurobodalla as an economic centre within a wider economic region. Council has a key role to play as advocate and partner for a range of economic opportunities.

However, it is acknowledged that Council's ability to influence economic growth is limited and that the private sector, community and other levels of government have more significant roles to play in increasing economic growth and implementing **sustainable economic development** initiatives.

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## What is sustainable economic development?

Economic development can be defined as efforts (eg. policies, programs and interventions) that seek to improve the economic wellbeing of the community by creating and/or retaining jobs and supporting or growing incomes and the tax base. Sustainable economic development is about ensuring that economic growth can continue indefinitely, without undermining the foundations upon which the economy is based. Sustainable economic development also ensures that social and environmental sustainability is achieved, through reinforcing and supporting the community's shared values and capitalises on the strengths and advantages of the place.

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Successful economic development is dynamic, innovative and opportunistic, yet challenging and largely influenced by external economic factors. As such, this draft Strategy should be viewed as a flexible approach that recognises the need for wide participation and diverse partnerships to achieve the desired outcomes.

# How has the Strategy been prepared?

In the development of this draft Strategy, key stakeholders have been engaged through one-on-one interviews and through a facilitated workshop held on 18 May 2016.

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 draft Strategy has been prepared taking into account 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.

This draft strategy will be exhibited for broader community input before a final Strategy is endorsed by Council for implementation.

## Learning from successful communities

There are a variety of community economic development plans around Australia and internationally, but successful communities tend to have these three things in common:

1. An articulated, shared vision of where they want to go and of what things residents and businesses value in their community. Their plans for economic development reflect these shared values.
2. A suite of actions which take the community towards these shared values, and which are within the community's resources to deliver.
3. Lack of reliance on government intervention and direct involvement of local businesses and communities.



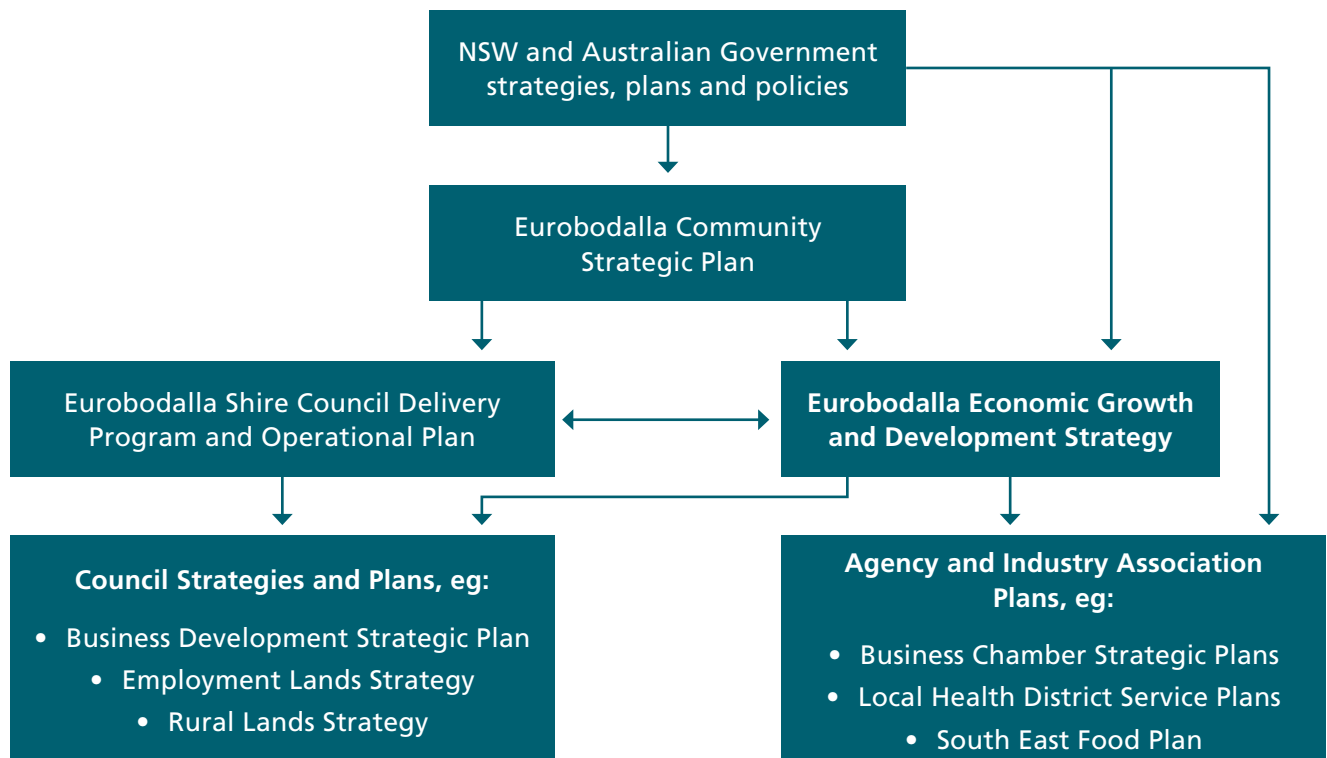
# Strategic policy context

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

- [Regional Development Australia Far South Coast Strategic Regional Plan 2013-18](#)
- [South Coast Regional Strategy 2006 and Draft South East and Tablelands Regional Plan 2016](#)
- Various Australian and NSW Government agency strategic plans and programs
- [Eurobodalla Draft 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 draft Action Plan 2017-2020](#)
- Eurobodalla Draft Events Strategy 2016-2022
- Eurobodalla Draft Digital Economy Strategy 2017
- Eurobodalla Draft Creative Arts Action Plan 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 \(SCPA, 2012\)](#)

A summary of each of the above strategies and plans is provided in Appendix 1.

Where does the draft Strategy fit in this strategic policy context?



# Alignment with Eurobodalla's Community Strategic Plan

This draft Integrated Economic Growth and Development Strategy will contribute toward achieving the friendly, responsible, thriving and proud community that is the community's overarching vision as outlined in the 2017 Draft Eurobodalla Community Strategic Plan.

In the 2017 review of the Community Strategic Plan, the community outlined the following vision for Eurobodalla's future:

## Friendly

- Pride of place, ease of access, community harmony, and a mobile and healthy population that is encouraged and motivated to participate in community life.

## Responsible

- Appreciation of our natural surroundings that support our economy and lifestyle. Responsible planning and management practices to maintain our biodiversity and unique character. To minimise our impact and make best use of valuable resources.

## Thriving

- Work together to enable positive investment and employment opportunities. An innovative, diverse and resilient economy with business confidence, market strength and industry diversity.

## Proud

- A collaborative community that is engaged. Informed, proactive and involved. Responsible decision making and a sound financial position supported by capable leaders, functional assets and efficient operations.

The Action Plan in this Strategy advances these vision statements in a number of ways, including through the following strategies:

- Planning for a vibrant and diverse economy
- Planning to address social and environmental trends
- Encourage business and development that aligns with Eurobodalla's unique qualities
- Improve infrastructure that facilitates market access and business opportunities
- Build relationships to improve services and an "open for business" culture.





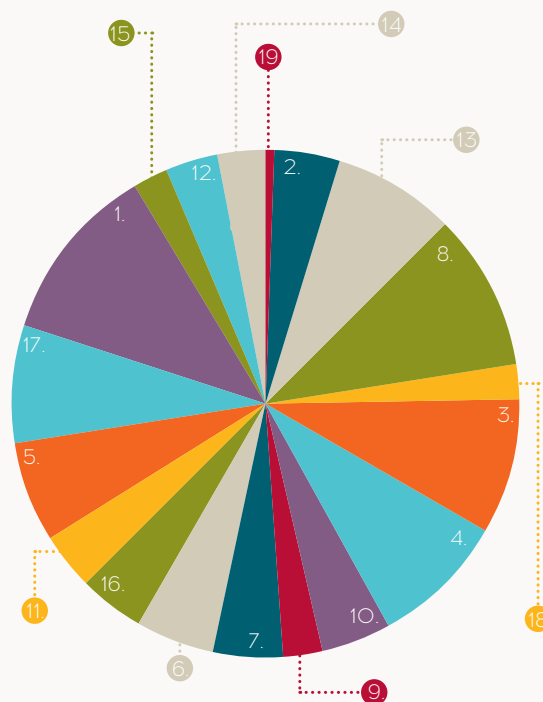
# Economic snapshot of Eurobodalla

Eurobodalla's economy, originally built on dairying, forestry and fishing, is now more diverse and is based around tourism, retail, health services, property services and a wide range of agricultural activities.

Planning for economic growth in Eurobodalla over the next 20 years will focus on strengthening the qualities that attract people to visit and live in the area: high quality tourism and recreation opportunities, small to medium-scale agriculture, food and rural tourism, and heritage, cultural and natural experiences.

## INDUSTRY CONTRIBUTION TO GROSS REGIONAL PRODUCT

- |                       |                         |
|-----------------------|-------------------------|
| 1. HEALTH 12%         | 11. ADMINISTRATION 3.7% |
| 2. CONSTRUCTION 10.1% | 12. OTHER SERVICES 3.5% |
| 3. RETAIL 9.2%        | 13. ELECTRICITY 3.2%    |
| 4. ACCOM/FOOD 9.1%    | 14. AGRICULTURE 3.1%    |
| 5. PUBLIC ADMIN 6.9%  | 15. ARTS 2.9%           |
| 6. RENTAL 5.1%        | 16. IT 2.8%             |
| 7. FINANCE 4.6%       | 17. EDUCATION 2.7%      |
| 8. MANUFACTURING 4.6% | 18. WHOLESALE 2.4%      |
| 9. PROFESSIONAL 4.5%  | 19. MINING 0.6%         |
| 10. TRANSPORT 4.5%    |                         |



Predicted population growth 2016 to 2036

**0.85%**  
per annum

Predicted job growth 2016 to 2036

**1.3%**  
per annum

Predicted gross regional product growth 2016 to 2036

**2.4%**  
per annum

Predicted household disposable income growth 2016 to 2036

**2.6%**  
per annum



“ 2,763 businesses provide 12,224 local jobs ”



“ Our local economy is worth \$1.31 billion each year ”



“ Our tourism industry is valued at over \$370 million each year ”

# Snapshot of key industry sectors



## TOURISM

1/3

of all jobs are directly or indirectly **related to tourism**



## HEALTH

37%

of jobs in health & aged care are **high-skilled jobs**



## RETAIL

1,898

number of jobs in retail sector, highest of any sector in Eurobodalla



## CONSTRUCTION

\$118m

value of building approvals in 2015-16, highest since 2002-3



## EDUCATION

365

number of new jobs in the education sector since 2005 (1 new job every 10 days)



## MANUFACTURING

\$43.8m

value-add from the manufacturing sector in 2015-16



## ACCOMMODATION & FOOD SERVICES

\$109.4m

value of exports from the accommodation and food services sector in 2015-16, highest of any sector in Eurobodalla



## AGRICULTURE

\$37.1m

value-add from the agriculture, forestry and fishing sector in 2015-16



## CREATIVE ARTS

\$1.0m

value-add from the creative and performing arts sector in 2015-16



# What is Council's role in economic development?

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.



## Economic development – who does what?

All three levels of government in Australia and the business community are actively involved in economic development.

The **Federal Government** sets the macro economic conditions within which regional economies operate, and is also an important provider of funding from income tax and GST revenue for key regional infrastructure such as roads, airports and broadband telecommunications. The Australian Government has recently announced a Regional Jobs and Investment Package, with \$20m to be allocated to the NSW South Coast in grants for business innovation, local infrastructure projects and skills and training programs.

The **NSW Government** has recently released a Regional Development Framework focusing on providing quality services and infrastructure in regional NSW, aligning efforts to support growing regional centres and identifying and activating economic potential.

**Eurobodalla Shire Council** recognises that it has a key role as a strategist and leader within the economic development landscape across the local government area.

The **Eurobodalla business community**, comprising individual businesses and business groups are themselves key players driving economic growth through their individual and collective actions. Business and industry associations, such as Chambers of Commerce help local businesses come together to support each other, set strategic directions for the local business community and to advocate on behalf of their sectors.

# Key economic drivers in Eurobodalla

Over the next two decades the key economic drivers in the Eurobodalla are likely to be the following:

## Industry sectors

- Tourism (including accommodation, food services, tours, attractions and experiences)
- Health care and social assistance (including aged care)
- Education and training
- Construction
- Retail
- Agriculture (small to medium scale and value-adding)

In addition to these key sectors, growth in professional and business services, information technology and high-tech, 'green' industries will facilitate greater economic diversity in Eurobodalla.

A snapshot of these and other industry sectors is provided in Appendix 3.

## Strategic drivers

- Skills and skills development
- Internet and telecommunications
- Capacity to export (this includes tourism related activity)
- Knowledge based and creative skills
- Natural assets and other strategic advantages
- Ageing population



## Eurobodalla's natural assets

- Unspoilt beaches and waterways
- Clean water and air
- Significant areas of vegetation and wilderness protected in National Parks
- Batemans Marine Park
- Heritage towns and villages
- Aboriginal cultural heritage
- Productive agricultural lands

## Eurobodalla's strategic advantages

- Nearest coastal towns to Australia's capital city, Canberra
- Steady population growth
- Affordable residential and commercial property
- Relaxed coastal lifestyle and popular family holiday region
- Princes and Kings Highways providing direct links to Sydney, Canberra and Melbourne
- Moruya Regional Airport
- A diversifying agricultural base and a growing reputation for quality local food, including dairy and aquaculture products
- Strong sense of community

The main growth industries in Eurobodalla over the next 20 years will comprise a mix of our traditional strengths - population and visitor servicing retail, hospitality, health and education services, construction and agriculture - alongside emerging industries in professional and business services and potentially information and green technologies.



# Global trends and impacts on economic growth and development

The global trend of a shift from an industrial/manufacturing economy to a knowledge-based economy is increasingly affecting economic growth and development at regional and local levels.

These trends include:

## Globalising business

Many manufacturing jobs and service jobs are moving to less expensive locations and new markets. Successful businesses have to be able to compete in the global marketplace, utilising the internet, satellites, and other advances in telecommunication which enable companies to integrate their operations globally.

## Focus on innovation

Innovation in the manufacturing sector has increased global supply chains – design can be in one location, component production in dozens of others, and manufacture somewhere else. High quality communications technologies are a crucial part of this new approach. In areas where government authorities have facilitated access to the best available information and communication infrastructure, the economic and community gains have been substantial.

## Place-based development and investment facilitation

With increasingly global production systems for goods and services, the nature and differentiators of 'place' are becoming much more significant. What is a place known for, and how does it compete in world markets? Identification of the differentiators recognised and valued by markets is a crucial pre-requisite in attracting the investment needed to help local businesses thrive.

## National drivers of economic growth

The key drivers of economic and employment growth at a national level are:

- National and global policy actions to address climate change and the transition to a carbon constrained future.
- Demand and competition from emerging economies, especially China and India.
- The widespread adoption of new information technologies and rapid development of the knowledge / digital economy.
- Demographic change, especially a growing and ageing population.

As a consequence, the main industries expected to experience strong growth in NSW mirror those highlighted as earmarked for national growth and are:

- Professional services (for private and business clients)
- Construction – especially new housing, sustainable housing (new and adapted) and infrastructure
- Health
- Information and communications technologies.

# Development of skills to capitalise on global trends

## Retooling the workforce

Education is closely tied to economic wellbeing. Skill requirements are changing and most of the high growth jobs fields are those requiring post-secondary education. There is increasing demand for technical and professional skills, which is resulting in an increased emphasis within companies on training and retraining. Companies are focusing on geographical areas with pools of skills and graduating students in order to fulfil their workforce needs. At the same time, quality of life is becoming increasingly important for recruiting and retaining technicians and professionals.

### ***Regional Development Australia South Coast Skills Audit 2016***

In 2016, RDA Far South Coast undertook a skills audit to identify the current and potential future skills shortages in the region. The audit also collated information from businesses on growth and employment plans. Businesses who contributed to the audit identified economic and social factors around remuneration, lack of services, location and small population base as some of the key factors that limit their ability to attract and retain key qualified/specialised personnel to the region. Strategies identified to address this issue included increased education funding and training opportunities, higher wage growth and increased spending on infrastructure and development.

## Attracting high-tech business and jobs

The share of high-tech employment within a region is important because it makes a positive contribution to productivity and value added output and hence a region's wealth. The issue for Eurobodalla is to create strategies that influence industry composition and employment over the long term to ensure high-tech employment prospects continue to grow into the future. Key principles to consider in creating strategies are:

1. Individuals and small business exporting services will generate most high tech jobs.
2. There are strong opportunities in the health care and education sectors for high-tech jobs.
3. Maximise existing strengths and supplement these with high-tech development.
4. Focus on tourism branding, lifestyle advantages (eg. cafes) and availability of services (eg. schools), which are important for attracting people with high-tech skills.
5. Provide incubators for start-up businesses and value-add opportunities (eg. food product manufacturing).
6. Importance of NBN and new technologies.

In Eurobodalla, employment in the industry sub-sectors classified as high-tech has risen slightly from 12.5% of total employment in 2000 to 13.6% in 2015. However, when compared to New South Wales at 26.4%, there was a significantly lower share of high-tech employment in Eurobodalla in 2015.





# Future direction

The vision for a productive and prosperous Eurobodalla into the future is:

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To increase economic growth and improve the economic and social well-being of the community by sustainably building upon our valued natural assets and other strategic advantages.

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This vision supports the community's desire for a liveable, sustainable, productive and collaborative Eurobodalla as outlined in the 2017 draft Eurobodalla Community Strategic Plan (CSP) and contributes to achieving the following nine objectives of the CSP:

1. Strong communities, desirable lifestyle
2. Celebrated creativity, culture and learning
3. Protected and valued natural environment
4. Sustainable living
5. Vibrant and diverse economy
6. Responsible and balanced development
7. Connected and accessible places
8. Collaborative and engaged community
9. Innovative and proactive leadership



The strategies and actions in the accompanying draft **Integrated Economic Growth and Development Action Plan** are structured as follows:

- A. Major initiatives
- B. Actions that will address the key determinants of long-term regional economic growth\*
  - B1 Human capital
  - B2 Sustainable communities and population change
  - B3 Access to markets
  - B4 Comparative advantages and business competitiveness
  - B5 Effective cross-sectoral and inter-governmental partnerships and integrated regional planning

\* The key determinants of long-term regional economic growth are outlined by the Regional Australia Standing Council.

# How will we monitor implementation?

To measure whether Eurobodalla is achieving sustainable economic growth, the Strategy proposes a set of broad measures (see box) which mark the current baseline and can be used to track future progress in addition to specific performance measures related to each recommended action (see Action Plan).

While it is important to measure progress, it should be noted that attributing improvements in the economic and social wellbeing of the community to the strategy may be difficult given the relatively limited role Council plays in economic growth and development.



## Monitoring measures

- Gross Regional Product (GRP) per resident
  - Measures the 'net wealth' of the LGA as population and GRP grow
- Diversity of business mix
  - Measured by either overall industries, or focusing on high priority industries like those with more higher paying employment positions
- Number of hi-tech jobs
  - Tracks the National Institute of Economic and Industry Research (NIEIR) defined high tech jobs – a sign of economic transition and income growth
- Labour force participation
  - Tracks the share of residents working and their hours of work and thereby the level of employment activity in the economy
- Unemployment
  - Tracks number and percentage of unemployed as a measure of economic health
- Wage and salary income distribution
  - Australian Taxation Office LGA tax data tracks earned income to monitor progress towards higher local disposable income

## Appendices

Appendix 1: Strategic policy context

Appendix 2: Economic snapshot of Eurobodalla

Appendix 3: Snapshot of Eurobodalla's key industry sectors

## Additional information

- [Framework for Regional Economic Development, Regional Australia Standing Council, undated](#)
- [Small Towns, Big Ideas, University of North Carolina, 2008](#)
- [Regional Economic Development, A Review, London School of Economics and Political Science, 2012](#)
- [A guide to preparing the economic development element of a comprehensive plan, Wisconsin Economic Development Institute, 2003](#)
- [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](#)

## Appendix 1: Strategic policy context

### Regional Development Australia Far South Coast Strategic Regional Plan 2013-18

The Australian Government's Regional Development Australia (RDA) initiative is about 'local people developing local solutions to local issues' and building 'partnerships to develop strategies and deliver sustainable infrastructure and services to their regions'. (RDA website). The [Far South Coast RDA Strategic Regional Plan](#) outlines goals and priorities encompassing the following five themes:

- Broaden our economic base
- Build infrastructure capacity
- Preserve and nurture our natural environment
- Improve our quality of life
- Engage our community.

### South Coast Regional Strategy 2006 and Draft South East and Tablelands Regional Plan 2016

The NSW Government's [South Coast Regional Strategy](#) (SCRS) states that 25,800 new jobs are needed across the region (Shoalhaven 14,400, Eurobodalla 6,200 and Bega Valley 5,200) to support the projected population growth from 2006 to 2031. One of the key economic challenges identified in the SCRS is to ensure sufficient employment lands are available in appropriate locations to accommodate growth in existing and emerging industries. Another key challenge identified is to encourage and investigate opportunities to diversify the economy into community and human services, education and aged care. The Strategy also identifies primary industries, defence and tourism as key sectors for the region.

The [Draft South East and Tablelands Regional Plan](#), which will replace the SCRS, does not identify a jobs target for the region. This draft Plan includes a goal to 'strengthen the economic opportunities of the region' through a focus on supporting growth in tourism, primary industries, minerals and energy resources, regional strategic assets and the economic self-determination of Aboriginal communities.

### Various Government agency strategic plans and programs

Various Australian and NSW Government agencies produce plans or implement programs that influence regional economic growth, including the following:

- [Australian Government's Regional Jobs and Investment Package](#)
- [NSW Government's Regional Development Framework](#)
- [NSW Government's Jobs for the Future initiative](#)
- [NSW Government's Budget Paper No.2 \(2016-17\) incorporating the Restart NSW Fund, the Rebuilding NSW Plan and the State Infrastructure Plan](#)
- NSW Government's [State Health Plan and Rural Health Plan](#), and the [Southern NSW Local Health District's Eurobodalla Health Care Services Plan 2014-19](#)
- [NSW Government's Agriculture Industry Action Plan](#).

### Draft Eurobodalla Community Strategic Plan 2017

Eurobodalla's [draft Community Strategic Plan](#) (CSP) identifies the community's main priorities and aspirations for the future and presents a pathway to achieving this future under four focus areas: liveable, sustainable, productive and collaborative.

The draft CSP includes the following nine objectives:

- Strong communities, desirable lifestyle
- Celebrated creativity, culture and learning
- Protected and valued natural environment
- Sustainable living
- Vibrant and diverse economy
- Responsible and balanced development
- Connected and accessible places
- Collaborative and engaged community
- Innovative and proactive leadership.



## Eurobodalla Settlement Strategy 2006

The [Eurobodalla Settlement Strategy](#) provided a blueprint for the growth of the Eurobodalla Shire up to 2031. In relation to economic development, the Settlement Strategy outlined a preferred hierarchy of commercial centres in Eurobodalla, identified a number of opportunities for expansion of industrial lands (including at Moruya North and Dalmeny) and provided a number of actions to facilitate and support nature-based and rural area tourism. The Strategy also recognised the importance of agriculture, aquaculture and resource extraction as key economic activities that need to be protected and promoted.

## Town Centre Structure Plans Batemans Bay (2008), Moruya (2007) and Narooma (2005)

Supporting the Eurobodalla Settlement Strategy are a number of [Structure Plans](#) for the major towns in the Eurobodalla Shire – Batemans Bay, Moruya and Narooma. The Structure Plans provide an analysis of the current and possible future functions of the town centres and their precincts and outline a range of urban design and built form controls to guide development outcomes.

## Business Development Strategic Plan 2014-2018

The Eurobodalla Shire [Business Development Strategic Plan](#) outlines the following four strategic themes for business growth:

- Growth from within Eurobodalla
- Eurobodalla – ‘Open for business’
- Developing new opportunities
- Collaboration and partnerships

Within these four themes, 32 actions have been identified and 12 marked for priority action, including the following:

- Investigate opportunity to increase the amount of local procurement by Council
- Continue with initiatives to maintain vibrant and attractive CBDs
- Pursue employment generating opportunities (eg. airport redevelopment, industry sector development)
- Establish an internal economic development reference group.

## Eurobodalla Destination Management Plan 2011-2020 and draft Action Plan 2017-2020

Council’s [Destination Management Plan 2011-2020](#) is currently under review and a new Destination Action Plan will prioritise actions for the next four years. The aim of the draft Eurobodalla Destination Action Plan 2017 to 2020 is to strengthen the Eurobodalla visitor economy by increasing visitor expenditure by 25%, increasing overnight visitor stays by 25%, and encouraging visitor dispersal across the year and the Shire. This will be achieved by Council and industry working cooperatively to develop and promote Eurobodalla and its towns and villages as important destinations in NSW, increasing visitor awareness and satisfaction, attracting new investment for infrastructure, and integrating tourism across Council strategic planning initiatives.

## Eurobodalla Draft Events Strategy 2016-2022

Council’s draft Events Strategy includes the following actions:

- developing new and supporting existing events, including through seed funding and working with business and industry associations, such as Chambers of Commerce
- assisting event organisers in a range of ways including with grant applications, guidance with operational and approval processes, helping develop partnerships, marketing advice and advocating to ensure any required infrastructure is in place
- developing an annual events calendar and updating the ‘Whats On’ section of Council’s website.

## Eurobodalla Draft Digital Economy Strategy 2017

Council developed a Digital Economy Strategy in 2012 in anticipation of the roll-out of the National Broadband Network and is currently revising that strategy. With the roll-out of the NBN, Eurobodalla will become a more informed, connected and digitally active community with thriving on-line businesses and digitally improved medical and education sectors. The revised digital economy strategy will provide guidelines for Eurobodalla residents and businesses to maximise use of high speed broadband and to enable the community to embrace the future digital economy with confidence.

## Eurobodalla Draft Creative Arts Action Plan 2017

Council is currently drafting a Creative Arts Action Plan with the aim to make Eurobodalla a premier arts destination in NSW, building upon the strong local arts base that currently exists in Eurobodalla. One of the key actions to be included in the Action Plan is to grow the Basil Sellers competition to a nation-wide art prize.

## Economic Development and Employment Lands Strategy 2011

In 2011, Council adopted an [Economic Development and Employment Lands Strategy](#), focused on the opportunities for providing additional employment lands in Eurobodalla.

The Strategy identified eight sites across Eurobodalla that could be further investigated for potential future employment development. Three of these areas, which adjoin the three major towns in the Shire, were identified for growth in small-scale commercial development. A planning proposal to implement this recommendation of the Strategy has since been completed.

The Moruya North Industrial Expansion area was also identified in the Strategy with recommendations to advance this proposal, including the need for more detailed investigations into development feasibility. The first feasibility study into the environmental impacts of development has been completed and work is now underway on an economic feasibility study.

## Eurobodalla Rural Lands Strategy 2016

In 2016, Council adopted a [Rural Lands Strategy](#) to facilitate growth in the rural economy. The Strategy identifies that Eurobodalla is predominantly a part-time commercial agriculture area than a full-time one and therefore makes recommendations to support growth in small-scale agriculture and facilitate value-adding opportunities for existing rural enterprises.

A [planning proposal](#) to implement the recommendations of the Rural Lands Strategy relating to the Eurobodalla Local Environmental Plan 2012 has been prepared. The planning proposal will facilitate additional permitted uses in rural areas and additional rural subdivision and rural living opportunities.

## Infrastructure Driving the NSW Economy 2015

Investment in infrastructure is key to developing an environment that is conducive to economic growth. In 2015, Council prepared '[Infrastructure Driving the NSW Economy](#)', to outline a list of infrastructure requirements that will support economic growth in Eurobodalla, including the following:

- Princes Highway upgrades
- Kings Highway B-double access
- Batemans Bay Marina development and other marine infrastructure
- Moruya Regional Airport
- Local and regional road and bridge improvements, including the South Batemans Bay Link Road
- Public transport facilities
- Water and sewerage infrastructure
- Upgrades to major recreation facilities
- New arts and cultural infrastructure
- A new Emergency Operations Centre
- Tourism infrastructure, including walking and cycling trails

The Infrastructure Driving the NSW Economy report is a living document used to advocate for infrastructure funding and is updated on an as-needs basis.



## Business Association Strategic Plans

The Batemans Bay Chamber of Commerce and Industry has recently completed their Strategic Plan outlining the following six strategic directions:

- promote Batemans Bay as the designated commercial hub and preferred tourist destination on the NSW Far South Coast
- support for business growth through collaboration, professional development, promotion and partnerships
- growth in membership viability and diversity
- building strategic and collaborative relationships
- leadership through best-practice governance, communication, representation and event planning
- identify opportunities for expanding resources, source funding and broadening business diversity and emerging trends to enhance growth.

The Moruya Chamber of Commerce Strategic Plan outlines a vision to create a vibrant Moruya – a great place to live, work and do business; and to maximise opportunity for economic development and employment growth that is appropriate to our cultural and natural environment. One of the key projects that has resulted from the Strategic Plan is Moruya Matters – a buy local community development initiative.

The Narooma Chamber of Commerce is currently working with community members to develop a Narooma Economic Development Plan building upon previous strategic work.

## South East Food Plan 2012

The [South East Food Plan](#) was a community led project to grow the regional food economy. The Plan is being implemented by SCPA – South East Producers – through a range of actions including the following:

- collaborations with Sustainable Agriculture and Gardening Eurobodalla (SAGE) and Permaculture eXchange
- information distribution through SCPA News
- education courses through SCPA Education, the National Environment Centre and Bega TAFE
- collaborations with local government on food safety workshops
- operating and promoting local food markets
- supporting and promoting shop-based providers who source local produce
- assisting producer collaboration
- promoting local producers at local events.







## Appendix 2: Economic snapshot of Eurobodalla

### Population growth

Eurobodalla's population is expected to grow from the 2016 level of 37,769 by 0.85% per annum over the forecast period to 44,774 by 2036. This compares well to the Canberra Region Joint Organisation area average of 1.03% growth per annum over the same period, considering the regional area includes the high growth rate LGAs of Yass Valley at 2.49% and Queanbeyan-Palerang at 1.51%.

Eurobodalla has a high percentage of residents over 65, at 29.1%, almost double the NSW average of 15.7%. One consequence of this is that as the population is ageing into retirement faster than the population is growing, Eurobodalla's labour force (number of people of working age, 15 to 65) has started falling. The size of the available labour force peaked around 21,600 in 2011, and since then has been falling by around 100 people per year. This brings challenges for employers in Eurobodalla who are looking to increase the size of their workforce.

### Gross regional product

Gross regional product (GRP) for Eurobodalla is forecast to grow at an average rate of 2.4 per cent per annum to 2035, that is, at a slightly lower rate forecast for NSW at 2.7 per cent. Construction, health and social assistance, and accommodation and food services are likely to grow at a slightly faster rate than other industries in Eurobodalla.

The trend in GRP from 2001 to 2015 shows a steady increase leading up to the 2007 GFC, followed by much slower annual growth since then. Drivers of industry GRP growth have been construction, retail trade, education and training, and health services and social assistance.

GRP in the Eurobodalla is forecast to decline slightly over the period to 2020 before growth commences once more, suggesting that the short to medium term will be a period of consolidation rather than high growth. The initial decline is as a result of the macro-economic circumstances for Australia generally following the global financial crisis, the end of the mining investment boom, declining terms of trade and household expenditures curtailed by high levels of household debt and the tightening of government expenditures.

### Household income

Household disposable income grew strongly over the 20 years to 2015, averaging growth of 3.8% per annum. With lower rates of GRP growth forecast, household disposable income will also grow more slowly over the next 20 years, expecting to increase at an average rate of 2.6% per annum.

### Employment and unemployment

Industry employment is forecast to grow from the current level of 15,708 jobs in Eurobodalla, by an average of 1.27% per annum to 2036. This growth rate is above the average annual growth rate for 2001-15 of 1.09%.

Eurobodalla's unemployment rate is currently around 7%, above the NSW average of 4.9%. The trend over the eight years from 2010 shows a peak of just under 12% in late 2014. Within the long term cycles there is a seasonal pattern showing lower unemployment rates in the summer peak holiday season and high rates in winter.

### Industry structure – job numbers & value

The top contributors to GRP formation in the Eurobodalla Shire in 2015 were the health and social assistance, construction, retail, accommodation and food services, and education sectors. The health care and social assistance sector has steadily grown its employment in Eurobodalla, rising from around 1,050 in 1995 to 1,850 in 2015. Education sector employment has also grown significantly rising from 670 local employment positions in 1995 to 1,150 in 2015. The largest declines in employment over the last decade have been in the construction and retail sectors.

## Appendix 3: 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. For example, operators of tourist accommodation need electricians and plumbers and other trade and specialist services. To get this message out, Council runs a 'Tourism is everyone's business' campaign to highlight that almost 3700 residents are directly or indirectly employed in tourism in Eurobodalla. A strong tourism economy also brings social and environmental benefits to the local community.

In terms of the local tourism economy, the challenge for Eurobodalla businesses is capturing more local value while continuing to attract more visitors from interstate and overseas and developing appropriate leisure opportunities for higher spending visitors. This process does not particularly require large amounts of investment that will make Eurobodalla look like everywhere else. It is likely that high value tourists are looking for a unique experience and in a place of natural beauty, so these things should be valued.



### 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.

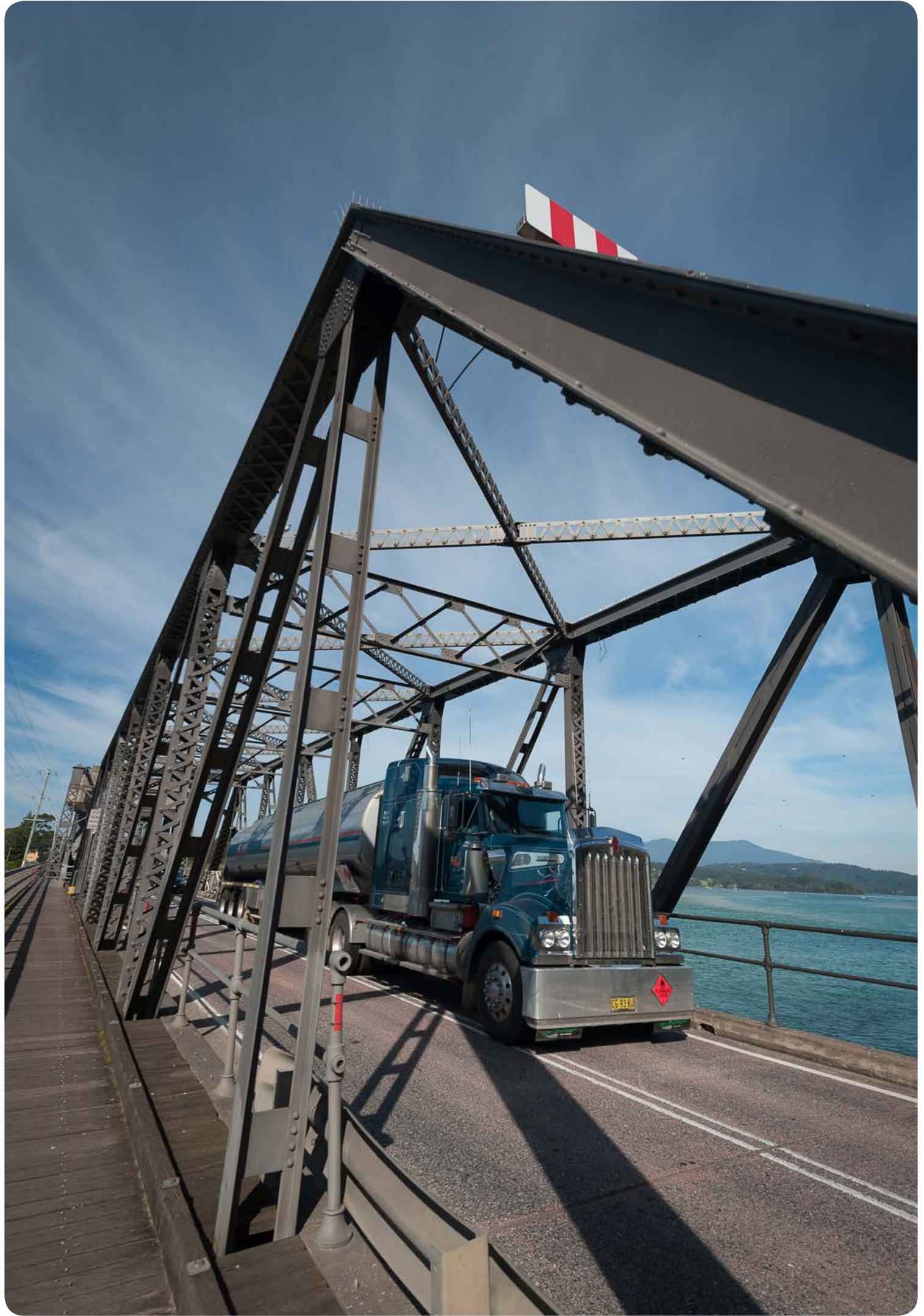
## Manufacturing

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.





Front cover image Josh Burkinshaw