

TRANSPORT LANDSCAPE AND CONNECTIONS ANALYSIS

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

JUNE 2020

This Report was commissioned by Regional Development Australia Far South Coast Inc. (RDA FSC) utilising funding from the Regional Employment Trials program 2020. RDA FSC appointed the Western Research Institute (WRI) to conduct the analysis and prepare the following Report.

The Western Research Institute (WRI) is a not for profit company limited by guarantee that is focused on supporting regional areas of Australia to ensure they remain vibrant and sustainable. Our offices are in Bathurst, NSW where we have operated since 1998.

RDA FSC and WRI acknowledge the traditional custodians of the Country where we live and work. We pay our respects to Elders of past, present and future and acknowledge the connections and contribution to land, sea and community.

RDA FSC thanks the Board and staff of WRI, Eurobodalla Shire Council, Shoalhaven City Council, Bega Valley Shire Council and all the participants in the consultation processes for assistance in the preparation of the report.

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Prepared for Regional Development Australia Far South Coast

20 009 Final RDA FSC Report June 2020

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EXECUTIVE SUMMARY

The Transport Landscape and Connections Analysis Project was commissioned by Regional Development Australia Far South Coast (RDA FSC) after receiving funding through the Regional Employment Trials Program under the Australian Government Department of Education, Skills and Employment.

The project aimed to identify and establish the extent of specific issues regarding the transport offerings in the study region comprising the Shoalhaven, Eurobodalla and Bega Valley Local Government Areas and to identify opportunities to improve access to employment and build connectivity between employers and job seekers as well as enabling access to educational pursuits.

The research methodology consisted of desktop research, stakeholder interviews, a transport audit of services and two surveys.

The desktop research into the labour market across the Far South Coast region found that the unemployment rate is consistently higher in each of the LGAs than Regional NSW and NSW overall. The northern portion of the Far South Coast region forms part of the Southern Highlands and Shoalhaven Region. This region recorded a youth unemployment rate (aged 15-24 years) of 20.1% which is the highest of all the regions, 4.3 percentage points higher than the next closest region. The southern areas of the Far South Coast region fall into part of the Capital Region which recorded a youth unemployment rate of 9.7%.

The stakeholders reported overwhelmingly that transport was a factor that impacted the ability for the region's residents to access employment, education and training.

The most common reason given was the patchy nature of public transport across the region. The data gathered during the transport audit and desktop research supported these comments, with infrequent bus services available in many areas and a strong reliance on car transport for travel to work and training. The number of buses registered and their underutilisation across the region was noted during the research.

A recommendation for better coordination across existing services and improved utilisation of existing resources could supplement current public transport services and provide an alternate source of transport for those needing access to work or study.

The need for a driver's licence was highlighted by the majority of the stakeholders, as an essential requirement for employment and it was noted that many younger people and those in the lower socio-economic groups were unable to access their driver's licence or had limited means to pay for vehicles or fuel to traverse the distances required to get to work and training.

Data from the Roads and Maritime Service indicates that the numbers of people across the region with a driver's licence is comparable to Regional NSW. The data did not drill into a sufficient level to solve the anomaly of stakeholders identifying access to a driver's license as a key challenge in the region versus the reasonable level of driver's licenses being issued in the region. Therefore, a recommendation is made that the employment agencies gather information, when their client interactions resume normal access levels as COVID-19 isolation restrictions are lifted, to specifically identify the areas and job seekers who are compromised in their occupational pursuits because of a lack of a driver's licence. This information will assist in the implementation of the recommended driver's licence access program designed to address this key issue.

Other recommendations from the project are:

- Future planning of jobs creation and education course design to consider transport solutions. This could be achieved via an annual planning sessions with key stakeholders to identify where jobs creation and

course delivery planning needs to incorporate transport solutions to ensure the programs are successful to build skills and create jobs in the Far South Coast region.

- Build on the experience of working from home in the COVID-19 isolation period to change how people work and train. More training and working from home opportunities to improve work and training outcomes and reduce reliance on transport options. This could include supervision of apprentices in the practical component of their courses being delivered locally rather than having to travel significant distances, including as far as Wollongong for some course sessions. It could also include working with businesses to consider flexibility in start and finish times for workers so that in peak holiday periods they avoid the pinch points on the road networks.
- Businesses leading flexible transport solutions for their recruits. Identify best practice solutions that solve transport issues with effective engagement of workers. Picking up on some business's solutions of supporting car-pooling and offering company vehicles may benefit other businesses ability to attract and train workers who are challenged by transport options limitations.

More details on the recommendations and associated actions are provided in the conclusions and recommendations section of the report.

Transport Audit

The transport audit provided the following information:

The road network is the most important transport infrastructure in the Far South Coast region. Councils reported key pinch points on the road networks associated with peak holiday traffic and limits associated with B-Double access on some routes.

The number of new vehicle registrations has remained at almost the same levels as they were ten years ago.

Vehicle registration data indicates that there are more than 700 small buses, almost 500 people movers and over 620 buses in the Far South Coast region.

Vehicle registrations across the region have increased by 70% in the last decade, however, the population of the region only increased by 8% over the same time period. Passenger vehicles increased at a much lower rate than trucks.

Public transport in the Far South Coast region is mostly limited to buses with the South Coast Line of the Sydney Intercity Train Network terminating at Bomaderry in the Shoalhaven area.

Inter regional and interstate bus services connect the region to Canberra, Sydney and Melbourne daily. Local bus services provide school services as well as additional routes in some areas.

The region is serviced by two public airports, Moruya Airport and Merimbula Airport which provide connecting services to Sydney and Melbourne. The airports are critical for flying in legal and health professionals to service the region as well as management and executives of large business and government organisations that utilise the airport to link to Sydney and Melbourne.

Over 70% of people travel to work using a car.

Transport Issues

A key aim of the project was to identify if transport was an issue limiting employment and access to education and training in the Far South Coast region. Interviews with stakeholders and feedback from surveys of businesses and job seekers provided the following insights:

Stakeholders agreed that transport was an issue impacting employment and access to education and training in the Far South Coast region.

Public transport was identified as the largest issue impacting employment, education and training.

The car is the most common form of transport in the region and that a driver's licence was important to enable access to employment, education and training.

The absence of a driver's licence was a significant issue amongst many young people and the lower socio-economic groups within the region.

On demand services were seen as a solution to transport issues in some parts of the region. Different models were offered as a solution including flexi buses, on demand buses and ride sharing models.

Successful programs operating in the region have transport solutions built into the delivery. It was noted that if transport is not considered from the early planning stages, then a program may not be as successful.

Public transport was identified as the largest issue impacting employment, education and training. The aspects of public transport included:

- The limited availability of public transport across the region
- The frequency and timing of the current services
- The need to use smaller buses to service the region
- The cost of public transport
- The need to increase the awareness and promotion of public transport.

INTRODUCTION

Regional Development Australia Far South Coast (RDA FSC) commissioned the Western Research Institute (WRI) to assess the transport landscape in the Shoalhaven, Eurobodalla and Bega Valley local government areas (LGAs) within the context of the implications and impacts transport linkages have with access to employment, education and training. The project was funded under the Regional Employment Trials program by the Federal Department of Education, Skills and Employment.

RDA FSC identified that in various recent research pieces, transport was identified as a limiting factor for local employment and access to training. The project aimed to establish the extent and specific issues regarding the transport offerings in the 3 LGAs that make up the study region and to identify opportunities to improve access to employment and build connectivity between employers and job seekers as well as enabling access to educational pursuits.

Research

The project was conducted utilising a comprehensive research program that included:

- Assessment of the current jobs market including a review of job vacancy data and analysis of labour market data to identify trends and areas of jobs growth
- A transport infrastructure audit including desktop research, interviews within each of the three LGAs, data collected from the three LGAs and vehicle sales data
- Consultation with 78 people in 22 stakeholder interviews, 6 group interviews with 22 participants and online surveys of the business sector and residents seeking employment or enrolled in education and training.

The report summarises the main findings from the research and provides a series of recommendations. The Appendices contain the detailed information from the transport audit, maps of the main transport infrastructure in the region, summaries of the interviews with each of the councils, a summary of the consultations and results of the surveys.

Geographic areas used in the report

As part of the analysis, data was reported at the LGA level wherever possible, to reflect the 3 regions within the study area.

Where this was not possible, the data was reported at Australian Bureau of Statistics (ABS) Statistical Area Level 4 (SA4) level or Statistical Area Level 2 (SA2) level or at the smallest area possible within the dataset. Statistical Areas are defined in the Australian Statistical Geography Standard and a summary of what each Statistical Area means and how they relate to each other is provided below. A comparison was also provided with Regional NSW where the data was available.

Australian Statistical Geography Standard defined geographic¹ areas:



- SA1 – the smallest unit for the release of Census data - between 200 and 800 people with an average population size of 400. Data releases at this level may be limited to preserve confidentiality.
- SA2 – Whole SA1s are aggregated to reflect SA2s. SA2s are medium sized areas that represent a community that engages socially or economically. Census data is available for SA2s and is the smallest data sets for information including Estimated Residential Population and Health and Vitals statistics. These areas are generally populated by 3,000 – 25,000 people with an average of 10,000 persons each. Local government areas align to the SA2 boundaries in many cases.
- SA3 – these are aggregations of SA2s. They are designed to represent areas of regional outputs. Generally, the population of SA3 is between 30,000 to 130,000. In regional areas, SA3s are the area serviced by a regional city or town that has a population of over 20,000 people. These areas are designed to reflect a regional identity with similar geographic and socio-economy characteristics. In many cases they align to existing administrative boundaries, such as State Development Areas of one or more local government area.
- SA4s – Built from whole SA3s, these are the largest sub-State regions in the Australian Statistical Geography Standard. ABS Labour Force survey data is reported at this level and the territories represent labour markets or groups of labour markets within the State. They were developed to reflect 2 geographic components – where people live (labour market supply) and where they work (labour market demand). SA4s have a minimum population of 100,000 persons up to a maximum of 500,000. In regional areas the population for SA4s tends towards the minimum level.

¹ Source: 1270.0.55.001 - Australian Statistical Geography Standard (ASGS): Volume 1 - Main Structure and Greater Capital City Statistical Areas, July 2016

EMPLOYMENT PROFILE

Estimated Resident Population - June 2019



Source: Australian Bureau of Statistics, Estimated Resident Population, Cat. No: 3218.0, June 2019

Estimated Resident Population - June 2019

Bega Valley
Shire Council



Eurobodalla
Shire Council







Shoalhaven
City Council



Source: NSW Department of Planning, Industry and Environment, Population Projections, 2019

Age Distribution - 2016

	 Median Age	 0-14 years	 65 + years	 ATSI
Bega Valley Shire Council	51	15.8%	25.9%	3.1%
Eurobodalla Shire Council	54	14.3%	30.6%	5.6%
Shoalhaven City Council	48	16.4%	26.4%	5.5%
Regional NSW	43	18.3%	20.4%	5.5%
NSW	38	18.5%	16.3%	2.9%

Source: Australian Bureau of Statistics, Census 2016, REMPLAN, id consulting

Jobs

13,975

Bega Valley
Shire Council

14,243

Eurobodalla
Shire Council

35,751

Shoalhaven
City Council

Industries total employment



Bega Valley Shire Council Top 5 industries

1. Cheese and Other Dairy Product Manufacturing - 652
2. Hospitals (except Psychiatric Hospitals) - 468
3. Supermarket and Grocery Stores - 458
4. Aged Care Residential Services - 424
5. Accommodation - 415

Eurobodalla Shire Council Top 5 industries

1. Aged Care Residential Services - 552
2. Supermarket and Grocery Stores - 504
3. Local Government Administration - 446
4. Accommodation - 430
5. Cafes and Restaurants - 406

Shoalhaven City Council Top 5 industries

1. Defence - 1,654
2. Aged Care Residential Services - 1,273
3. Hospitals - 1,213
4. Supermarket and Grocery Stores - 1,184
5. Cafes and Restaurants - 997

Source: Australian Bureau of Statistics, Census 2016

Occupations



Bega Valley Shire Council Top 5 occupations

1. Sales Assistants and Salespersons - 1,142
2. Hospitality, Retail and Service Managers - 752
3. Carers and Aides - 689
4. Health Professionals - 641
5. Education Professionals - 624

Eurobodalla Shire Council Top 5 occupations

1. Sales Assistants and Salespersons - 1,008
2. Carers and Aides - 680
3. Hospitality, Retail and Service Managers - 651
4. Health Professionals - 647
5. Education Professionals - 559

Shoalhaven City Council Top 5 occupations

1. Sales Assistants and Salespersons - 2,863
2. Health Professionals - 1,959
3. Carers and Aides - 1,922
4. Hospitality, Retail and Service Managers - 1,723
5. Education Professionals - 1,616

Source: Australian Bureau of Statistics, Census 2016

Education



Percentage of population above 15 years

Bachelor or
Higher degree

15.0%

Bega Valley
Shire
Council

13.4%

Eurobodalla
Shire
Council

8.3%

Shoalhaven
City
Council

21.1%

Regional
NSW

14.5%

NSW

23.4%

Advanced Diploma
or Diploma

8.3%

8.3%

8.5%

8.2%

8.9%

Vocational

23.8%

24.5%

25.8%

23.6%

18.1%

No qualification

39.7%

40.1%

40.4%

41.7%

39.1%

Source: Australian Bureau of Statistics, Census 2016

JOBS MARKET

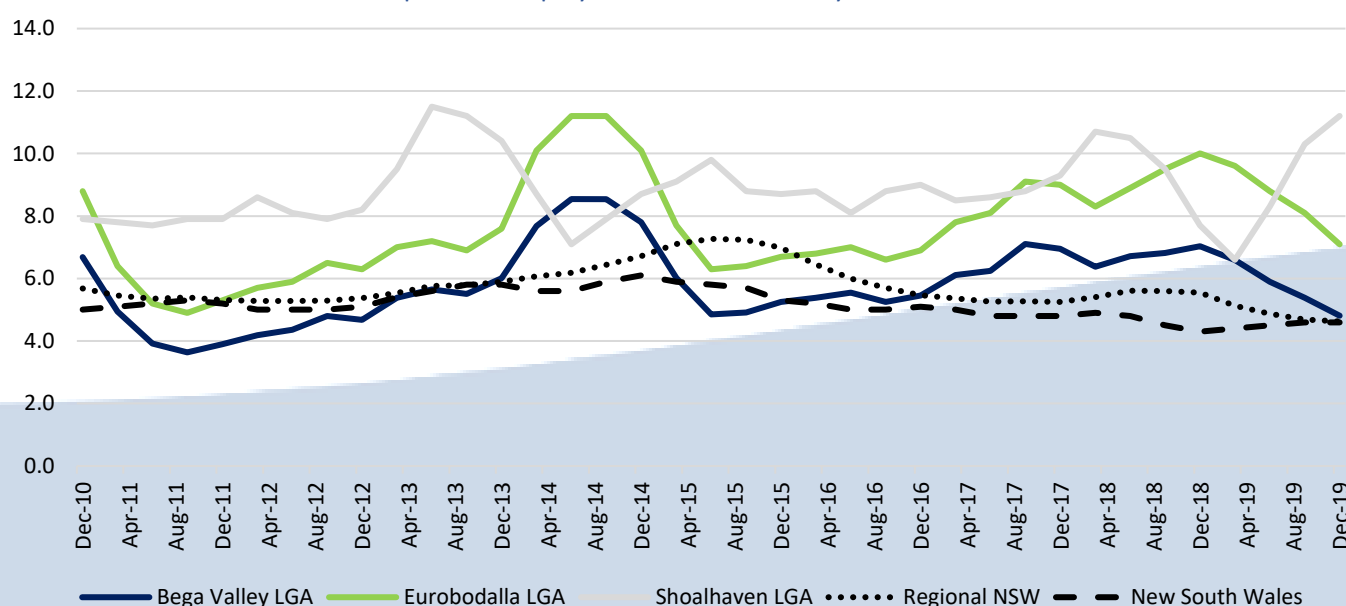
An assessment of the jobs market including recent trends was undertaken as part of the project.

It should be noted that 2020 has experienced some extraordinary events which have impacted jobs markets and employment broadly, especially the Far South Coast region including bushfires, floods and the COVID-19 pandemic. Wherever possible, the latest data has been provided with historical data to give a more balanced understanding of the jobs market across the region. Additionally, secondary data that was collected has been supplemented by commentary and feedback collected from stakeholders during the interviews.

Unemployment

The unemployment rate across the 3 LGAs in the Far South Coast region has been consistently higher than the rate for both Regional NSW and NSW over the last two years. Graph 1 below shows the unemployment rate for the Bega Valley, Eurobodalla and Shoalhaven LGAs over the last decade with a comparison to Regional NSW and NSW. It should be noted that data from the Small Area Labour Markets is volatile, and the analysis below should be taken into consideration when reviewing this data. It is useful to consider this data source when viewing regional information to see how the individual LGAs in the study area have recorded movements in the unemployment rate over time.

Graph 1: Unemployment Rate - Quarterly - 2010 - 2019



Department of Education, Skills and Employment, Small Area Labour Markets, December 2019

Over the last 12 months, the unemployment rate fell in the Bega Valley LGA (7.0% in the December quarter 2018 to 4.8% in December quarter 2019) and the Eurobodalla LGA (10.0% in the December quarter 2018 to 7.1% in December quarter 2019) though both remain higher than the rate for Regional NSW and NSW (4.6% December quarter 2019).

The unemployment rate is higher in the Shoalhaven LGA with the rate rising between the December quarter 2018 (7.7%) and December quarter 2019 (11.2%). The rate declined from a high in the March quarter 2018 of 10.7% to a low of 6.6% in the March quarter 2019, however has risen steadily again through 2019.

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It is also noted that the level of capital expenditure in a local government area will impact on unemployment figures at a local level, as temporary and short-term jobs are created and then end. Further, the seasonality of jobs in sectors including tourism, which is a significant employer across the Far South Coast region, will also have a significant impact on the quarterly unemployment rates.

With the noted volatility in this data, it is best to consider the unemployment data over time.

The Compound Annual Growth Rate (CAGR) is a widely used measure of growth used to evaluate fluctuations in data. The CAGR calculations for the Far South Coast region are shown in Table 1 below.

Table 1: Compound Annual Growth Rate of unemployment:
2010 to 2019 Far South Coast region

Region	CAGR Unemployment Rate
Shoalhaven City Council	4.0%
Eurobodalla Shire Council	-2.4%
Bega Valley Shire Council	-3.6%
Regional NSW	-2.3%

Source: Department of Education, Skills and Employment, Small Area Labour Markets, December 2019, WRI Calculations

The CAGR for the period between December 2010 and December 2019 for unemployment rate for Shoalhaven LGA is positive while the other regions are negative. This means that unemployment increased in Shoalhaven LGA over the period and unemployment decreased in the other regions.

It is expected that the unemployment rate for the Far South Coast region will increase in the March quarter 2020 when the impacts of the recent drought, fires, floods and COVID-19 restrictions are recorded.

Stakeholders interviewed supported the concern of increasing levels of unemployment reporting that the region's visitor economy has been particularly impacted by COVID-19 restrictions and fires, and it is expected that many small businesses may take a long time to return to recent employment levels. The reduction in employment levels is likely to be in industries that support part time, female and younger workers.

Youth Unemployment

Youth unemployment is not reported at a local government level. The latest information published in the Labour Market Information Portal is the youth unemployment rate at the SA4 level. The Far South Coast region is located across two SA4 regions.

The northern portion of the Far South Coast region forms part of the Southern Highlands and Shoalhaven Region SA4. This region recorded an overall unemployment rate of 7.4% and a youth unemployment rate (aged 15-24 years) of 20.1% in April 2020. This unemployment rate is the highest of all the regions reported, both in overall unemployment, but especially youth unemployment which is 4.3 percentage points higher than the next region.

The southern areas of the Far South Coast region fall into part of the Capital Region SA4. This region recorded an overall unemployment rate of 3.9% and a youth unemployment rate (aged 15-24 years) of 9.7%.

Table 2: Youth unemployment rate – SA4 level

Unemployment rate April 2020	15+ years	Youth (15-24 years)
Capital Region	3.9	9.7
Central Coast	4.9	9.7
Central West	3.3	9.6
Coffs Harbour - Grafton	5.4	12.1
Far West and Orana	2.5	6.5
Hunter Valley excluding Newcastle	4.4	9.5
Illawarra	6.5	15.8
Mid North Coast	7.1	15.8
Murray	4.7	8.1
New England and North West	5.1	12.6
Newcastle and Lake Macquarie	4.9	11.7
Richmond - Tweed	4.1	9.8
Riverina	4.5	4.6
Southern Highlands and Shoalhaven	7.4	20.1
Greater Sydney	4.6	10.3
New South Wales	6.0	10.7

Source: Australian Government, Labour Market Information Portal, June 2020

Internet Vacancy Index

The Internet Vacancy Index is published as part of the Australian Government's Labour Market Information Portal and contains detailed data on online job vacancies, including approximately 350 occupations for all states and territories and 37 regions. Map 1 shows the regions for NSW. The Index provides a current position on jobs being advertised across a range of services and serves as an indication of the position of the regional jobs market in the study region.

The Far South Coast region is encompassed in two regions, the Illawarra and South Coast region as well as the Southern Highlands and Snowy region.

The Internet Vacancy Index is based on a count of online job advertisements newly lodged on SEEK, CareerOne and Australian JobSearch during the month. As such, the Internet Vacancy Index does not reflect the total number of job advertisements in the

Map 1: Regions used in the Internet Vacancy Index



Source: Australian Government, Labour Market Information Portal, June 2020

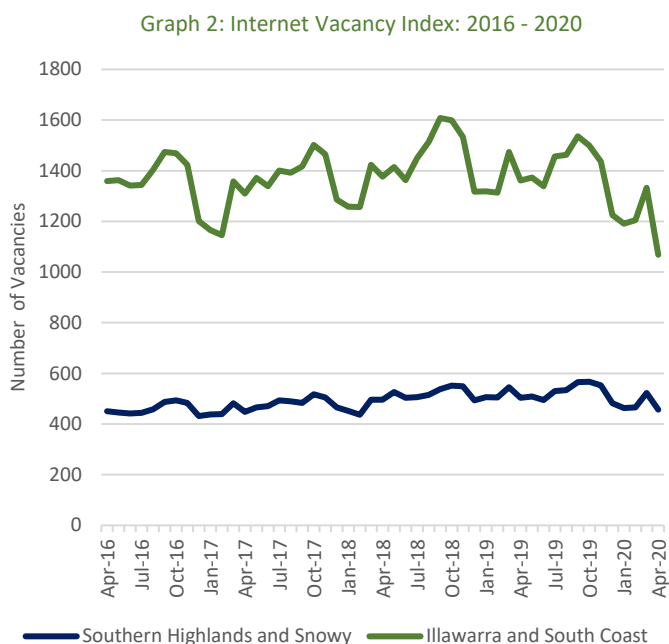
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jobs market as it does not include jobs advertised through other online job boards, employer websites, word of mouth, in newspapers and advertisements in shop windows. The Internet Vacancy Index also does not take account of multiple positions being advertised in a single job advertisement.

Graph 2 shows the Internet Vacancy Index for the Illawarra and South Coast region and the Southern Highlands and Snowy region for the April 2016 to April 2020 period.

Noting the seasonal nature of the tourism sector in the Far South Coast economy, the peaks in the vacancy rate occur in the September / October period to accommodate the increased demand in visitors for the busy summer holiday period.

The Internet Vacancy Index rate fell sharply in April 2020 in line with COVID-19 restrictions being implemented across the economy, however the rate of decline was smaller in the Southern Highlands and Snowy region. The rate of change over the last five years and the previous 12 months is shown in Table 3.



Source: Australian Government, Labour Market Information Portal, June 2020

The Internet Vacancy Index rate increased in the Southern Highlands and Snowy region by 22% over five years compared to 2% in the Illawarra and South Coast region and 15% for Regional NSW. NSW overall declined by 9% over the same period. Over the last 12 months, the Internet Vacancy Index has fallen sharply, however the rate of decline was less significant in the Southern Highlands and Snowy region (-9%) than the Illawarra and South Coast region and Regional NSW (both -22%). NSW declined by 36% in the last 12 months.

Table 3: Internet Vacancy Rates – Change

	Change Dec-15 to Dec-19	Change Apr 19 - Apr 20
Southern Highlands and Snowy	22%	-9%
Illawarra and South Coast	2%	-22%
Regional NSW	15%	-22%
NSW	-9%	-36%

Source: Australian Government, Labour Market Information Portal, June 2020

Internet Vacancy Index – Occupation vacancies

The Internet Vacancy Index tracks vacancies at the occupancy level. To provide a snapshot of the types of vacancies in each of the regions, the top 10 vacancies were examined at 4 different times over the last 18 months.

The Far South Coast region is encompassed by two regions. The northern part of the Far South Coast region is covered by the Illawarra and South Coast region (see Map 1). In the Illawarra and South Coast region there is consistently positions available in various health occupations including:

- medical practitioners and nurses
- health diagnostic and therapy professionals
- carers and aides.

There are also positions available for automotive and engineering trade workers.

The peak period for vacancies occurs each year in the September-October period catering for increased demand in the summer holiday jobs.

During September 2019, positions associated with seasonal work increased including:

- hospitality, retail and service managers
- sales assistants and salespersons
- food trades workers
- hospitality workers (outside the top 10 however this area increased in September quarter).

The April 2020 period showed a decline in overall vacancies, however the demand for health workers remained strong.

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Table 4: Internet Vacancy Index: December 2018 to April 2020 – Top 10 job results for selected periods

ILLAWARRA AND SOUTH COAST								
	Dec-18		Sep-19		Dec-19		Apr-20	
1	General Inquiry Clerks, Call Centre Workers, and Receptionists	99	Medical Practitioners and Nurses	123	Medical Practitioners and Nurses	102	Medical Practitioners and Nurses	109
2	Medical Practitioners and Nurses	93	General-Inquiry Clerks, Call Centre Workers, and Receptionists	99	Health Diagnostic and Therapy Professionals	101	General-Inquiry Clerks, Call Centre Workers, and Receptionists	84
3	Carers and Aides	85	Health Diagnostic and Therapy Professionals	91	General-Inquiry Clerks, Call Centre Workers, and Receptionists	99	Carers and Aides	80
4	Automotive and Engineering Trades Workers	71	Carers and Aides	87	Carers and Aides	97	Health Diagnostic and Therapy Professionals	62
5	Sales Assistants and Salespersons	64	Sales Assistants and Salespersons	62	Legal, Social and Welfare Professionals	59	Legal, Social and Welfare Professionals	56
6	Health Diagnostic and Therapy Professionals	63	Legal, Social and Welfare Professionals	60	Automotive and Engineering Trades Workers	55	Sales Assistants and Salespersons	55
7	Food Trades Workers	56	Automotive and Engineering Trades Workers	59	Food Trades Workers	47	Other Labourers	38
8	Business, Finance and Human Resource Professionals	48	Hospitality, Retail and Service Managers	53	Sales Assistants and Salespersons	45	Automotive and Engineering Trades Workers	38
9	Other Labourers	48	Food Trades Workers	42	Business, Finance and Human Resource Professionals	39	Hospitality, Retail and Service Managers	33
10	Hospitality, Retail and Service Managers	45	Other Labourers	38	Hospitality, Retail and Service Managers	35	Sales Representatives and Agents	32
	TOTAL	1,318		1,536		1,226		1,068

Source: Australian Government, Labour Market Information Portal, June 2020

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The southern part of the Far South Coast region is contained in the Southern Highlands and Snowy region (See Map 1) there is also an overall demand for various health workers including:

- medical practitioners and nurses
- health diagnostic and therapy professionals
- carers and aides.

There was also positions available for automotive and engineering trade workers across all periods taken in the snapshot.

The September to October period was also a peak period in the Southern Highlands and Snowy region although there was less monthly change compared to the Illawarra and South Coast Region. During September 2019, positions associated with seasonal work increased for occupations of:

- hospitality, retail and service managers
- sales assistants and salespersons
- food trades workers.

Table 5: Internet Vacancy Index: December 2018 to April 2020 – Top 10 jobs results for selected periods

SOUTHERN HIGHLANDS AND SNOWY								
	Dec-18		Sep-19		Dec-19		Apr-20	
1	Carers and Aides	42	Carers and Aides	46	Medical Practitioners and Nurses	42	Medical Practitioners and Nurses	45
2	Medical Practitioners and Nurses	40	Medical Practitioners and Nurses	42	Carers and Aides	36	Carers and Aides	38
3	General-Inquiry Clerks, Call Centre Workers, and Receptionists	28	General-Inquiry Clerks, Call Centre Workers, and Receptionists	34	Sales Assistants and Salespersons	26	Health Diagnostic and Therapy Professionals	30
4	Sales Assistants and Salespersons	26	Sales Assistants and Salespersons	32	Health Diagnostic and Therapy Professionals	25	Sales Assistants and Salespersons	28
5	Automotive and Engineering Trades Workers	25	Health Diagnostic and Therapy Professionals	29	Food Trades Workers	23	General-Inquiry Clerks, Call Centre Workers, and Receptionists	24
6	Food Trades Workers	24	Automotive and Engineering Trades Workers	29	Automotive and Engineering Trades Workers	22	Legal, Social and Welfare Professionals	23
7	Legal, Social and Welfare Professionals	21	Legal, Social and Welfare Professionals	26	General-Inquiry Clerks, Call Centre Workers, and Receptionists	20	Other Labourers	23
8	Health Diagnostic and Therapy Professionals	18	Food Trades Workers	25	Business, Finance and Human Resource Professionals	17	Hospitality, Retail and Service Managers	17
9	Other Labourers	18	Hospitality, Retail and Service Managers	23	Legal, Social and Welfare Professionals	15	Automotive and Engineering Trades Workers	16
10	Hospitality, Retail and Service Managers	17	Business, Finance and Human Resource Professionals	19	Cleaners and Laundry Workers	15	Drivers and Store persons	16
Total		493		565		482		457

Source: Australian Government, Labour Market Information Portal, June 2020

jobactive caseload

jobactive is the Australian Government's employment program. It connects job seekers with employers and is delivered by a network of jobactive providers in over 1,700 locations across Australia. (www.employment.gov.au/jobactive). The Labour Market Information Portal collects and reports information on the caseloads of the jobactive providers on a quarterly basis. The results for the Capital Region and the Illawarra South Coast Region with a comparison to national data, is provided in Table 6.

The jobactive caseload overall fell by 6% in the Capital Region and by 5% in the Illawarra South Coast Region between December 2018 and December 2019, which is a slightly greater rate than the national decline which recorded a 3% fall. The jobactive caseload has increased sharply in the last quarter, 7% in the Capital Region and 6% in the Illawarra South Coast Region, however this has been at a much lower rate than the national increase of 23%.

A similar trend was recorded for the youth caseload. The Capital Region recorded a decline of 12% over 2019 in jobactive youth caseload, the Illawarra South Coast Region and national decline was 4%. Over the last quarter, nationally the number of youth jobactive cases rose by 25%, however, the number increased by 12% in the Capital Region and 10% in the Illawarra South Coast Region.

Table 6: jobactive Caseload: December Quarter 2019 – March Quarter 2020

	CAPITAL REGION				ILLAWARRA SOUTH COAST REGION				NATIONAL	
	Dec Qtr 19	Mar Qtr 20	Change Dec 18- Dec 19	Change Dec 19 - Mar 20	Dec Qtr 19	Mar Qtr 20	Change Dec 18- Dec 19	Change Dec 19 - Mar 20	Change Dec 18- Dec 19	Change Dec 19 - Mar 20
Total (15+ years)	7,858	8,399	-6%	7%	13,574	14,351	-5%	6%	-3%	23%
Youth (15-24 years)	1,323	1,483	-12%	12%	2,466	2,709	-4%	10%	-4%	25%
Mature Age (50+ years)	2,039	2,085	-6%	2%	4,466	4,531	-3%	1%	-1%	14%
Indigenous (15+ years)	797	847	5%	6%	1,838	1,960	6%	7%	4%	9%
People with a Disability (15+years)	2,134	2,165	-5%	1%	3,980	3,969	-3%	0%	3%	5%
Refugee (15+ years)	394	405	-5%	3%	357	371	8%	4%	-2%	7%

Source: Australian Government, Labour Market Information Portal, June 2020

Employment growth by industry

Industry growth by region is published as part of the Labour Market Information Portal and the results for the South Highlands and Shoalhaven Region and the Capital Region as well as a comparison for NSW are shown in Table 7. Overall, employment growth is projected to be lower than the rate for NSW overall in both the Southern Highlands and Shoalhaven Region and Capital Region.

The projected growth sectors for the Southern Highlands and Shoalhaven Region include:

- Health Care and Social Assistance
- Other Services
- Administrative and Support Services.

The projected growth sectors for the Capital Region are in:

- Accommodation and Food Services
- Health Care and Social Assistance
- Other Services (see breakout box for definition of Other Services).

This is consistent with the jobs vacancy data published in the Internet Vacancy Index data which shows consistent demand in the health care sectors and seasonal demand in visitor economy related sectors.

The sectors expected to decline in the Southern Highlands and Shoalhaven Region include:

- Agriculture, Forestry and Fishing
- Mining

Sectors expected to decline in the Capital Region include:

- Wholesale Trade
- Professional, Scientific and Technical Services.

Australian and New Zealand Standard Industrial Classification (ANZIC)

DIVISION 5: OTHER SERVICES (ABS)

The Other Services Division includes a broad range of personal services; religious, civic, professional and other interest group services; selected repair and maintenance activities; and private households employing staff. Units in this division are mainly engaged in providing a range of personal care services, such as hair, beauty and diet and weight management services; providing death care services; promoting or administering religious events or activities; or promoting and defending the interests of their members.

Also included are units mainly engaged in repairing and/or maintaining equipment and machinery (except ships, boats, aircraft, or railway rolling stock) or other items (except buildings); as well as units of private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of households.

The Other Services Division excludes units mainly engaged in providing buildings or dwellings repair and maintenance services (included in the Construction or Administrative and Support Services Divisions as appropriate), and units mainly engaged in providing repair and maintenance services of books, ships, boats, aircraft or railway rolling stock (included in the Manufacturing Division).

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Table 7: Employment projections: 2019 to May 2024 by industry

	Southern Highlands and Shoalhaven Region	Capital Region	NSW
Agriculture, Forestry and Fishing	-8.1	1.0	-3.0
Mining	-3.3	7.9	-3.4
Manufacturing	9.2	2.0	-2.6
Electricity, Gas, Water and Waste Services	-0.7	3.9	1.6
Construction	0.8	2.4	10.4
Wholesale Trade	1.3	-8.6	2.0
Retail Trade	7.0	1.3	6.2
Accommodation and Food Services	6.4	19.8	10.9
Transport, Postal and Warehousing	3.9	3.8	7.1
Information Media and Telecommunications	-3.0	11.6	-1.9
Financial and Insurance Services	0.0	0.0	4.5
Rental, Hiring and Real Estate Services	-0.4	-2.4	10.5
Professional, Scientific and Technical Services	8.9	-3.3	16.1
Administrative and Support Services	11.4	11.9	8.6
Public Administration and Safety	3.9	9.9	6.5
Education and Training	10.7	4.4	12.6
Health Care and Social Assistance	18.9	17.0	16.7
Arts and Recreation Services	5.7	-2.1	10.7
Other Services	12.9	14.7	7.2
All Industries	8.1	7.6	9.0

Source: Australian Government, Labour Market Information Portal, June 2020

Location of business

An analysis of the location of businesses across the Far South Coast Region was undertaken at the SA2 level which allows for a more detailed view across the region. The data was then collated into the main urban centres. A map showing the SA2 regions is available in Appendix 3.

The ABS Count of Australian Business reports that the majority of business across the Far South Coast Region are sole traders or owner operators, i.e. non-employing businesses, which is a typical profile in regional areas.

The major urban centres of Nowra, Ulladulla and the broad Shoalhaven Bay and Basin communities recorded the largest number of businesses across the Far South Coast Region. The Berry-Kangaroo Valley area is a popular visitor destination with a high number of accommodation, food and shopping outlets.

Table 8: Count of Business – Far South Coast Region 2019

	Non employing businesses	1-4 employees	5-19 employees	20-199 employees	200+ employees	Total
Ulladulla	3,517	2,537	1,985	1,776	1,760	1,760
Nowra	1,254	740	331	109	3	2,412
Shoalhaven Bay and Basin	1,140	651	210	27	0	2,104
Berry - Kangaroo Valley	572	303	116	6	0	993
Batemans Bay	641	350	141	35	0	1,198
Narooma	389	215	89	11	0	701
Merimbula	510	353	140	25	0	1,010
Eden	713	327	104	12	0	1,169
Bega	390	239	101	15	3	742
Moruya-Tuross-Broulee	716	382	127	27	0	1,238

Source: 8165.0 Counts of Australian Businesses, including Entries and Exits, June 2015 to June 2019

Travel to Work

The Far South Coast region, similar to many regional areas in Australia, covers a large area and stretches almost 400 kilometres from north to south.

An analysis of travel to work data from the 2016 Census is provided in Table 9. The data was analysed at an SA2 level and collated to the major urban settlement. Maps showing the SA2 regions are located in Appendix 3. The columns represent the place of work and are the main urban settlements within the region. The rows represent the residence of the person travelling to work.

People across the study area travel significant distance to work.

The data indicates that people travel significant distances between urban centres for work each day. For example, 364 people travel approximately one hour from the Ulladulla region to Nowra for work. A large number of people travel from Eden (1,391) and 70 travel from Narooma to Bega for work. Batemans Bay attracts 205 people from Ulladulla and 12 people from Eden.

Table 9: Travel to Work: Place of work by Place of residence Far South Coast SA2 Region

		PLACE OF WORK							
PLACE OF RESIDENCE		Eden	Bega	Merimbula	Narooma	Batemans Bay	Moruya - Tuross Head - Broulee	Nowra	Ulladulla
	Ulladulla	-	4	-	-	205	22	364	4,721
	Nowra	-	-	-	-	3	4	8,058	31
	Shoalhaven Bay and Basin	-	-	-	-	7	3	4,023	174
	Berry - Kangaroo Valley	-	-	-	-	-	-	769	3
	Batemans Bay	-	-	3	13	3,873	502	13	38
	Narooma	-	70	6	2,059	47	181	-	4
	Merimbula	242	764	2,574	-	-	5	-	-
	Eden	1,013	1,391	650	122	12	7	-	-
	Bega	34	2,756	278	9	-	-	3	-
	Moruya-Tuross-Broulee	-	12	-	213	1,014	2,549	9	20

Source: Australian Bureau of Statistics, Census 2016, TableBuilder

TRANSPORT AUDIT

An audit of transport infrastructure was conducted across the 3 LGAs. Information was collected from each of the councils as well as desktop research. This has been supplemented with commentary provided by stakeholders during the interviews.

A summary of the information collected is provided as a Transport Summary in Appendix 1. Maps showing the key rail, road and air infrastructure is provided in Appendix 3.

Road infrastructure

The Far South Coast Region covers over 14,000 square kilometres of coastal land and stretches more than 400 kilometres from Berry in the north to the NSW / Victoria border in the south. A map depicting the region is shown opposite.

The Princes Highway, which links Sydney and Melbourne, passes through the region and is the main transport corridor. The region is connected to Canberra via main roads from Nowra, Batemans Bay and Bega with the Kings Highway being the major transport link for the southern communities.

Interviews with councils provided background on the importance of the road networks to the economy. Eurobodalla Shire Council noted that the region was reliant on the Kings Highway and the Princes Highway for the visitor economy which generated approximately one third of their gross regional product.

Eurobodalla Shire Council also noted that B-Double access was restricted to the region which limited supply chains and investment. Shoalhaven City Council also commented on B-Double access to the region particularly to the west connecting to Canberra and markets further south.

The Bega Valley Shire Council commented that maintaining the road networks were a priority for the region with only one road in and out in many areas. This was highlighted during recent summer bushfires when areas were cut off for extended periods of time.

Councils were asked as part of the transport audit to highlight the pinch points in the road networks. Congestion across the region was largely associated with seasonal visitors. Other pinch points in the road networks were due to heavy vehicle limits to the south and west of the Far South Coast Region and heavy vehicle congestion at Mount Ousley at Wollongong to the north of the region. A list of the key pinch points provided by each of the councils is included in the Transport Summary in Appendix 1.

Map 1: Far South Coast Region



Source: Regional Development Australia Far South Coast

Total vehicle registrations

The number of total registered vehicles across the Far South Coast Region has increased by 70% in the last decade. Over the same time period, the population of the Far South Coast region has increased by 8%. Table 10 across provides a breakdown of total vehicle registrations for each local government area in the study region with a comparison to Regional NSW and NSW overall.

The rate of increase of passenger vehicles over the last 10 years is at a significantly lower rate than for light and heavy trucks. Despite the lower rate of growth in passenger vehicles, the growth rate was still higher than the population growth in each of the 3 local government areas.

The importance of road infrastructure as the main transport connection, is also highlighted by the significant growth in the number of both light and heavy trucks across the region over the last 10 years. There has been substantial growth in the numbers of registered light and heavy trucks in each of 3 local government areas between 2010 and 2019.

Table 10: Vehicle Registrations

	Number of Registrations as at 31 December 2019	Growth 2010-2019
Total registered vehicles		
Bega Valley Shire Council	42,657	73%
Eurobodalla Shire Council	48,438	68%
Shoalhaven City Council	122,765	69%
Regional NSW	3,233,016	60%
NSW	6,613,939	53%
Passenger vehicles		
Bega Valley Shire Council	12,265	8%
Eurobodalla Shire Council	15,364	12%
Shoalhaven City Council	41,083	13%
Regional NSW	1,132,599	8%
NSW	2,950,531	12%
Light trucks		
Bega Valley Shire Council	6,607	82%
Eurobodalla Shire Council	6,370	82%
Shoalhaven City Council	15,957	92%
Regional NSW	448,254	72%
NSW	747,120	64%
Heavy trucks		
Bega Valley Shire Council	714	45%
Eurobodalla Shire Council	753	94%
Shoalhaven City Council	1,660	65%
Regional NSW	60,155	43%
NSW	103,802	40%

Source: Transport for NSW, Vehicle Registrations, Accessed June 2020

New vehicle registrations

Whilst the rate of total vehicle registrations has increased substantially over the last decade, the number of new vehicle registrations has remained at almost the same levels as they were ten years ago with the number falling over the last 3 years.

The graphs opposite shows the level of new vehicle registrations in total and for passenger vehicles for each of the three councils between 2010 and 2019.

Table 11 below provides a comparison of new vehicle registrations for Bega Valley Shire, the Eurobodalla Shire and the Shoalhaven City areas as well as Regional NSW and NSW overall.

Whilst new registration numbers for all vehicles has risen in each of the LGAs over the last decade, the increase has been less than for both Regional NSW and NSW overall.

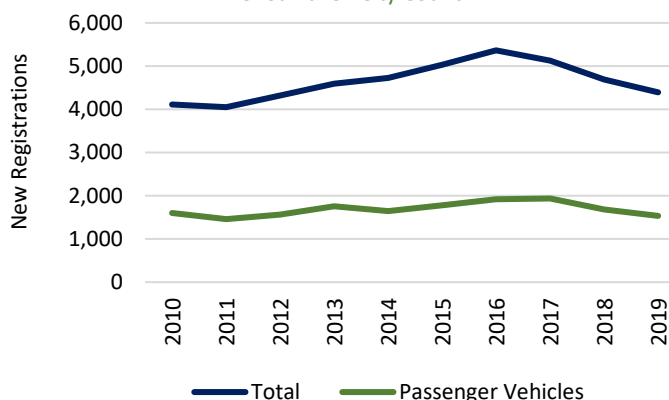
For passenger vehicles, new registrations have declined between 2010 and 2019 in each of the three council areas. However, new registrations for passenger vehicles have increased in Regional NSW and NSW overall, albeit at a lower rate than for all vehicles.

Table 11: Total Vehicle Registrations

	New Registrations 2010 - 2019	
	All Vehicles	Passenger Vehicles
Bega Valley Shire Council	7%	-1%
Eurobodalla Shire Council	4%	-4%
Shoalhaven City Council	7%	-4%
Regional NSW	11%	6%
NSW	9%	5%

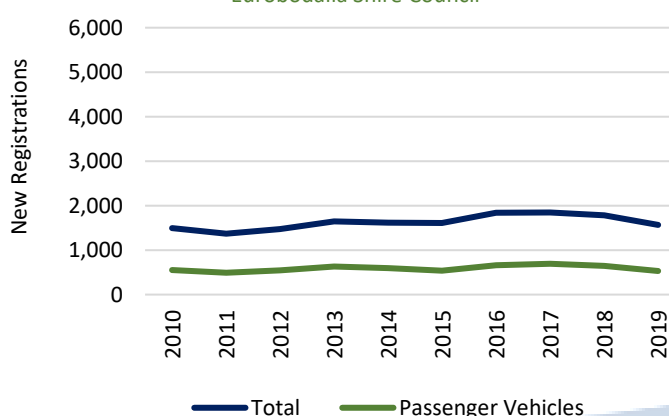
Source: Transport for NSW, Registration Statistics, accessed June 2020

Graph 3: New vehicle registrations 2010 - 2019 - Shoalhaven City Council



Source: Transport for NSW, Registration Statistics, Accessed June 2020

Graph 4: New vehicle registrations 2010 - 2019 - Eurobodalla Shire Council



Source: Transport for NSW, Registration Statistics, Accessed June 2020

Graph 5: New vehicle registrations 2010 - 2019 Bega Valley Shire Council



Source: Transport for NSW, Registration Statistics, Accessed June 2020

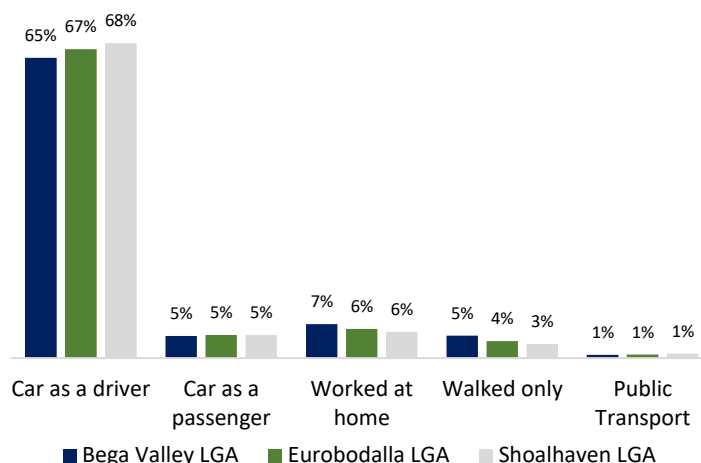
Mode of transport to get to work

With the noted importance of the road network, the region has a strong reliance on the car for travel to work, education and training. Over 70% of residents of the region reported using the car as a driver or a passenger to travel to work in the 2016 Census.

This was supported by commentary provided by stakeholders during the interviews. Shoalhaven City Council reported that the South Coast relies on having a private car and that frequently many of the cars on the road were people travelling to work.

The reliance on the car for travelling to work or education was also noted during the stakeholder interviews. The Employment Agencies commented that a car is needed to access work in the region and representatives from within councils also noted that car use was the primary method of travel across the region.

Graph 6: Travel to Work



Source: Australian Bureau of Statistics, Census 2016

Public transport

Public transport is largely limited to buses across the Far South Coast region. The South Coast Line of the Sydney Intercity Train Network terminates at Bomaderry. There are 17 services on this line, Monday to Friday to and from Sydney and 12 services on weekends and public holidays. The number of monthly trips on the South Coast Line is provided in the Transport Summary in Appendix 1.

Stakeholders interviewed reported that the train service was used by students travelling to university and TAFE in Wollongong and a small number of commuters. Additionally, stakeholders reported that the service is used for residents, largely in the northern part of the region, to travel to appointments in Wollongong and Sydney and for connections to Sydney Airport. Transport for NSW indicated that a feasibility study was being conducted into the Canberra to Eden railway line to investigate the potential of opening a freight and passenger rail line to connect Canberra to the Port of Eden.

The main form of public transport throughout the Far South Coast region is buses. The audit of bus services across the region identified numerous private operators in each of the council areas providing services in and around the localities within each region. Additionally, inter regional and interstate bus services connect the region to Canberra, Sydney and Melbourne daily. A list of bus services is provided in the Transport Summary in Appendix 1.

Local bus services are provided as school services with additional routes and services connecting outlying communities with the main shopping, education and health facilities daily. The frequency, timing and routes were questioned by a number of stakeholders with many suggesting that these factors prevented widespread use of the buses.

The Eden-Bega Flexi-Bus which is an on demand bus service was also referred to by a number of stakeholders during the interviews. The service has been a trial project funded by Transport for NSW, running between Bega and Eden with bookings taken via an online system.

Bus registrations

The number of buses, both large and small, was mentioned during the interviews with councils. The number of registrations of small buses, people movers and buses are provided in the table opposite for each of the council areas

The Bega Valley Shire had 434 registered small buses, people movers and buses at the end of 2019, Eurobodalla Shire 509 and Shoalhaven City 1,702.

The numbers of small buses increased in the Bega Valley Shire and Eurobodalla Shire between 2010 and 2019, however, declined in the Shoalhaven City area. Small buses declined by 17% across Regional NSW over the same time period.

People movers have increased substantially across Regional NSW (90%) over the last decade. The number of people movers increased by 56% in the Bega Valley LGA, the Eurobodalla LGA by 74% and the Shoalhaven LGA by 89% over the same time period.

The number of buses increased significantly in the Shoalhaven area between 2010 and 2019. In the Eurobodalla area the number of buses grew by 7% however in the Bega Valley area the number of buses declined. Regional NSW reported an increase in buses of 22% between 2010 and 2019.

Table 12: Bus registrations

	Number of registrations as at 31 December 2019	Growth 2010-2019
Small Buses*		
Bega Valley Shire	126	8%
Eurobodalla Shire	153	1%
Shoalhaven City	430	-13%
Regional NSW	9,913	-17%
NSW	18,417	-36%
People Movers**		
Bega Valley Shire	214	56%
Eurobodalla Shire	249	74%
Shoalhaven City	801	89%
Regional NSW	21,076	90%
NSW	61,527	69%
Bus		
Bega Valley Shire	94	-1%
Eurobodalla Shire	107	7%
Shoalhaven City	471	120%
Regional NSW	7,368	22%
NSW	14,111	16%

*Small Bus - Motor vehicles that are built to carry people, seat more than 6 persons (including the driver) and weigh up to 4.5 tonnes GVM. Includes passenger vans but excludes people movers.

**People Mover - Motor vehicles that are built to carry people, seat 6 to 8 passengers (including the driver)

Source: Transport for NSW Vehicle Registrations, Accessed June 2020

Air services

The Far South Coast region is serviced by two public airports, Moruya Airport and Merimbula Airport. Shoalhaven City has two defence airports, HMAS Albatross and the Jervis Bay Range Facility.

In 2015, Eurobodalla Shire Council adopted a Master Plan for Moruya Airport which has resulted in Council receiving funding commitments of \$7.1 million from the NSW and Australian Governments to undertake major redevelopments. Moruya Airport has 3 daily passenger services to Sydney and recorded 21,200 regular passenger transit movements in 2018- 19.

The Merimbula Airport Master Plan was adopted by Bega Valley Shire Council in 2014. The implementation of the Master Plan has resulted in funding being awarded to develop the general and commercial aviation precinct (\$4.62 million) and the upgrading of the passenger terminal (\$1.2 million). Merimbula Airport has 3 daily services to Sydney each weekday and 2 services on a weekend. There are also 9 services directly to Melbourne each week. In 2019, Merimbula Airport recorded 60,905 regular passenger transit movements.

Stakeholders highlighted the importance of the airports in flying in workers, especially in the legal and health sectors. Bega Valley Shire Council commented that there is an increasing reliance on the Merimbula Airport for legal practitioners and health workers to service the region. Eurobodalla Shire Council also noted that air services were essential for medical services especially to service the Eurobodalla Regional Hospital.

Further, Bega Valley Shire Council staff indicated that management and executives of large business, including Bega Cheese which has offices in Melbourne, as well as government organisations utilise the airport to link to Sydney and Melbourne. Eurobodalla Shire Council noted that the recent shutdowns due to COVID-19 had impacted services at the airport. Further, the airport is essential to service the visitor economy across the region. In 2015, Tourism Research Australia data indicated that 163,000 domestic overnight visitors and 9,000 international tourists travelled to the South Coast region by air. This represents approximately 5% of all visitors to the region.

Community transport

Transport for NSW reports that community transport services are locally based in communities and assist people experiencing transport disadvantage, including:

- people who are financially disadvantaged, isolated, lack public transport or have a mobility impairment
- older people who are frail and their carers
- people with disabilities and their carers.

In the Far South Coast region, community transport services are provided by Eurobodalla Shire Council within their area and by independent organisations in the Shoalhaven and Bega Valley areas. A summary of the services is provided in the Transport Summary in Appendix 1.

Other transport

- **Taxis:** Each of the council areas has a number of taxi providers servicing the local region
- **Active Transport:** Councils noted that active transport including pedestrian and cycling infrastructure was an integral part of the transport network. However, Eurobodalla Shire Council and Bega Valley Shire Council commented that the active transport networks were limited in their shires, and that they were seeking solutions to upgrade and improve the coverage throughout their areas.

TRANSPORT ISSUES

A key aim of the project was to identify if transport was an issue limiting employment and access to education and training in the Far South Coast region. Additionally, if transport was an issue, the project sought to clarify what aspects of transport were the issue and how did these limit employment and access to education and training.

In addition to the desktop research and data analysis undertaken and presented in the employment job market analysis and transport audit, 22 individual and 6 group interviews were conducted to collect feedback and provide commentary on the key issues affecting the Far South Coast region. A complete list of stakeholders interviewed is provided in Appendix 5.

Two surveys were also undertaken. The first was a survey of the business chambers across the region and other key businesses and organisations as identified by the RDA FSC. The second was a survey of employees and those attending education and training. The results of the surveys are provided in Appendix 6.

This section summarises the findings from the interviews as well as the data collected in the surveys.

Table 13: Key transport issues

Summary of Issues	Stakeholders
Transport as a barrier	28
Driver's licences	25
Availability of public transport	22
Frequency or timing of current bus services	16
Use of smaller buses	10
Rail services	9
On-demand services	8
Uber / Fruber / Ride Sharing / Car pooling	7
Delivery of transport outside of core service	5
Cost of public transport	4
Active transport	3
Community transport	3
Education in the region	3
Freight	3
Long distances	2
Parking	2
Promotion / awareness of public transport	2
Sustainability	1

Transport as a barrier

All of the stakeholders interviewed agreed that transport was an issue impacting employment and access to education and training in the Far South Coast region.

There was a similar response with surveys. The business survey respondents were asked to rate the impact of a series of transport issues on employment, education and training. All of the transport issues were given a rating above 50 out of 100 which indicates relative significance.

The employees survey, whilst small in responses, reported similar findings with the majority of respondents indicating that transport issues had prevented them from attending a job interview or employment or from getting to training or education. The low response rates were attributed by the employment agencies who assisted in circulating the surveys, to the lock down conditions in place during the survey period.

Public transport

Public transport was the most commonly raised issue in interviews with stakeholders. Only 3 of the stakeholder interviews did not mention public transport within the region during the discussions. The key area of concern with regard to public transport are summarised below.

The limited availability of public transport across the region

Stakeholders referred to the lack of public transport options across the region. It was noted by 7 stakeholders that the train line finished at Bomaderry which resulted in limited access to Sydney for the majority of residents of the region. Stakeholders commented that if the rail line was extended this could provide additional commuter access up and down the coast and facilitate an increase in visitors to the region by rail.

“Lack of public transport outside of the school buses in many areas and many of the school buses do not allow anyone else on them” Employment Agency

The business survey respondents rated train services timetables as the seventh most important transport related issue (out of 8 issues) to impact employment and access to education and training in the Far South Coast region. The respondents were also asked if they had any suggestions that would improve transport to get to work or education and training in their region. An extended rail line was provided as a suggestion by 2 respondents.

Stakeholders commented that public transport buses became less frequent as you travel further from Wollongong and that outside of the school buses there was very limited access to buses in many parts of the region. It was also noted that where school bus travel was an option, they did not run on weekends or during school holidays which also placed limits on its usefulness as a source of travel for work.

The business survey respondents rated adequate public transport options as the second highest transport related issue to impact employment and the highest transport related issue impacting access to education and training in the Far South Coast region.

Frequency and timing of the current services

In addition to the commentary on the lack of public transport services across the region, there was also discussion about the frequency and timing of the services that are available. Sixteen of the stakeholder interviews reported that there were problems with the timing and number of services currently available or the routes provided.

The key issues raised within this section were:

- Public transport timetables do not suit the current hours of both the university and TAFE campuses across the region. It was reported that there are few services available to each of the different campuses and that the services that are available are offered at times that do not suit the timetables of students. This was particularly a concern for students that are attending courses in the evening.
- There are localised bus services to many of the smaller communities across the region. Stakeholders commented that these services were infrequent, with many only operating once or twice a day. In addition, the services were slow compared to car travel often taking more than double the travel time. These issues present difficulties for people seeking transport to work, especially shift or casual work.
- There was commentary about the school bus services as a means of transport to work or education and training, with different opportunities available across the region. Stakeholders reported that whilst these services are available in some areas, the school buses run at set times and do not service many of the areas that people need to access for employment, such as the industrial areas and hospitals.
- Stakeholders commented that the bus network did not support the nature of work across the region, including casual, part-time and shift work. In areas with a large visitor economy such as seen in the study region, significant numbers of jobs are part time and casual which require greater flexibility in transport timetabling.

“Many of the smaller villages in the Bega Valley only have 1 bus per day – doesn’t correlate with working hours”

Employment Agency

“Young trainees working in construction start at 7am, cafe workers have staggered shifts, childcare workers start early. Without flexible public transport workers in these industries are unable to get to work due to the travel distances required”

Business Survey Respondent

The business survey respondents rated bus services timetables as the sixth most important transport related issue (out of 8 issues) to impact employment and the fifth most important transport related issue (out of 8 issues) impacting access to education and training in the Far South Coast region. The business survey respondents were also asked how they would improve transport infrastructure for work or training across the region. The most frequent response was to provide more bus services or services at better times.

Respondents to the employees survey also commented that the timing of the buses prevented them from attending their employment and that the timetables were too erratic. The respondents were also asked if they had any suggestions that would improve transport to get to work or education and training in their region. The most frequent response was to provide additional buses, longer routes or more frequent services.

Use of smaller buses

Stakeholders discussed the idea of smaller buses on shorter loops rather than big buses on longer routes that currently service much of the region. Ten of the 28 stakeholder interviews suggested that this would be a better model of service delivery. Different options were suggested by those interviewed included a hub and spoke model, shuttle buses and on demand services. Eurobodalla Shire Council commented on the number of buses across the region and the underutilisation of many of these services.

The business survey respondents were also asked how they would improve transport infrastructure for work or training across the region. The second most frequent response was to provide additional smaller or shuttle bus services.

Cost of public transport

Four stakeholders commented on the cost of public transport for the users especially for students attending university or TAFE and for the lower income earners. There was some suggestion that subsidies could assist with improving the number of people utilising some of the services.

Respondents in the employees survey also commented that cheaper fares on public transport would improve transport to get to work or education and training.

Awareness and promotion of public transport

Two stakeholders commented that there was a lack of awareness within the community about the availability of the bus services and with some promotion, the patronage could increase which may improve public transport viability in the region. A business survey respondent suggested that a campaign to improve the perception of public transport, especially amongst young people, could also assist with higher rates of use.

Driver's licences

The car is the most common form of transport across the Far South Coast region for transport to work according to data collected at the 2016 Census. Over 70% of residents across the region reported travelling to work by car either as a driver or passenger.

Stakeholders interviewed during the project supported this data and commented that the car was essential for employment in the region. The importance of a driver's licence was raised by 25 of the 28 stakeholder groups with most commenting that amongst young people and the lower socio-economic groups within the region, the absence of a driver's licence was a significant issue.

The key issues related to driver's licences raised by the stakeholders included:

- The lack of driver's licences in sections of the community is creating generational disadvantage as it limits the ability for the people to access work and education. Whilst this was a frequently raised comment, driver's licence data provided by the Roads and Maritime Service indicates that licences for the region are at a comparable rate to that for Regional NSW and NSW (Table 14 below).
- It was noted that many households do not have the capacity to supervise 120 hours of driving practice for a number of reasons including access to cars, access to people in their household with a driver's licence and the cost of petrol.
- The existence of fines is preventing people from applying for a driver's licence. There are programs in place to address this including Work Development Orders, however, it was noted that the current system of fines present an issue in gaining or maintaining a driver's licence.
- Many of the key employment industries across the region require a driver's licence as a condition of employment, including aged care and construction.
- It was noted by 2 stakeholders that the large scale road construction projects currently underway in the Shoalhaven region are employing some young people, including apprentices and trainees, however, as they are located away from the main urban centres, employees need a driver's licence.

"Difficulty in getting to Nowra to undertake the driver's test for both Ls and Ps. Also, the cost involved is often too high for the lower income groups."

Business Survey Respondent

Stakeholders discussed a range of programs that are being delivered across the region to increase access to driver's licences by young and disadvantaged people across all regions. These included (more details are provided in case studies in the solutions outside core business section below):

- Y-Drive Run by Eurobodalla Shire Council and helps disadvantaged young people in the Shire build up the 120 hours of driving experience they need to get their P-plates (provisional driver's licence).
- D-Lap – Driver Licencing Access Program - This program assists Aboriginal and other disadvantaged people to get and keep their driver's licence and remain safe and legal drivers.
- PCYC Safer Drivers Course – This is available in Nowra. The cost is \$140 and provides 20 log book hours. Participants must have completed 50 hours of driver training before attending the course.
- Department of Premier and Cabinet Roadshows had been held in previous years across the region. These were a multi-agency forum to assist people accessing government services including Driver's Licences.

It was also noted by the stakeholders, that once a driver's licence was obtained, there was still an ongoing issue relating the cost of purchasing a car, the ongoing maintenance and petrol costs, all of which also contributed to the inability of people to get to work or education.

The business survey respondents rated people who don't have driver's licences as the third most important transport related issue (out of 8 issues) to impact employment and the sixth most important transport related issue (out of 8 issues) impacting access to education and training in the Far South Coast region.

Licence data from the Roads and Maritime Service statistics are shown in Table 14. The table shows the percentage of people with a driver's licence per population aged over 15 years of age. The data indicates that all 3 areas in the Far South Coast region have a lower rate of Learner's permits as well as Provisional licences than for Regional NSW and NSW. However, the rate of overall unrestricted licences was higher than for both Regional NSW and NSW overall.



CASE STUDY

A report released by the Brotherhood of St Laurence in 2016 reported that:

- Among unemployed people under 25 a substantial 61% don't hold a licence, according to Household Labour Income and Family Dynamics in Australian (HILDA) data from 2012.
- While the high proportion is partly explained by the minimum driving age – between 16 and 18 – the percentage of jobseekers with no licence in the 18 to 25 group is still 41%, compared to 19.9% of jobseekers aged 25-54 years.

Proportion of people with no driver's licence (%) 2012

	Under 25 years	25-54 years
Unemployed	61.0	19.9
Employed	27.4	4.6

Source: Brotherhood of St Laurence, My Chance, Our Future Youth Employment campaign, 2016

Table 14: Driver's Licence as a percentage of the population aged 15 years and over – December 2019

PRIMARY LICENCE TYPE					
	All	Learner	P1	P2	Unrestricted
Bega Valley	96.8%	2.7%	1.9%	3.2%	89.1%
Eurobodalla	99.4%	2.8%	2.0%	3.1%	91.5%
Shoalhaven	93.2%	3.0%	1.8%	3.2%	85.2%
Regional NSW	90.4%	3.5%	2.1%	3.7%	81.1%
NSW	86.1%	4.7%	2.1%	3.7%	75.6%

Source: Transport for NSW, Roads and Maritime Licensing Statistics, December Quarter 2019, NSW Department of Planning, Industry and Environment, Population Projections 2019, WRI Calculations

Notes: P1. Provisional 1, P2 Provisional 2 and Unrestricted – full Driver's Licence

On demand services

There was discussion amongst the stakeholders about the provision of on demand transport solutions with 12 out of the 28 stakeholders discussing options across the region.

Bega-Eden Flexi Bus

The Bega-Eden Flexi Bus is an on demand bus service which has been operating in the Bega Valley region since November 2018 with mixed reports on the success of the program. The project is funded by Transport for NSW and provides connections between Eden, Bega, Merimbula and Pambula.

"Maybe there needs to be some training of local people about the flexi-bus and what it has to offer"

Stakeholder

Stakeholders reported mixed opinions on the Flexi Bus project, however, most indicated that this type of service was needed and that a comprehensive evaluation examining the problems and the benefits of the project needed to be undertaken. More consultation around the routes, timings and frequency of the Flexi Buses as well as the effectiveness of the online booking system need to be included in any reviews. Stakeholders also indicated that more promotion of the service could increase the patronage.

Other on demand buses

Stakeholders provided a number of other examples of on demand bus services that were operating in other regional centres and recommended that these could be examined for implementation in the Far South Coast region. These included:

CASE STUDY

On Demand services for Moree began in November 2018. The trial services include an on demand service and a twice daily route service. The service can pick people up at or near their homes and drop them off at the desired destination within Moree. The On demand service must be pre-booked by text or phone call and operates 7 days a week, excluding public holidays from 7am-7pm. The twice daily route service, 7:35am and 6:05pm connects the Moree Train station with selected points within Moree.

<https://transportnsw.info/travel-info/ways-to-get-around/on-demand/moree>



ARDI Source: Armidale Express

CASE STUDY

A driverless shuttle trial, the Armidale Regional Driverless Initiative (ARDI) was completed in February 2020, operating in the CBD of Armidale. The shuttle was the first vehicle to operating in mixed traffic within a city centre and had one of the longest (5 km) and most complex trial routes. Night time services were undertaken.

TfNSW identified additional trial sites for the vehicle are likely. The service was free to passengers and was a joint initiative of the NSW Government, Armidale Regional Council, EasyMile Transdev, WSP, QBE Insurance, Edwards Coaches and the University of New England.

<https://www.iothub.com.au/news/driverless-shuttle-now-taking-passengers-in-armidale-cbd-532825>

<https://www.transport.nsw.gov.au/news-and-events/media-releases/driverless-shuttle-ardi-says-goodbye-to-armidale>

<https://transportnsw.info/travel-info/ways-to-get-around/bus/automated-vehicle-trials>

CASE STUDY

Busabout is a family owned business that has been operating public transport and charter services since 1951. They currently employ over 250 staff and operate over 180 buses on scheduled routes and school services across NSW. They provide connections to the rail network, major employment centres, schools and shopping centres, transporting several million passengers a year. Additional services operate on weekdays and Saturdays supporting workers who start early and finish in the afternoon. By booking ahead for no extra charge you are guaranteed a seat on Route D970, which offers additional morning, afternoon and evening services on weekdays only. This additional service is running on a 12-month trial basis and is part of a major bus network revamp delivered by Transport for NSW in partnership with Busabout Wagga, providing a better, smarter bus network for all of Wagga.

<https://busaboutwagga.com.au/bomen-service/>

Uber / Fruber / Ride Sharing / Car Pooling

Eight stakeholders discussed the possibility of some sort of coordinated ride sharing or car-pooling system to support people with getting to work or education. It was noted that this is happening in many informal ways especially with TAFE and University students. It was also noted that there is currently no Uber service south of Kiama, although there have been some discussions about extending this service into the Far South Coast region.

Several stakeholders noted that an opt-in system was problematic for many people and this presents a problem with a formalised ride-sharing or car-pooling system, however, others thought that if it was coordinated centrally, it could provide one option for people.

Shoalhaven City Council reported that they attended a conference in which the concept of Fruber was discussed. Fruber is a free Uber service, that is, a free on demand transport system, that has started in some centres, mostly overseas.

CASE STUDY

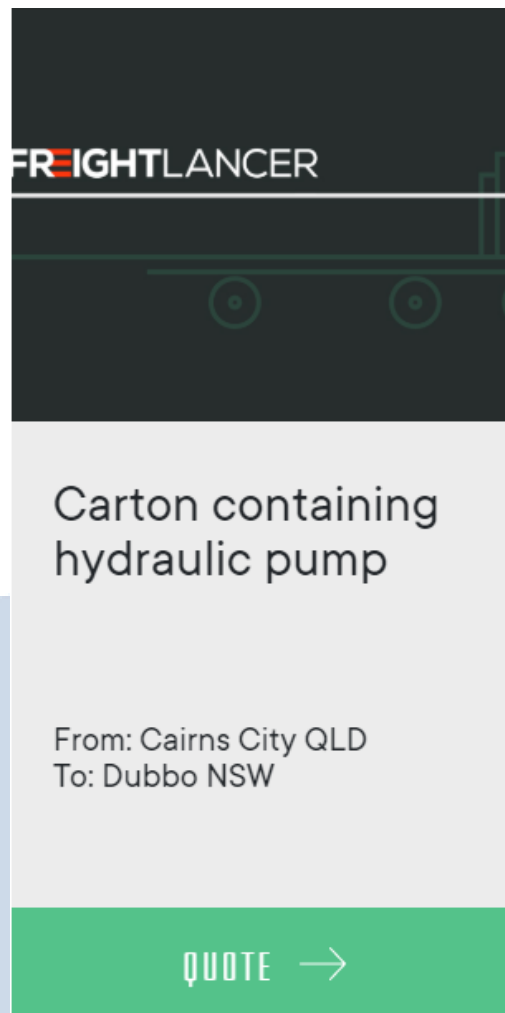
On demand services in the freight sector have developed in recent years with companies matching suppliers and customers. A similar model could be used to match transport providers and people seeking transport to work or education.

FREIGHTLANCER

Freightlancer is a combination of a marketplace and management system using a free mobile application for both drivers and freight owners to transport goods.

It has simplified the supply chain for freight owners and transport companies. Freightlancer has been built by a team of freight owners who have created an app that is simple, reliable and conveniently links drivers and businesses to coordinate freight deliveries in regional areas.

<https://www.freightlancer.com/>



Provision of transport solutions outside of core business

All stakeholders interviewed reported that transport was an issue across the region. However, many of the stakeholders noted that they were addressing this issue as part of their service delivery even though transport was not part of their core delivery.

A number of stakeholders reported that they provided transport options to access their services or were aware of other businesses or organisations that also organised transport solutions, however, this was often in an ad-hoc or informal manner. Stakeholders also commented that they were aware of programs and education courses that had been offered with poor outcomes when transport was not considered part of the delivery. These included:

- TAFE courses for students at the local high schools which finish after school hours. This results in limited bus transport to the outlying communities for these students at the end of the evening making them reliant on parents to get home.
- An aged care course that was offered in a coastal community started with 17 enrolments. When work placements occurred as part of the training, participants had little access to transport and only 4 students completed the course.

"The transport solutions that we provide pull the funds away from other areas of service but if we do not provide them then our people won't attend"

Indigenous Service Provider

Stakeholders also provided examples of success stories when transport provision was included:

CASE STUDY

Driver Licensing Access Program

This program assists Aboriginal and other disadvantaged people to get and keep their driver's licence and remain safe and legal drivers. The program is funded through Transport for NSW and to qualify for a program, the population must have a higher proportion of Aboriginal and Torres Strait Islander population than the state average. In the Far South Coast region, the program is offered at Nowra and Narooma through the Australian Red Cross and at Bateman's Bay and Moruya through TAFE Illawarra.

<https://www.rms.nsw.gov.au/roads/licence/driver/driver-licence-access-program>

CASE STUDY

Eurobodalla Shire Council offers an after school program at their Youth Centres on a Friday afternoon. The young people are provided with food, activities and education programs including drug and alcohol or mental health programs. At the end of the evening, the young people are driven home in a fleet of coordinated maxi taxis to the different areas within the Shire.

CASE STUDY

Twofold Aboriginal Corporation Workforce Development Project

This was a Regional Employment Trial project and was a skills-based approach to support Indigenous people build their capacity for employment. The model uses locally delivered and targeted education and training programs to deliver employment outcomes for participants. The Twofold Aboriginal Corporation will use an asset to build skills and capabilities with unemployed and underemployed Indigenous jobseekers; engaging with mainstream employment opportunities for Indigenous jobseekers in building construction, civil construction and timber industries.

The project also partnered with an Indigenous RTO, Walanmiya; the VETEC provider, Cultural Connexions and Campbell Page as the jobactive provider.

In addition to the above, NIAA provided funds to establish a transport and mentor arrangement so that participants could engage in training and subsequently, transport to work could be provided as well as in-work-support by the mentor. This would enable local Aboriginal people to gain work skills for known jobs in construction and the timber industry and also for future work opportunities such as Snowy Hydro work in the broader region.

CASE STUDY

Learner Driver Mentor Program



In the Southern Highlands, where 82% of people drive to work, a driver's licence is critical to get a job. Volwing's Learner Driver Mentor Program gets disadvantaged young adults behind the wheel and on the road to worthwhile careers.

Volwing launched the program in 2018. The program supports vulnerable new drivers, aged between 16 and 24 years, to become licensed by allowing them use of a vehicle for on road practice while a volunteer mentor supervises them.

Volwing's key partner is St Vincent de Paul Society in Bowral and local driving school, Highlands Drive Safe. Highlands Drive Safe provides the first ten logbook hours, teaching students to drive before handing them over to our volunteer mentors.

The Learner Driver Mentor Program has funding support from the Australian Government Department of Social Services, Wingecarribee Shire Council and Mittagong RSL Club through ClubGRANTS.

<https://volwing.org.au/learner-driver-mentor-program/>

CASE STUDY

School Leaver Employment Supports

This is an early intervention program for students in their last year of school, supporting the transition from school to employment.

Providers who deliver the program help young people prepare, look and gain employment and to achieve their employment goals. Westhaven is one provider of their service in Dubbo, NSW. Participants plan their pathway choosing a combination of individual, social and community activities working towards employment as an outcome across:

- Computer and job search skills
- Resume writing and interviewing skills
- Job site training and work experience
- Travel training including help to obtain a learner driver's licence

http://www.westhavendubbo.com.au/literature_202219/Annual_Report_2019.mp3

<https://www.ndis.gov.au/providers/working-provider/school-leavers-employment-supports-sles>

CASE STUDY

YDrive

Ydrive is run by Eurobodalla Shire Council and helps disadvantaged young people in the Shire build up the 120 hours of driving experience they need to get their P-plates (provisional driver's licence). Ydrive links volunteer licensed drivers with learners who find it tough to get the driving experience they need. Council has three vehicles, 2 of which were donated by a local car yard and third bought with funding. Volunteers and mentors do the co driving. Mechanics from the Council depots provide some help with how to look after a car. Mentors have continued to develop relationship with the participants after the driving sessions. Council has received funding for the program.

Other issues

The other issues raised during the interviews are summarised below.

- **Education in the region** – the lack of course offerings in the region was raised by stakeholders. Young people are often required to leave the region to attend TAFE courses in Wollongong, Sydney and Canberra, which requires access to a car and often overnight accommodation. Further, the lack of public transport between major urban centres was reported to limit young people's options in attending education providers within the region.
- **Freight** – Councils in particular, raised the importance of good access to the region for freight both via road and rail. Constraints on the road and rail networks impact on investment in the region and have a flow on impact on employment.
- **Active transport** – the importance of adequate cycling and pedestrian paths linking communities was raised as part of the discussions. The councils have developed plans and are seeking funding for ongoing improvements to increase their active transport networks locally, allowing more people to ride and walk to work.
- **Parking** – with the reliance on cars for transport across the region, parking in and around the major urban centres was raised as a concern. During peak holiday periods, the parking problem is increased and with additional growth across the network, the parking problem is expected to increase.
- **Community transport** – currently does not allow for transporting people to work. An expansion of the service may offer additional transport options for people as there are extensive networks across the region. An example was a business that was employing people under the National Disability Insurance Scheme to provide transport services. The stakeholder reported that many of these people were trained, met the working with vulnerable people criteria, but were not fully employed and were seeking additional work.
- **Long distances** – stakeholders recognised that the region is diverse and large with many people travelling to obtain work. There were differing opinions on the impact of distance on the ability to gain work. Some stakeholders suggested that people were prepared to travel long distances to gain work whilst others thought that the daily grind of travel eventually impacted people and that employers were therefore reluctant to employ non-local people. Other stakeholders commented on the cost of travelling long distances.
- **Sustainability** – the increasing demand for electric cars and charging stations presents an opportunity for the region to grow this sector.

CONCLUSION

The overriding issue identified in assessing the adequacy of transport solutions across the Far South Coast Region is the provision of better designed available services that will deliver workers to their jobs and students to their training providers on an as needs basis. This is not to say individualised services are required as the costs associated with such an approach would be preclusive. What is evident is the better coordination across existing services and improved utilisation of existing resources coupled with planning for jobs creation and training access would improve the ability for residents of the Far South Coast Region to get to the places of work and their training sessions.

As could probably be expected with a diverse range of service providers in transport servicing, there is a piece meal approach to service delivery of transport solutions. Limited access to private vehicles was the major impediment identified by stakeholders impacting those needing to travel to work or training. Bus and train access is limited and offers small opportunities to meet the transport needs of residents across the Bega Valley Shire Council, Eurobodalla Shire Council and Shoalhaven City Council areas. The size of the area the 3 councils support is also a factor and public transport solutions without some innovative thinking and collaboration across the tiers of government, employment, education and transport sectors are unlikely to impact on the current levels of service.

At the same time there appears to be underutilised vehicles that could, with a coordinated approach, be better used to meet the transport needs of locals across the region. With more than 700 small buses, almost 500 people movers and over 620 buses in the Region, a more thorough assessment of the availability and interest from owners of these vehicles to participate in a coordinated service to improve transport options is proposed.

Coordination at the planning stages of jobs creation programs in the public and private sectors and course design that incorporates transport access is also suggested as part of the solution to the Region's transport issues.

However, there are also equity issues relating to the populations in the Region, including the needs of younger workers and students having limited access to cars to learn to drive, mentors to assist in racking up the learner hours of experience and then the ability to afford a vehicle and the fuel required to drive it.

There are examples of how these issues have been addressed in other locations in the report that can be used as the basis for building better transport solutions so that workers can get to work and students to their training more easily.

RECOMMENDATIONS

Issue	Description
<p>Transport options available to deliver workers to work and students to training at a range of times via a network of small buses and people movers added to existing services.</p>	<p>Create a business that coordinates vehicles and drivers from local firms who are currently under-utilised to increase services to meet needs of workers and students.</p>
<p>Actions</p>	<ul style="list-style-type: none"> • Identify potential partners in the project, especially those businesses in the community with commitment to employment projects. • Identify the pool of drivers who are underemployed. • Identify interest from vehicles owners to participate in a coordinated service that uses idle vehicles more efficiently. • Vehicle owners and drivers to submit expression of interest and costs for use of their vehicles and their services in a coordinated service. • Liaise with employment agencies and businesses to identify best timetabling options for enhanced transport solutions in locations of highest need. • Liaise with education section to identify best timetabling options for enhanced transport solutions in areas of highest need. • Liaise with National Disability Insurance Scheme, Community Transport and other funded services who are under employed to seek interest in full utilisation of their vehicles. Assist these entities with navigation around funding restrictions limiting additional services. • Write a business plan for the coordination service and seek funding for a 12-24 month trial in a number of locations to test viability. Include cost base and who and how the service might be coordinated. Include consideration of an easy to use app to provide the centralised coordination.
<p>Responsibility</p>	<ul style="list-style-type: none"> • Councils and RDA FSC develop the business case the identify funding options to implement trial across all three council areas.

Issue	Description
Driver's licence access program	Coordinate driver's licence attainment programs.
Actions	<ul style="list-style-type: none"> • Identify areas of need for program. • Identify existing programs to ensure no duplication of services. Engage with current program providers about possible expansion of their services and or coordination with other services to deliver more broadly available services. • Investigate the NSW Government's Drivers Licence Assistance Program (seeking information on next rounds for this program initially) and the YDrive program delivered by Eurobodalla Shire Council as examples to base the program on given successes in these programs. • Coordinate with education sector and options for delivery as a curriculum course. • Investigate options for inclusion of funding via the jobactive package.
Responsibility	<ul style="list-style-type: none"> • Councils, NSW Education, Transport for NSW

Issue	Description
Future planning of jobs creation and education course design to consider transport solutions.	Hold annual planning sessions with key stakeholders to identify where jobs creation and course delivery planning needs to incorporate transport solutions to ensure the programs are successful to build skills and create jobs in the Far South Coast region.
Actions	<ul style="list-style-type: none"> • Host a planning forum with key stakeholders to identify how transport solutions at the local levels can be incorporated into business planning and education sector course design. • Solve the issue of jobs and courses being in place without identifying how workers and students will get to the required locations
Responsibility	<ul style="list-style-type: none"> • RDA FSC

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Issue	Description
Build on the experience of working from home in the COVID-19 isolation period to change how people work and train	More training and working from home opportunities to improve work and training outcomes and reduce reliance on transport options.
Actions	<ul style="list-style-type: none"> • Investigate delivery of Vocational Education practical course components locally instead of students having to travel. • Work with Business NSW to engage local Chambers of Commerce on continuing flexible working options including working from home as part of recruitment planning • Learn from the experiences of the 2020 fires and how access to the area was impacted to initiate better knowledge and timely solutions to reinstate access. • Include assessment of pinch points in road networks in particular and build an awareness campaign that highlights the benefits of flexible working hours and working from home, particularly during busy holiday periods.
Responsibility	<ul style="list-style-type: none"> • RDA FSC

Issue	Description
Businesses leading flexible transport solutions for their recruits.	Identify best practice solutions that solve transport issues with effective engagement of workers.
Actions	<ul style="list-style-type: none"> • Seek details from business who offer opportunities to staff to use company vehicles or support/facilitate car-pooling to assist in giving their workforce options in getting to work. • Promote the solutions they use and the successes in promotional blogs featuring the businesses and specifying what their business got out of the initiative.
Responsibility	<ul style="list-style-type: none"> • Business NSW

METHODOLOGY

The project consisted of the following research elements.

Desktop research and data analysis

- Desktop research was used to identify transport elements and the current levels of service across the three LGAs. Data sources included Transport for NSW and the ABS.
- A datasheet tool was distributed to the three LGAs to collect information on different transport elements and the level of service as well as any planned transport infrastructure expansion.
- Desktop research was used to assess the current jobs market in the region. Data sources included the Federal Government's Labour Market Portal, ABS, Small Area Labour Market Data and Regional Australia Institute's Regional Jobs Vacancy Map.

Consultation

- A group interview was undertaken with invitations extended to each councils' senior management and mayor. The group interviews collected feedback on the broad transport issues and how these impact access to employment, education and training in their local region. The summaries from these interviews are provided in Appendix 4.
- Three additional group interviews were conducted with stakeholder groups including the RDA FSC, a group of employment agencies and a group of representatives from Campbell Page.
- Individual telephone interviews were conducted with key stakeholders from local government, NSW Government, Federal Government, employment agencies, Indigenous organisations, local businesses and the education sector. A total of 22 interviews were undertaken, and a list of stakeholders is provided in Appendix 5.

Business Survey

- An online survey was developed for the business community to examine the linkages between transport, employment, training and education in the Far South Coast region of NSW and the extent that current regional transport infrastructure impacts on employment capability.
- The survey was distributed to local Business Chambers and a range of business stakeholders identified by RDA FSC. A distribution list is provided in Appendix 5.
- The questionnaire was developed by WRI with signoff from RDA FSC.
- The survey was distributed by WRI via email link to each of the stakeholders identified by RDA FSC with an invitation to forward the link to any interested contacts or organisations.
- 22 complete surveys were completed with some representing multiple businesses (e.g. chamber of commerce respondents).

Employment Survey

- An online survey was developed to examine the linkages between transport, employment, training and education in the Far South Coast region of NSW and the extent that current regional transport infrastructure impacts on employment capability.
- Respondents were sought from residents of the three council areas in one the following three categories

- Unemployed and looking for work
- Employed and looking for additional work or a different job
- Currently studying or attending education or training in the region.
- The questionnaire was developed by WRI with signoff by RDA FSC.
- The survey was distributed to contacts and clients of stakeholders identified by RDA FSC to be interviewed during the consultation including the employment agencies and education providers. The survey was initially distributed by WRI with a follow up email sent to employment agencies and education providers to endeavour to improve the response rate. RDA FSC also followed on distribution.
- 12 complete surveys were received.
- Feedback from employment agencies identified that due to COVID-19 restrictions, they had little contact with jobseekers. This severely hampered the distribution of the survey as they were unable to deliver the promotion that was initially identified to engage with job seekers.

APPENDIX 1: TRANSPORT SUMMARY

TRANSPORT SUMMARY																	
	Shoalhaven City Council	Eurobodalla Shire Council	Bega Valley Shire Council														
AIR SERVICES	<ul style="list-style-type: none">No regular passenger transit servicesHMAS Albatross – Navy training base for helicopter squadronsJervis Bay Range facility – Navy Training Base	<ul style="list-style-type: none">Moruya Airport3 daily passenger services to Sydney <p>Regular passenger transit numbers</p> <table><thead><tr><th>Financial year</th><th>Number</th></tr></thead><tbody><tr><td>2016-17</td><td>18,300</td></tr><tr><td>2017-18</td><td>21,470</td></tr><tr><td>2018-19</td><td>21,200*</td></tr></tbody></table> <p>*Closed for 21 days for runway upgrades Source: Eurobodalla Shire Council</p> <ul style="list-style-type: none">Freight is provided by Toll Air and Regional Express	Financial year	Number	2016-17	18,300	2017-18	21,470	2018-19	21,200*	<ul style="list-style-type: none">Merimbula AirportRegional Express daily services to Sydney (via Cooma and Moruya) 3 trips per weekday, 2 trips on a weekendRegional Express to Melbourne - 6 days a week with additional services on Tuesday, Wednesday, Thursday60/40 split in passenger numbers between Sydney and Melbourne <p>Regular Passenger Transit Numbers</p> <table><thead><tr><th>Year</th><th>Number</th></tr></thead><tbody><tr><td>2018</td><td>60,240</td></tr><tr><td>2019</td><td>60,905</td></tr></tbody></table> <p>Source: Bega Valley Shire Council</p> <ul style="list-style-type: none">Freight to and from Melbourne and Sydney – Regional Express and private providers	Year	Number	2018	60,240	2019	60,905
Financial year	Number																
2016-17	18,300																
2017-18	21,470																
2018-19	21,200*																
Year	Number																
2018	60,240																
2019	60,905																

TRANSPORT SUMMARY

Shoalhaven
City Council

Eurobodalla
Shire Council

Bega Valley
Shire Council

RAIL SERVICES



- Intercity Train Network - South Coast Line terminates at Bomaderry
- 17 services to and from Sydney - Monday to Friday
- 12 services to and from Sydney – weekends and public holidays

- No rail services

- No rail services

Monthly Trips -South Coast Line 2019

Month	Total Trips
Jan-19	778,741
Feb-19	811,446
Mar-19	928,513
Apr-19	867,366
May-19	943,504
Jun-19	795,210
Jul-19	847,745
Aug-19	869,746
Sep-19	855,595
Oct-19	868,923
Nov-19	875,468
Dec-19	698,531
Total	10,140,788

Source: Transport for NSW, 2019

- Average monthly trips 845,000
Source: Source: Transport for NSW, 2019

TRANSPORT SUMMARY

Shoalhaven
City Council

Eurobodalla
Shire Council

Bega Valley
Shire Council

BUS SERVICES



- Premier Coaches – connects Sydney to Eden – twice daily. Departs Sydney: 9:00am and 3:20pm.

Departs Ulladulla 6:30am and 11:05am.
- Premier Coaches – Shoalhaven services.
Ulladulla to Bomaderry Rail Monday to Friday and additional services on a Tuesday and Thursday.
- Shoalbus local services from Ulladulla in south to Gerringong in the north
3-4 services per day Monday to Friday to outer areas, 2 services Saturday – no services Sunday and public holidays.

Nowra – Bomaderry loop - 10 services daily Monday to Friday, 3

- Premier Coaches – connects Sydney to Eden – twice daily. Departs Sydney: 9:00am and 3:20pm.

Departs Narooma: 4:40am 8:30am.
- Murrays Coaches.
Daily services between Canberra and Narooma.
- Rixons Shuttle Service.
Daily service between Canberra and Batemans Bay.

Locally connects Narooma to Bodalla and Dalmeny.
- Priors Bus service.
Batemans Bay to Moruya Hospital and suburbs from Long Beach to Broulee – 7-11 daily services Monday to Friday and 2-3 services on Saturdays and

- Premier Coaches – connects Sydney to Eden – twice daily. Departs Sydney: 9:00am and 3:20pm.

Departs Eden: 2:40am and 6:05am.
- VLine – connects to Batemans Bay to Melbourne daily.
Stops in Eden, Bega, Merimbula and Pambula. Connects with VLine train in Bairnsdale Victoria.
- Bega Valley Coaches.
Bega to Bermagui/Cobargo – 3 services Monday to Friday plus school only buses
- Sapphire Coast Bus lines.
Bega to Eden – 3- 5 services Monday to Friday and 3 services on Saturday on different loops

Merimbula to Pambula – 5 services Monday to Friday, no weekend services

TRANSPORT SUMMARY

Shoalhaven City Council	Eurobodalla Shire Council	Bega Valley Shire Council
<p>services loop Saturday, no services on Sundays or public holidays.</p> <ul style="list-style-type: none"> Nowra Coaches services Nowra, Bomaderry, South Nowra, Huskisson, Vincentia and Jervis Bay. East and West Nowra Services – 7 services Monday to Friday, 4 services Saturday and no services on Sunday. <p>Bay and Basin to Nowra – 6 services Monday to Friday, 3 services Saturday and no services on Sundays.</p> <p>Bomaderry to Jervis Bay – Tuesday and Friday only -1 service.</p> <ul style="list-style-type: none"> Stuart's Buses services Currarong, Callala Bay, Callala Beach, Myola and Railway Station. Currarong to Nowra – 2 services Monday to Friday including school services, no weekend services. 	<p>public holidays on different loops.</p> <ul style="list-style-type: none"> VLine –connects Batemans Bay to Melbourne daily. Stops in Batemans Bay, Bermagui, Cobargo, Mogo, Moruya, Narooma and Tuross Head. Connects with VLine train in Bairnsdale Victoria. 	<p>Bega to Regional Hospital – 3 services on 2 different loops</p> <p>Merimbula to Tathra – 2 services Monday to Friday, no weekend services</p> <ul style="list-style-type: none"> Flexi-bus - On -Demand Public Transport. Between Eden and Bega.

TRANSPORT SUMMARY

Shoalhaven
City Council

Eurobodalla
Shire Council

Bega Valley
Shire Council

Callala Bay to Nowra -3 services
Monday to Friday, including school
services, no weekend services.

Kennedy's Bus and Coaches
Greenwell Point, Worrigee, Pyree,
Brundee, Culburra Beach, Orient
Point, Terara, Numbaa, Railway
Station, University and TAFE.
Greenwell Point to Nowra - 4
services Monday to Friday including
school services, no weekend
services.

Culburra to Nowra – 5 services
Monday to Friday including school
services, no weekend services.

Kangaroo Valley to Nowra – 5
services Monday to Friday including
school services, no weekend
services

TRANSPORT SUMMARY

	Shoalhaven City Council	Eurobodalla Shire Council	Bega Valley Shire Council
ROAD INFRASTRUCTURE Pinch Points 	<ul style="list-style-type: none"> Freight to the north is impacted at Mt Ousley/Picton Road at the Figtree offramp (morning congestion) Occurrence Daily – no alternate route Current delays around Albion Park Rail however the new bypass will improve this Occurrence Daily – no alternate route No HML access to west Occurrence Daily – no alternate route Commuter congestion at intersections with Princes Highway Occurrence occasional incidents – cars can sometimes detour however if incident on Princes Highway then no other alternate. Congestion worse in holiday period Traffic lights and roundabouts in Nowra and Bomaderry at peak times 	<ul style="list-style-type: none"> Local and regional road network including damage caused by recent fires Princes Highway – access was cut north and south during fires, with access needed for the essential supply for firefighting, food and fuel deliveries Kings Highway – primary and shortest east-west transport link from Canberra, Queanbeyan and Goulburn Occurrence is daily on all routes as the Eurobodalla is almost entirely dependent on road transport with increased pressure on weekends, long weekends, school holidays and peak periods. There are no other alternate routes. 	<ul style="list-style-type: none"> Princes Highway – Brogo Bridge Occurrence daily due to vehicle configurations – if closed there are alternate routes however these have weight restrictions Snowy Mountains Highway – Browns Mountain Occurrence daily due to vehicle configurations – if closed there are alternate routes however these have weight restrictions Mount Darragh Road (MR 91) – Six Mile Bridge Occurrence daily due to bridge constraints and approach/departure geometry – if closed there are detours available Merimbula – Bridge over Merimbula Lake Occurrence during summer due to visitors – longer alternatives are available north and south bound Main Road 272 – number of timber bridge structures and hairpin end on Beach Hill at Tathra Occurrence during summer due

TRANSPORT SUMMARY

Shoalhaven City Council	Eurobodalla Shire Council	Bega Valley Shire Council
<p>Occurrence worse in holiday periods – few alternatives</p> <ul style="list-style-type: none"> Weekend peaks and holiday peaks through Nowra which cause long delays <p>Occurrence 4-6 times per year, 200-300-kilometre diversion</p>		<p>to visitors –alternatives is available via the Princes Highway</p>

COMMUNITY TRANSPORT



Shoalhaven Community Transport Service

Individual transport

- Accessible transport to medical and hospital appointments, social and recreational activities, shopping, visiting a family member or friend in a hospital or nursing home, banking and other business.
- Services are typically local, but also appointments in other major centres, including Sydney, Wollongong and Canberra.

Group transport

- Buses provide door to door group transport to respite centres, shopping,

Eurobodalla Shire Council is the sole provider of Community Transport within the LGA.

- 11 Vehicles in the LGA
- Fixed shopping runs
- Customer demand – daily trips to Canberra and regular trips to Bega and Nowra



80% of the clients are through assessment by the My Aged Care Regional Assessment Service and some funding for disadvantaged people.

20% of clients are from a contract with Health NSW or for people who pay full cost recovery through Home Care or NDIS funding.

Bega Valley Community Transport Service

- Transport is available between the hours 7.00am-5.00pm, Monday to Friday.
- Service is available outside these hours, by negotiation, but is subject to the availability of resources.
- Service provided throughout the Bega Valley Shire to Canberra, Batemans Bay and Narooma.
- Sydney: Bega Valley Community Transport provides services to and from Merimbula airport and also can arrange for pickup at Sydney Airport and taken to and from the destination.

TRANSPORT SUMMARY

	Shoalhaven City Council	Eurobodalla Shire Council	Bega Valley Shire Council
	<p>social/recreational activities and weekend outings.</p> <ul style="list-style-type: none"> • Nowra – 6 services offered weekly and fortnightly • Ulladulla – 4 services offered fortnightly and monthly 		<ul style="list-style-type: none"> • Melbourne: Service provided to and from Merimbula airport or to and from the local bus stop. • Goulburn: Service is provided to Canberra where link to Goulburn via railway is provided.
TAXI 	<ul style="list-style-type: none"> • Nowra Taxi Service – 24 Hours • St Georges Basin Taxi Service • Milton Ulladulla Taxi • Berry Shoalhaven Heads Taxi • Culburra Taxi and Car Hire • Sussex Inlet Taxi Service 	<ul style="list-style-type: none"> • Batemans Bay Taxi Service • Moruya Taxi Service • Narooma Taxi Service 	<ul style="list-style-type: none"> • Merimbula Eden Taxi Service • Bega Booked Transport • Bermagui Taxis
ACTIVE TRANSPORT 	<ul style="list-style-type: none"> • Shoalhaven Bike Plan adopted in December 2013 	<ul style="list-style-type: none"> • Eurobodalla has pathways in 25% of its urban area 	<ul style="list-style-type: none"> • Limited amount of shared path networks within the towns and villages

APPENDIX 2: FUTURE TRANSPORT INFRASTRUCTURE

As part of the Transport Audit, each of the Councils were asked to provide a list of future transport projects. The table below provides a summary of the future transport projects provided by Shoalhaven City Council, Bega Valley Shire Council and Eurobodalla Shire Council.

LGA	PROJECT
Shoalhaven LGA	Nowra bridge will allow heavy vehicles to cross the Shoalhaven River in a southerly direction. Nowra congestion will improve marginally at peak times Commence 2020 and complete 2024
Shoalhaven LGA	Princes Highway and Jervis Bay Road intersection – improve road congestion
Bega Valley LGA	Upgrade of Bega – Candelo Road, Mogilla Road, West Kameruka Road to improve commuter safety.
Bega Valley LGA	Upgrade of a section of the Bega – Tathra Road (Evans Hill, Kalaru) to improve commuter and shared pathway user's safety.
Bega Valley LGA	Proposed extension to the Merimbula Airport to allow larger passenger planes to service the area and increase in General Aviation/Commercial Precinct.
Bega Valley LGA	Upgrade of Albert Terrace in Eden to improve access to the Port of Eden for Cruise Ship industry and general tourism.
Bega Valley LGA	Upgrade of Berrambool Drive Sapphire Coast Drive intersection to change priority.
Bega Valley LGA	Continuous program of renewals for both council's bitumen and gravel road networks.
Bega Valley LGA	Continuous program of upgrades and renewals to council's concrete and timber bridge network
Eurobodalla LGA	Beach Road, Batemans Bay road safety upgrade stage two
Eurobodalla LGA	Garlandtown Bridge North Head Drive, Moruya
Eurobodalla LGA	MacKay Park Regional Precinct highway intersection, roundabout and bus drop off facility
Eurobodalla LGA	Codys Bridge Larrys Mountain Road, Moruya
Eurobodalla LGA	Mogo CBD road upgrades (Annetts Street / Charles Street)
Eurobodalla LGA	Tomakin Road (Tomakin – Mogo distributor) road safety and intersection upgrade stage one

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

LGA	PROJECT
Eurobodalla LGA	Extra Roads to Recovery Allocation – gravel resheeting, resealing, pavement rehabilitation, road widening to sustain the local road network / improve road safety
Eurobodalla LGA	High priority pathways identified in the Eurobodalla Pathway Strategy
Eurobodalla LGA	Gravel resheeting works – unsealed rural road network
Eurobodalla LGA	George Bass Drive duplication Sunshine Bay (Batemans Bay)
Eurobodalla LGA	George Bass Drive road safety and intersection upgrades (Rosedale to Guerilla Bay)
Eurobodalla LGA	Bradburys Bridge Araluen Road, Moruya

Princes Highway upgrade – Source: Transport for NSW

In planning (June 2020)

- Quinlans Road, Cadjungan – safety improvements – completion 2020
- South of Moruya - safety improvements – completion 2020
- Moruya bypass – in planning stage – community feedback sought March 2020
- South Batemans Bay Link Road – connection to Princes Highway – relieve pressure in Batemans Bay CBD, new roundabout on Princes Highway, new 2 lane road connecting the existing South Batemans Bay Link Road at Glenella Road. Relieve pressure on Beach Road
- Nowra – new 4 lane bridge - \$342M – contract awarded
- Milton-Ulladulla bypass – community feedback being sought March 2020
- Jervis Bay Road intersection upgrade - community feedback sought March 2020

Under construction (June 2020)

- Berry to Bombaderry upgrade - \$450M – completion expected 2022 – safety and traffic flow improvements, complete 30km of upgrade works commence 2012 between Gerringong and Bombaderry

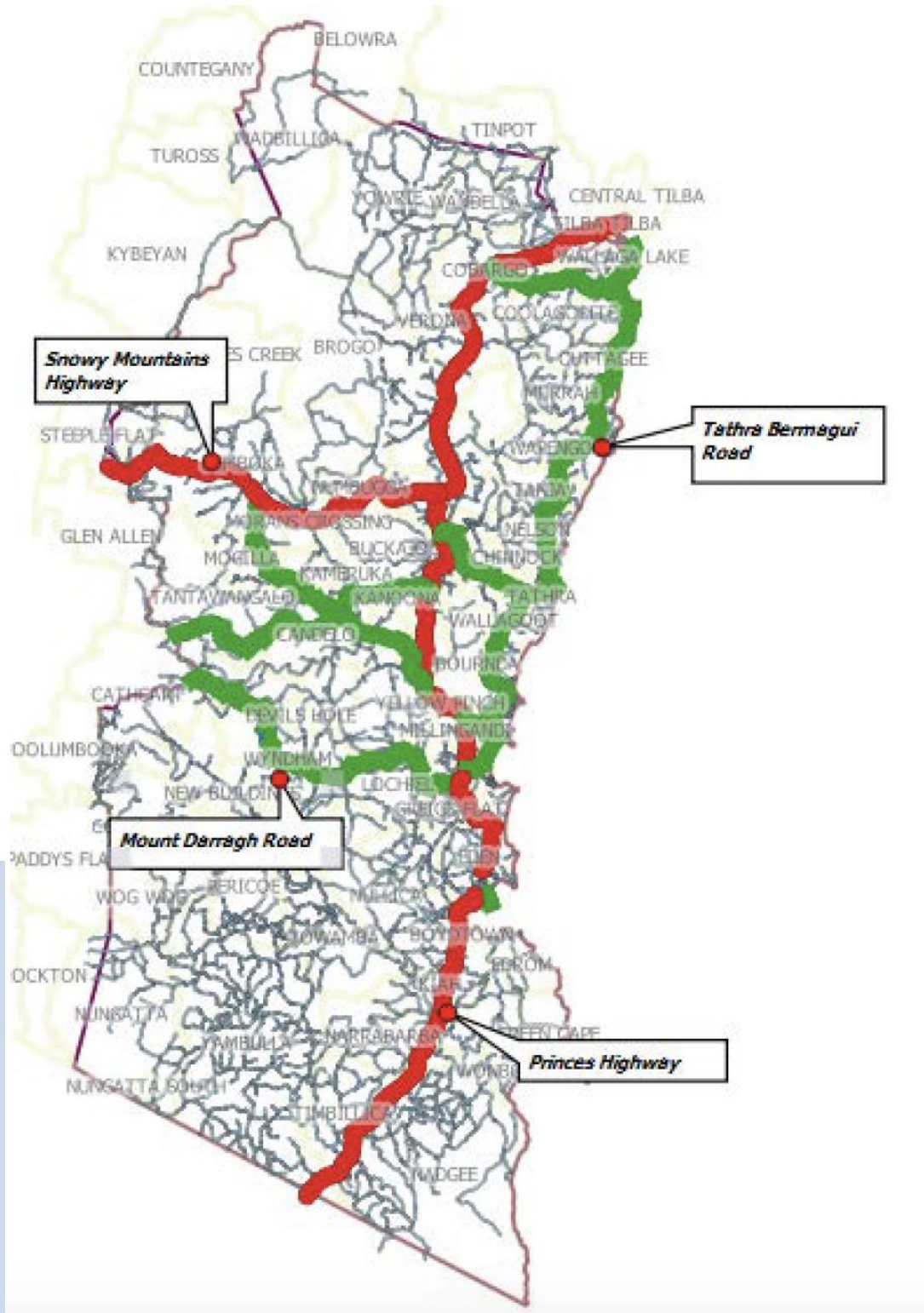
REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

- Termeil – near Boardinghouse Road, safety improvement to Princes Highway - \$5M – roadside safety barrier, median, shoulder widening and high friction seal
- Bateman's Bay Bridge replacement - \$274M – improve freight user access as well as safety for motorists, pedestrians and cyclists – continuing until late 2020 with completion in 2023
- Doctors Creek – safety improvements \$1.9M – completion 2021 – safety and widening of shoulders and centrelines
- Victorian border – safety improvements - \$800,000

APPENDIX 3: MAPS

Map 1 – Is in the body of the report

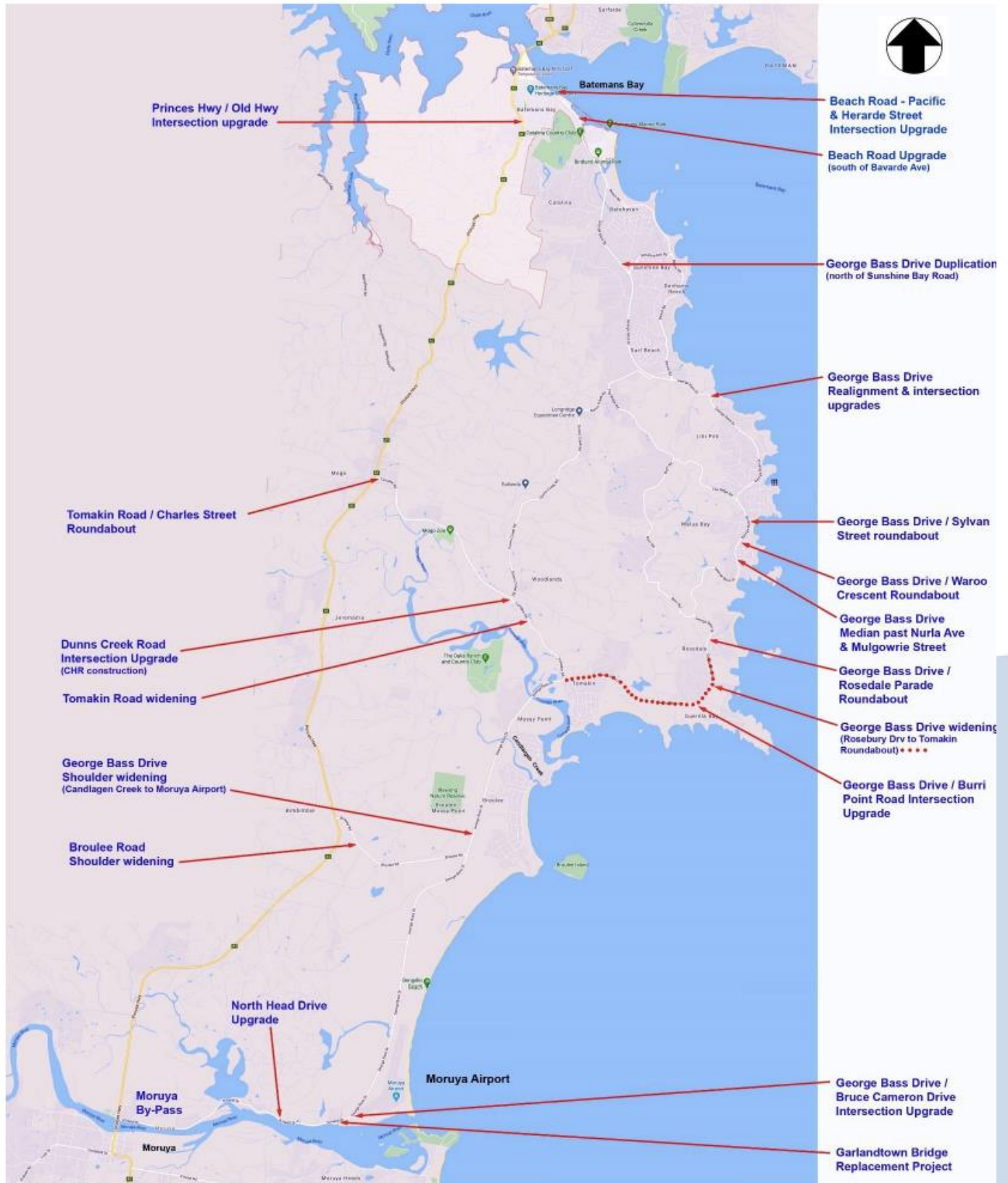
Map 2: Main Roads and Transport pinch points in the Bega Valley LGA



Source: Bega Valley Shire Council

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

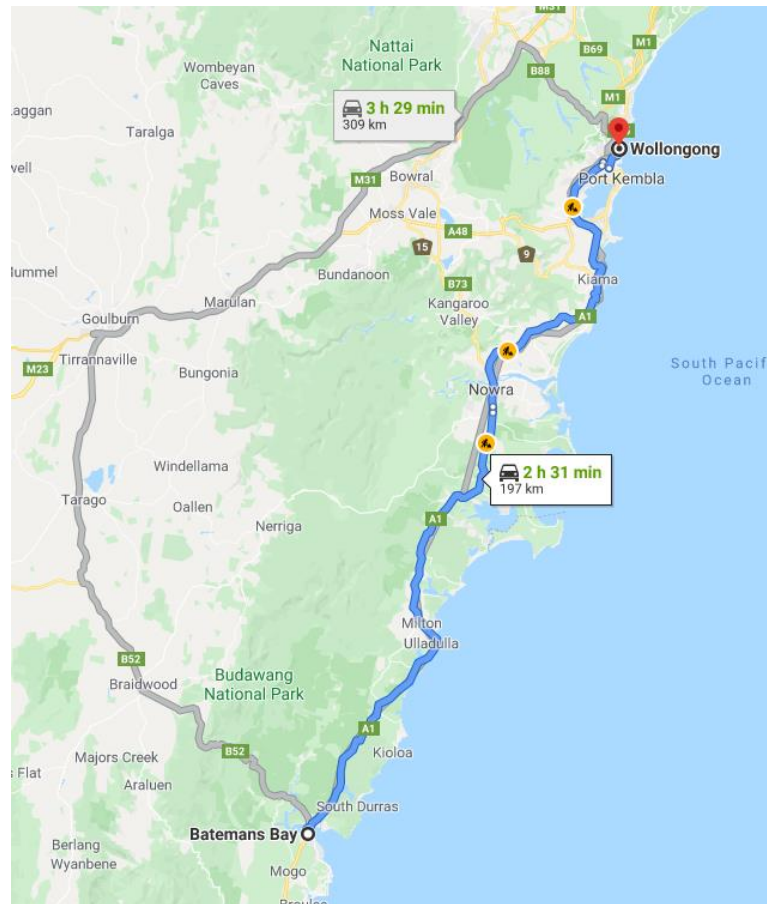
Map 3: Major local distributor roads upgrades in the Eurobodalla LGA



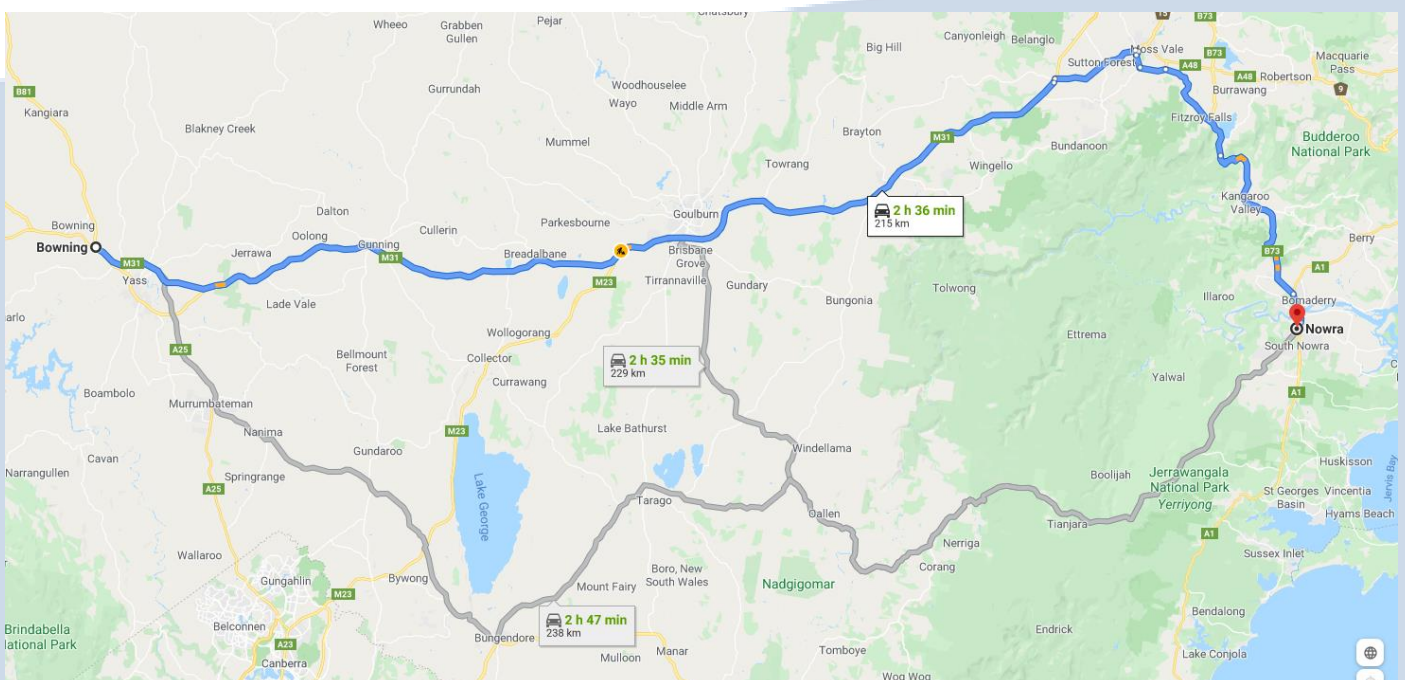
REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Source: Eurobodalla Shire Council

Map 4: Princes Highway through Shoalhaven LGA



Map 5: Alternate transport routes - Shoalhaven LGA



REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Map sources: Shoalhaven City Council

Map 6: South Coast Line – Intercity Trains



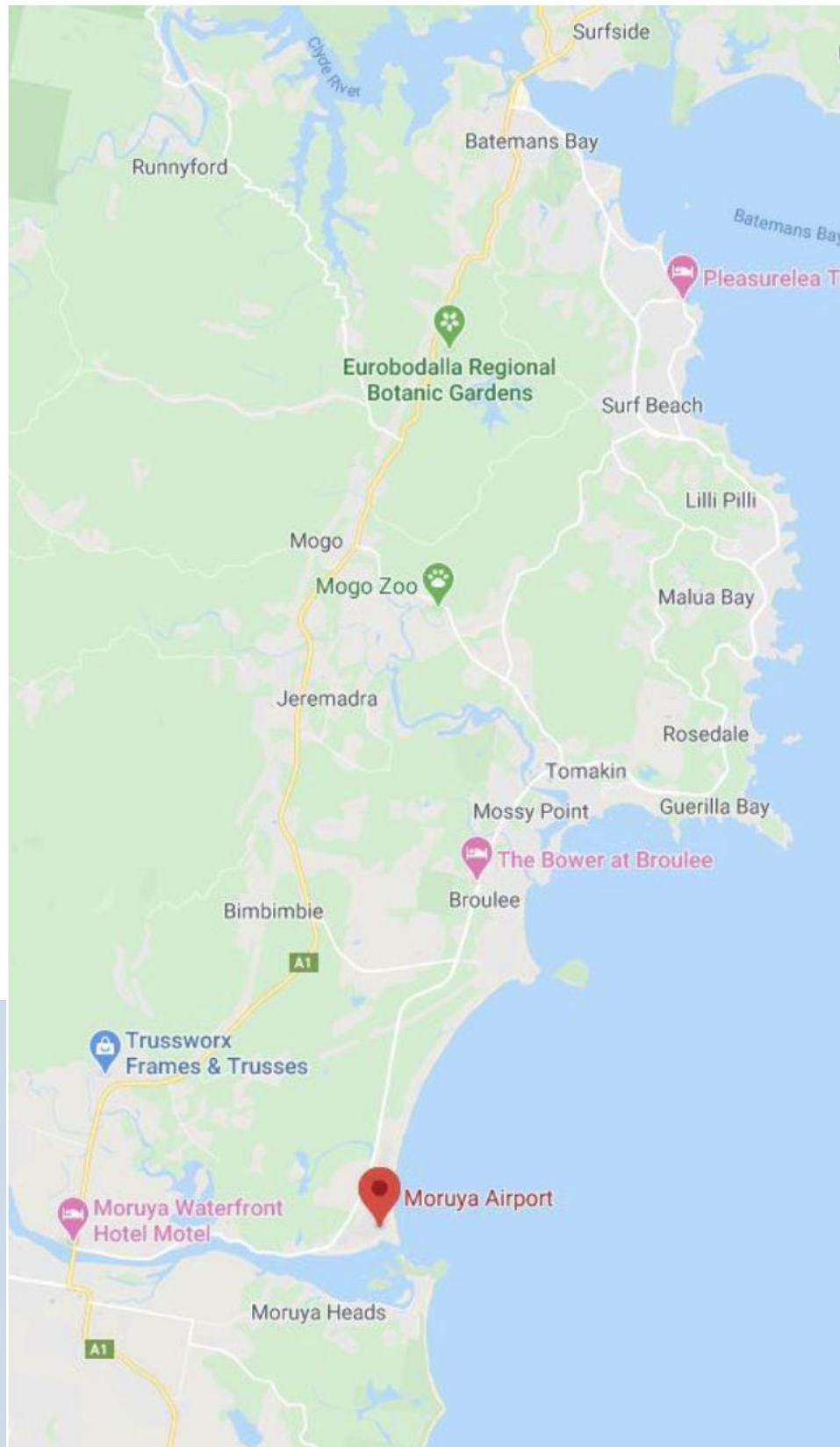
Source: Transport for NSW

Map 7: Merimbula Airport



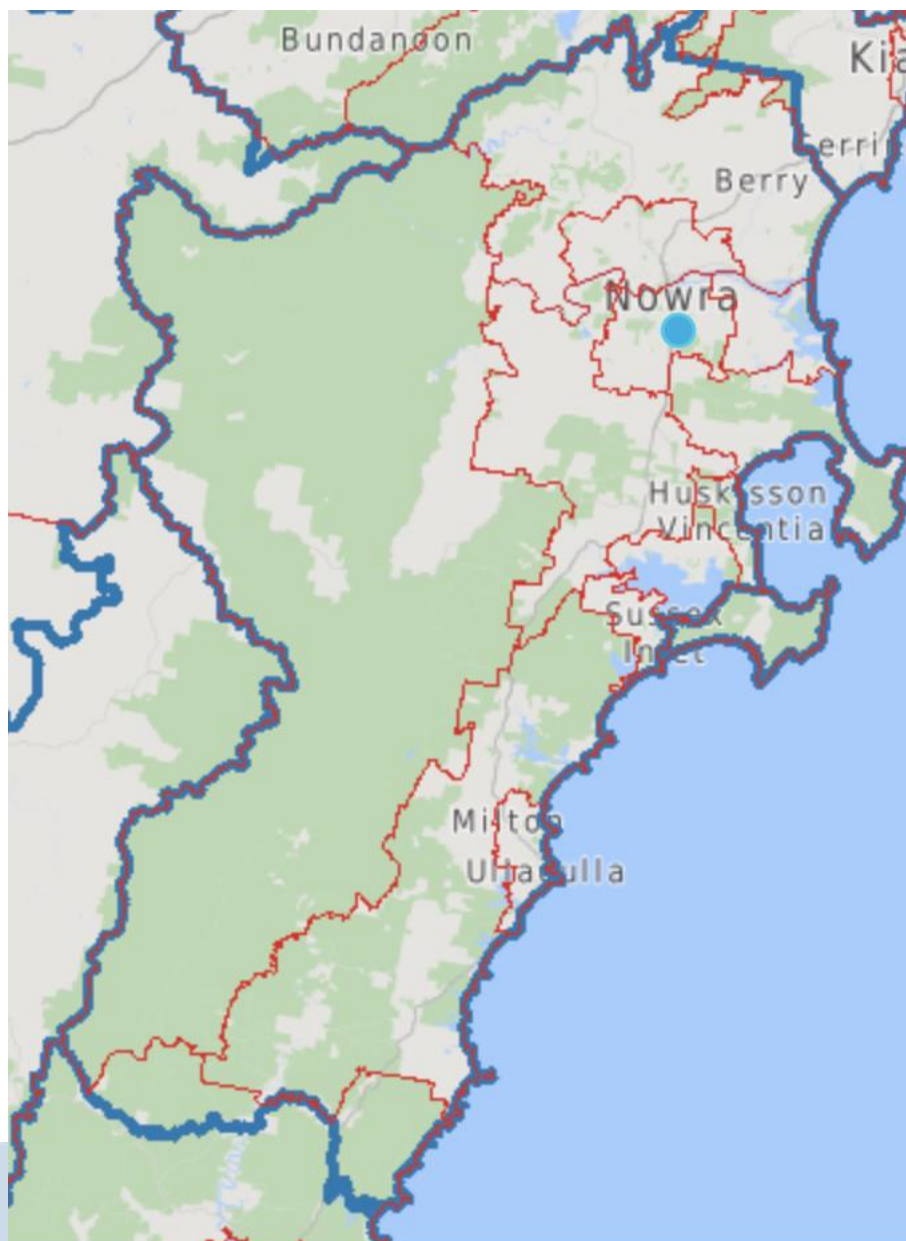
Source: Bega Valley Shire Council

Map 8: Moruya Airport

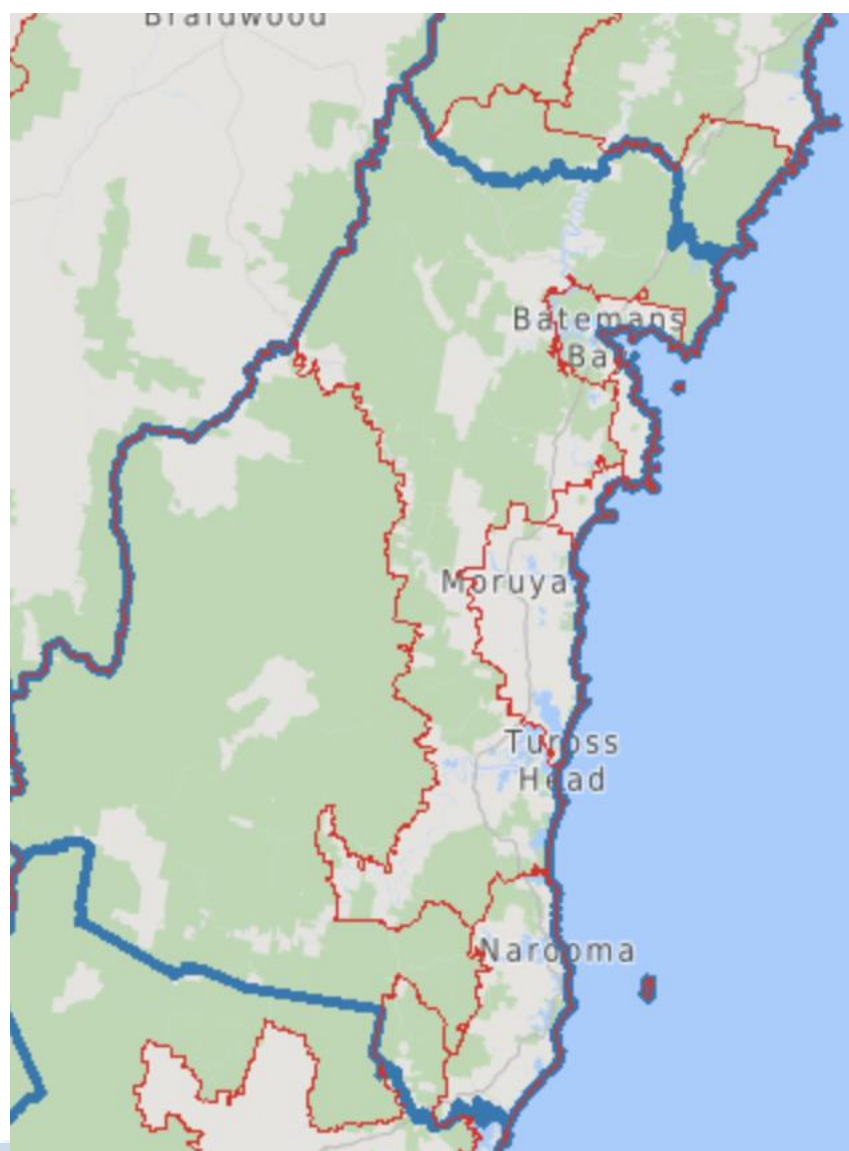


Source: Eurobodalla Shire Council

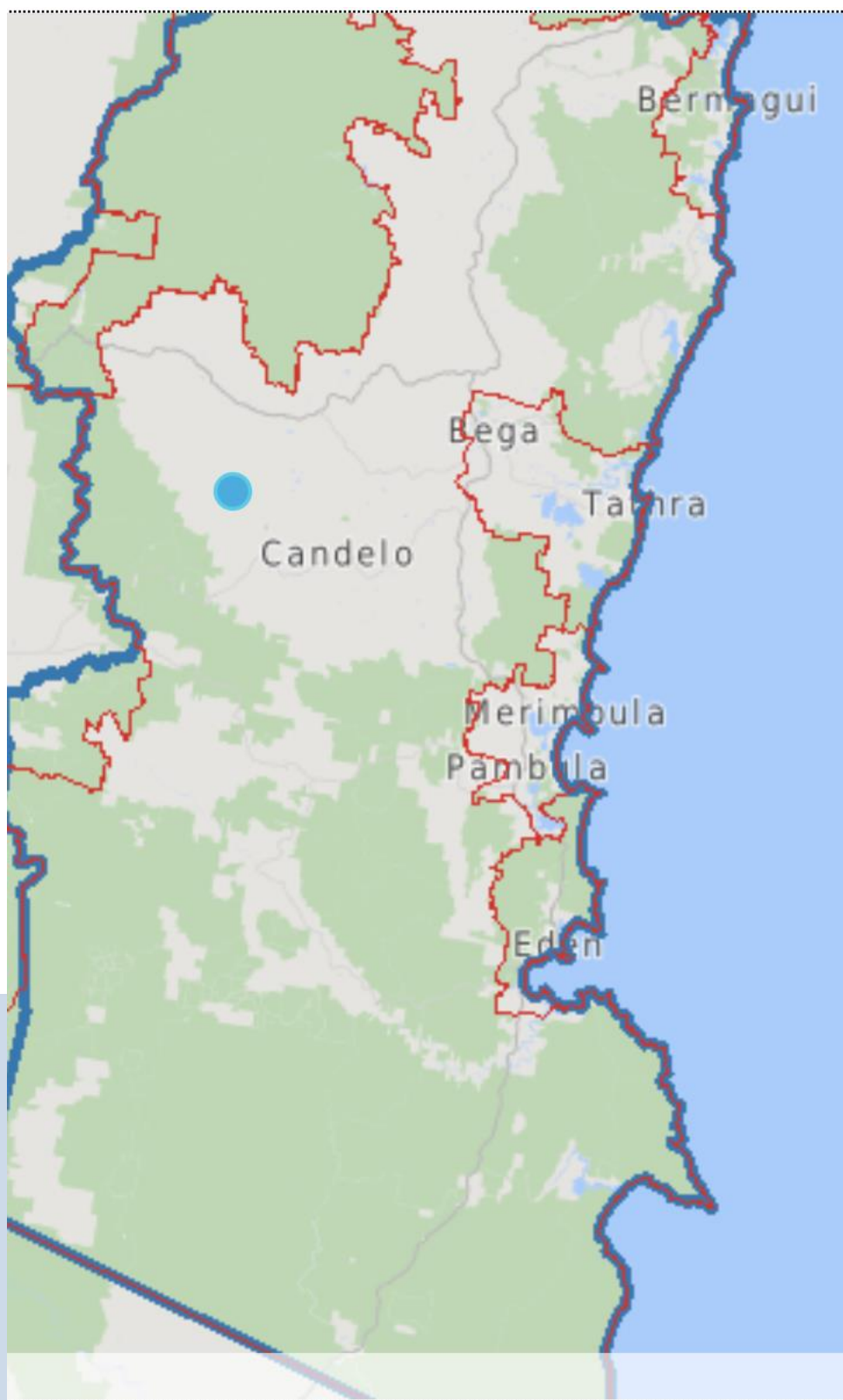
Map 9: Shoalhaven LGA showing SA2 regions (red boundaries)



Map 10: Eurobodalla LGA showing SA2 regions (red boundaries)



Map 11: Bega Valley LGA showing SA2 regions (red boundaries)



APPENDIX 4: LOCAL GOVERNMENT INTERVIEWS

Bega Valley Shire Council Interview

Attendees: Mayor Sharon Tapscott, Deputy Mayor Russell Fitzpatrick, General Manager Leanne Barnes

WRI: CEO Kathy Woolley, Project Manager Kathy Sloan, Administration Officer Heather Waters

Date: 11 May 2020

Mode of transport	Details	Employment impacts	Access to training impacts
Road	<p>No plan B – one access in and out. Need to maintain roads and learn from experiences through 2020 fires</p> <p>Maintaining the road network is the Council's priority</p>	<ul style="list-style-type: none"> Locals can't get to work if road closed Visitors not able to access- reduces demand for visitor economy jobs Freight links being compromised diminishes the ability to get products in and out and therefore reduces jobs No B-Double route 	<ul style="list-style-type: none"> Need driver's licence or ride share arrangements
Air	<p>Fly in fly out workers – increasing reliance on air services</p> <p>Business need access to airport for executives e.g. Bega Cheese as well as some government agencies</p>	<ul style="list-style-type: none"> No access to air services would reduce supply of health workers Environmental impacts – fog, smoke from fires limited air access and could diminish employment opportunities – visual landing to sight runway required 	<ul style="list-style-type: none"> Opportunity for training at South East Regional Hospital impacted
Road	<p>Trainees in mechanical trades have to go to Wollongong for practical component of TAFE course</p>	<ul style="list-style-type: none"> Driver's licence or car-pooling to get to work 	<ul style="list-style-type: none"> Adds 2-3 days to the time out of the workplace by needing to go to Wollongong Take advantage of lessons learnt in COVID lockdown

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

			<p>and from better access to electronic delivery of courses</p> <ul style="list-style-type: none"> • Can mechanics on site take on the practical tutoring to eliminate travel needs?
Road	<p>Health services limitations – no public transport to and from Canberra Hospital which is the nearest category 5 hospital</p> <p>Having to rely on friends and family for transport to health services</p>	<ul style="list-style-type: none"> • Opportunity for a community transport option to add additional services • Share ride solution could create jobs 	
Air	<p>Bega Cheese initiatives to increase research and development and export via air</p> <p>15% of Bega Cheese costs are transport related</p>	<ul style="list-style-type: none"> • Potential to limit jobs growth in Research and Development • Potential to limit jobs maintenance if can't improve export transport 	<ul style="list-style-type: none"> • Opportunity to link with other educational institutions and lessen the need to travel outside of the region
Air	Premium product export market opportunity – could be out of Merimbula or out of Canberra (which could take advantage of international flights)	<ul style="list-style-type: none"> • Jobs growth opportunities if export markets are developed 	
Sea	<p>Opportunity to utilise the Port of Eden to potential for freight</p> <p>Niche agricultural markets including fishing, oysters</p>	<ul style="list-style-type: none"> • Jobs growth opportunities if export markets are developed • Employment in these sectors reliant on connections to national and international markets 	
Road	No B Double access to NSW (can't get past Narooma) but have access to Victoria	<ul style="list-style-type: none"> • Increased transport sector jobs if resolve limitations 	

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

	Unhooking B Doubles at Brown's Mountain	<ul style="list-style-type: none"> Potential jobs growth if industries get the inputs quicker and cost effectively by improving logistics 	
Rail	Won't ever get rail services at sufficient level – distances		
Road	Region will remain reliant on cars for transport		
Road	<p>The fires created an issue of lack of confidence in the region as it is isolated due to limited access points</p> <p>Concern that the sentiment may be that if residents can't get to health services, for example, they will leave the region</p> <p>Concept that is safer on Victorian border side than NSW side near border</p>	<ul style="list-style-type: none"> Limited service levels if the population falls will lead to reduced numbers of jobs Employment opportunities and connections to health services are needed to service the ageing population 	<ul style="list-style-type: none"> Opportunity to study locally is important to prevent youth from leaving the region TAFE / University /Country Campus provides the opportunity to do things locally and less need to travel outside of the region

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Eurobodalla Shire Council Interview

Attendees: General Manager Dr Catherine Dale, Director of Planning and Sustainability Services Lindsay Usher, Director of Infrastructure Services Warren Sharpe, Director of Community, Arts and Recreation Kathy Arthur

WRI: CEO Kathy Woolley, Project Manager Kathy Sloan, Administration Officer Heather Waters

Date: 18 May 2020

Mode of transport	Details	Employment impacts	Access to training impacts
Road	Wide spread location – 120km long in distance and 3 major towns	<ul style="list-style-type: none"> Impacts on the ability to get to work 	<ul style="list-style-type: none"> Impacts on the ability to get to training
Road	Drivers licence – generational disadvantage	<ul style="list-style-type: none"> Impacts on the ability to get to work Example of program they have been running for 2 years to assist in attaining 120 hours of driving on L plates 	<ul style="list-style-type: none"> Impacts on the ability to get to training
Air	Fly in fly out services – high for medical	<ul style="list-style-type: none"> Medical services rely on this – will change with new hospital the Eurobodalla Regional Hospital – increased demand likely for fly in fly out workers 	
Road	Visitor economy is reliant on the Kings Highway (most via this) and Princes Highway.	<ul style="list-style-type: none"> 1/3 GDP is reliant on the visitor economy Growth of Canberra and SW Sydney will provide significant growth opportunities and employment demand 	
Walking / Cycleways	<p>Movement around the town</p> <p>Lack of pathways – connection and safety issues</p>	<ul style="list-style-type: none"> Improved access for the CBD and safety for cyclists and pedestrians enables people to get to work – particularly younger workers 	

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

	Strategic Plan in place to increase the pathways connections, improve lighting	<ul style="list-style-type: none"> Children are reliant on parents dropping them off – more cycling/walking will improve their access to work 	
Road	Strategic plan in place for the whole transport network – focus on safety	<ul style="list-style-type: none"> Growth in the whole network 47% of crashes on 9% on the roads 	
Road	<p>No B Double Access</p> <p>Limitations at Bateman's Bay bridge and Nelligen Bridge- need to remove these impediments</p>	<ul style="list-style-type: none"> Limits employment and investment options as supply chain compromised Improve the supply chains across the region and drive jobs growth 	
Road	<p>Children need to access training in Wollongong/ Canberra/ Nowra</p> <p>Apprenticeships not taken up locally as can't get to practical training nor to work locations – low income prohibits getting own car.</p>	<ul style="list-style-type: none"> Parents need to take time off to drive their children to attend TAFE – impacts on their employment Children cycling to access training 	<ul style="list-style-type: none"> Training not available in the local region Cost of travel if they have their own car – plus accommodation costs prohibitive
Road	<p>There are 290 minibuses in the Shire (reference from TfNSW) however, they allocated for a specific purpose – opportunity to use for multiple purposes</p> <p>Lots of clubs, schools have vehicles that are underutilised</p> <p>No coordination of transport – for e.g. community transport and Anglicare on same journey but limited passengers – facilitate sharing services</p> <p>Capital costs associated with the buses is large however they are sitting idle as they</p>	<ul style="list-style-type: none"> Prohibited to use community transport funded services for transport for businesses/to get people to work Many seats are available 	

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

	can only be used for the program they are funded for.		
Road	<p>Drivers licenses – difficult to get, generational issues, even if get license, hard to access a car due to expense</p> <p>Council has created the Ydrive Program – NSW Government grant. Provides opportunity to get 20 hours of experience. 3 vehicles – 2 were donated by car yard and third bought with funding. Volunteer/mentors do the co-driving. Mechanics from the Council depots provide some help with how to look after the car. Mentors have continued to develop relationship after driving sessions. Mentors are reference checked. Council to provide some more details on the project</p>	<ul style="list-style-type: none"> • Access to employment 	<ul style="list-style-type: none"> • Access to education and training
Air	<p>Impacted by COVID shutdown – non-existent REX services</p>	<ul style="list-style-type: none"> • Inability to get Fly in Fly out workers to the region • Impact of visitor economy reduces demand for hospitality jobs 	

Shoalhaven City Council Interview

Attendees: Mayor Amanda Findley, CEO Stephen Dunshea, Economic Development Manager Greg Pullen

WRI: CEO Kathy Woolley, Project Manager Kathy Sloan, Administration Officer Heather Waters

Date: 11 May 2020

Mode of transport	Details	Employment impacts	Access to training impacts
Road	<ul style="list-style-type: none"> Limited access to public transport South Coast relies on having a private car – some people can't afford a car, and some don't have a driver's licence Frequently only driver in cars Hitch hiking is common, particularly to get to the highway from towns/villages – 49 villages/towns across the region attached to 120km Highway length – consider a hub and spoke system to connect to Highway suggested High level of youth unemployment Services limited – e.g. aged have a long and tiring day to access public 	<ul style="list-style-type: none"> Unemployment as people can't get to jobs or interviews Lack of public transport options limits ability for some to participate in employment processes Need for learn to drive – perhaps delivered in schools as part of curriculum – subsidise hours to get license rather than having to do through jobs network Salt Ministries – help with the homeless communities – drivers licenses Drivers licence is essential part of employability – costs of hours of on road driving on L Plates as part of the employment costs issues Demand for services offered by businesses diminished as shoppers can't easily get to their locations – leading to pressure 	<ul style="list-style-type: none"> Dropout rate is high in some of the courses as students do not have transport home (e.g. TAFE course finishing at 6pm after bus has left) Vincentia High School – VET program 2 years ago – transport to Nowra to attend courses is a possible model

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

	transport due to limited options	on jobs and possible reductions/limited growth opportunities for new jobs	
Road	<ul style="list-style-type: none"> Studying out of the region for practical components – e.g. TAFE courses with partial delivery in Wollongong 		<ul style="list-style-type: none"> Students needing to study in another region e.g. Wollongong – stay overnight to ensure that they could do placement work is prohibitive to commit to training – reliance on staying with friends to afford the trip Low level of driver's licenses and access to cars makes accessing training difficult, particularly for younger people
Road	<ul style="list-style-type: none"> Bus to Bay area leaves late at night (or after dark), takes a long time and some concerns about feeling safe Bus from Ulladulla to Bawley Point takes 2 hours and costs \$12 – long day and expensive 	<ul style="list-style-type: none"> Inability to get to and from work in cost effective manner increases non-attendance/applications for vacancies 	<ul style="list-style-type: none"> Access limitations mean increased inability to attend training
Road	<ul style="list-style-type: none"> Concern that previous transport trials have impacted on private bus services need to ensure the existing services are considered in any solutions for new transport options 		

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

Road	<ul style="list-style-type: none"> Community Transport is run by a Non-Government Organisation – this works well however it does not currently transport people to work 	<ul style="list-style-type: none"> An expansion of the service may offer transport options to get people to work 	<ul style="list-style-type: none"> An expansion of the service may offer transport options to get people to training
Road	<ul style="list-style-type: none"> Significant low socio-economic population Low rate base Demand for services outstrips the availability of services – not able to deliver more transport services 		
Road	<p>Alternative solutions of transport</p> <ul style="list-style-type: none"> “Fruber” idea – free Uber type service Northern Sydney beaches door to door service model – TfNSW service On demand transport services Driverless buses – have been trialled in other areas – e.g. Armidale 		

APPENDIX 5: CONSULTATION

SUMMARY

	Organisation	Stakeholder Group	Interview Type
1	Shoalhaven City Council	Local Government	Group Interview
2	Eurobodalla Shire Council	Local Government	Group Interview
3	Bega Valley Shire Council	Local Government	Group Interview
4	Shoalhaven City Council	Economic Development	Interview
5	Eurobodalla Shire Council	Economic Development	Interview
6	Bega Valley Shire Council	Economic Development	Written Feedback
7	Campbell Page	Project Sponsor	Interview
8	Campbell Page	Employment Agency	Group Interview
9	Kardia HR	Recruitment	Interview
10	Campbell Page / Mission Australia/ Kardia HR / APM	Employment /Recruitment	Group Interview
11	Mission Australia	Employment Agency	Interview
12	Workability	Disability Employment Service	Interview
13	Department of Regional NSW	NSW Government	4 Individual Interviews
14	Transport NSW	NSW Government	Interview
15	RDA FSC	Independent NFP Organisation	Group Interview
16	Corporate Connexions	Indigenous Organisation	Interview
17	Katungul Aboriginal Corporation Regional Health and Community Services	Indigenous Organisation	Interview
18	Walan Miya	Indigenous Organisation	Interview
19	Department of Education	Education	Interview
20	TAFE NSW	Education	Interview
21	University of Wollongong – Nowra Campus	Education	Interview
22	University of Wollongong Innovation Hub - Bega	Education	Interview
23	Far South Coast Employment Facilitator	Federal Government	Interview
24	2pi Software	Employer / Youth	Interview
25	Shoalhaven City Council	Youth	Interview
26	Eurobodalla Shire Council	Community	Interview
27	Port Authority of New South Wales	Business	Business Survey Distributed

REGIONAL DEVELOPMENT AUSTRALIA FAR SOUTH COAST

	Organisation	Stakeholder Group	Interview Type
28	Secretary of the Sussex Inlet Business Chamber	Business	Business Survey Distributed
29	Global Defence Business	Business	Business Survey Distributed
30	Berry Chamber of Commerce and Tourism	Business	Business Survey Distributed
31	Culburra Beach Chamber of Commerce and Tourism	Business	Business Survey Distributed
32	Huskisson Chamber of Commerce and Tourism Inc.	Business	Business Survey Distributed
33	Shoalhaven Business Chamber	Business	Business Survey Distributed
34	SBC Southern Area Committee Milton/Ulladulla	Business	Business Survey Distributed
35	Sussex Inlet Chamber of Commerce Inc	Business	Business Survey Distributed
36	Batemans Bay Business and Tourism Chamber	Business	Business Survey Distributed
37	Moruya Chamber of Commerce	Business	Business Survey Distributed
38	Narooma Chamber of Commerce	Business	Business Survey Distributed
39	Bermagui Business Chamber	Business	Business Survey Distributed
40	Tuross Head Business Owners Assn Inc	Business	Business Survey Distributed
41	Bega Chamber of Commerce	Business	Business Survey Distributed
42	Merimbula Area Chamber of Commerce	Business	Business Survey Distributed
43	Mogo Chamber of Commerce	Business	Business Survey Distributed
44	Eden Chamber of Commerce	Business	Business Survey Distributed

APPENDIX 6: SURVEY RESULTS

The first survey was distributed to all business chambers across the 3 LGAs as well as other businesses identified by RDA FSC. In all, 22 responses were received.

Impact on Employment

Business survey respondents were asked to rate the impact a range of transport issues had on access to employment in the Far South Coast region.

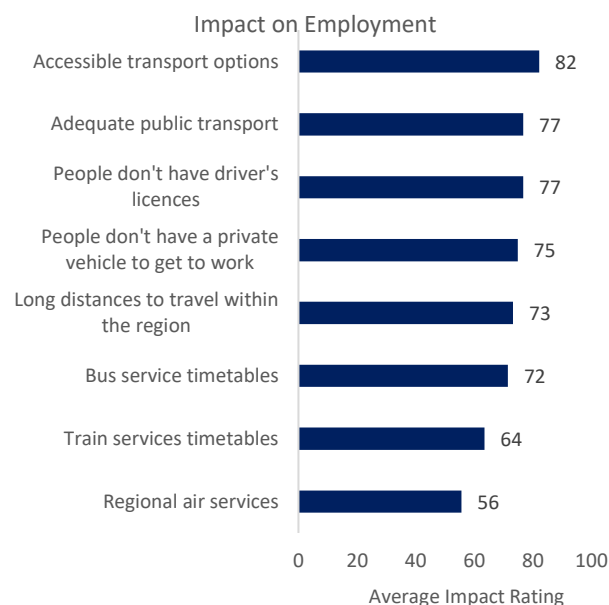
The respondents were asked to provide a rating between 0 (little impact) and 100 (significant impact). The responses were averaged and are shown on the opposite graph. The higher the result, the more significant the impact.

The transport related issues reported to have the most significant impact on employment were:

- Accessible transport options
- Adequate public transport
- Driver's licences.

Respondents were asked if there were any other transport issues impacting access to employment. The following responses were provided:

- Cost of fuel (2)
- Road conditions and weight restrictions limiting freight (2)
- Cost of vehicle registration and maintenance (1)
- People living in remote locations - especially young people (1)
- Reliance on parents to drive young people (1)



Improve Transport Infrastructure

Business survey respondents were asked if they had any suggestions to improve the transport infrastructure for work or training in the region. The following suggestions were provided:

More bus services or services at better times (6 respondents)

- more buses timed with normal work hours
- a free shuttle bus between the Bomaderry railway station, the hospital, the university and town centre
- bus service from Ulladulla to Nowra town centre with shuttles from villages to the highway
- co-ordination and frequency
- Bus hub stations and routes with associated business hours timetable
- Public transport should be more readily available for trades and trainees, at suitable hours

Additional smaller or shuttle buses (5 respondents)

- a free shuttle bus between the Bomaderry railway station, the hospital, the university and town centre
- travel hub similar to Northern beaches. Parking hub, then shuttle bus service
- a number of 8 to 12-seater buses that frequently move along a route connecting workplaces, towns, education facilities throughout the working week
- move to smaller buses with more routes
- free shuttle bus loop in Nowra

Other suggestions

- Increased subsidies for buses
- More promotion of public transport
- Extend the rail line
- Develop a carpool or ride sharing scheme
- Implement programs to assist people attaining their driver's licence
- Improve the heavy vehicle routes to assist with employment
- More local training courses will reduce the need for young people to travel outside of the region

Impact on attendance at training and education

Business survey respondents were asked to rate the impact a range of transport issues had on attendance at training and education in the Far South Coast region.

The respondents were asked to provide a rating between 0 (little impact) and 100 (significant impact). The responses were averaged and are shown on the opposite graph. The higher the result, the more significant the impact.

The transport related issues reported to have the most significant impact on attendance at training and education were:

- Adequate public transport
- Access to private vehicles
- Accessible transport options
- Long distances within the region

Respondents were asked if there were any other transport issues impacting access to employment. The following responses were provided:

- Cost of fuel
- No access to transport after hours to attend training
- Transport to metropolitan areas is difficult and expensive.

Impact on Education and Training



Location specific transport issues

Business survey respondents were asked if there were any specific transport issues that impact on town or village where they employed people. The following responses were provided:

Shoalhaven LGA

- South Nowra Industrial area - too few public transport options
- Nowra and the industrial areas need an alternative heavy vehicle route to Kangaroo Valley and Mt Ousley i.e. MR92
- Burrier - no bus service
- Illaroo - no public transport services
- Bay and Basin no regular bus service to Nowra matching standard business hours
- Termeil - no bus

Eurobodalla LGA

- Tuross Head - no bus service
- Mogo - no bus
- All towns and villages in the Eurobodalla Shire do not have sufficient bus services to move people around the shire flexibly (time and place), to get them to work or education
- Eurobodalla Shire has no train service therefore in support of youth, trainees, unemployed, low income workers the area needs a dynamic and flexible bus service.
- Moruya Industrial Area - Shelley Road Moruya - no bus service
- Whole of Eurobodalla - very limited bus services - no other methods available outside of school service and independently owned taxi service

Region wide

- Young trainees working in construction start 7am, cafe workers have staggered shifts, childcare workers start early. Without flexible public transport workers in these industries are unable to get to work due to the travel distances required.

Services provided to assist employees

Respondents were asked to list any services they provided to assist with helping employees get to work or training. The following responses were provided.

- Support client costs to attend training
- Provision of a work vehicle once at work
- Bus to assist clients to get to site for training
- Carpooling / Car Share
- Some staff are entitled to vehicles as part of their employment package
- Drive children to ACT for training as an electrician and to Batemans Bay for work

Other comments

Other comment received about transport infrastructure and its impact on employment and / or education and training in the region were:

- It needs to improve so that everyone in our community has access to employment and education/training. And so that our businesses can fill positions and be confident that transport issues are not going to be a hindrance to their workers being able to sustain working.
- Apart from the fact that the transport infrastructure is virtually non-existent
- Investigating sustainable private enterprise models that can provide employment as well as transport for locals. Collaborative transport initiatives between all education providers – University of Wollongong, TAFE, Registered Training Organisations, schools
- Many families need several vehicles for everyone in the household to participate in work or education. This is a huge economic impost on families - particularly those with low economic status and it compounds disadvantage.
- Our region has very little training facilities for trades persons and there is very little transport to all major centres for training and work
- Unsealed roads
- Make public transport sexy to our youth - work with councils and schools in small regional towns to develop a culture of shared transport - a campaign supported by phone aps including Opal to make public transport sexy and top of mind - young people love a cause so could build a campaign on environment and social connection, especially following the fires and COVID-19 isolation impacts.

The second business survey was aimed at people that were unemployed, those seeking a different job or those attending training or education. The survey was distributed by employment agencies and other stakeholders involved in the interviews. It should be noted that only 12 responses were received so the results should be read with caution.

Looking for work

The key results were:

- 5 respondents were unemployed and looking for work
- 3 respondents had been seeking work for 1-3 months, the others did not provide a response
- 3 respondents attended job interviews or the employment agency by driving themselves, 1 person had someone else drive them
- 2 respondents reported that transport issues had prevented them from attending a job interview or employment. These issues were:
 - The bus did not come to my area often enough or in the required timeframe for me to attend my employment
 - Was unable to get any transport, personal or public

- 2 respondents held a full driver's licence, 1 respondent had a Provisional 1 licence

Attending education or training

The key results were:

- 6 respondents were attending education or training
- 2 were enrolled in a Certificate III or IV course, 1 was enrolled in a Diploma level course, 1 was in Year 10 and 1 was enrolled at the Flexible Learning Centre
- 2 respondents were accessing the course online and 3 were attending face to face classes
- Of the students that were attending face to face classes, 2 respondents indicated that it was not possible to access the course online
- 3 respondents indicated that transport issues had prevented them from getting to training or education. These issues were:
 - I did not have a license and there was no transport
 - bus timetable not current to school timetable
 - Minimal public transport and or timetable too erratic, plus cost too high

Improvements to transport for work or education and training

Respondents were asked if they had any suggestions that would improve transport to get to work or education and training in their region. The suggestions included:

- Additional buses, longer routes, more frequent services (6 respondents)
- Cheaper fares on public transports (3 respondents)
- Extended rail line (2 respondents)

WRI CAPABILITY

Ms Kathy Woolley – Chief Executive Officer

GAICD, MIIA, Change Management Qualification (AGSM), BComm (Economics (with merit) - UWO), Public Participation Certificate (IAP²), Certificate IV Workplace training and assessment (TAFE)

Kathy joined the WRI team in February 2018 having previously worked on a variety of boards and senior management roles across sectors including media, health, education, regional development, government, event management, research and sales.

For a number of years Kathy also ran a consultancy specialising in services for not for profit entities, focusing on best practice techniques in management and governance.

With formal qualifications in change management, company directorship, community engagement, economics and training, and well developed skills in human resources, information technology, finance and economic development, Kathy offers a unique skill set to assist with most business needs.

Kathy is a member of the Australian Institute of Internal Auditors and has developed internal audit and process improvement frameworks for a number of organisations.

Ms Kathy Sloan – Project Manager

BAppSci (Applied Geography) Canberra, Graduate Diploma Information System (CSU), Diploma of Management (Skillset), Member of the Research Society

Kathy is an experienced researcher in the public, private and not-for-profit sector and has wide-ranging skills in data analysis, designing and conducting surveys, community consultation and facilitation, project management and quality assurance.

Kathy has worked regionally for over 25 years developing a wide business network across the local government, agribusiness, education and health sectors.

As an independent consultant Kathy has completed a range of community and business consultation sessions, a needs analysis for a regional health provider, economic and social impact assessments and a range of economic analyses supporting grant funding applications. Kathy also provides data analysis, reporting and evaluation services for a number of schools across the Western region.

Mr Chris Mullen – Research Officer

BEcon (UNE)

Chris is an Economics graduate from the University of New England and is currently undertaking a Master of Economics course. Chris has a great interest and passion for macroeconomics and microeconomics, policy analysis and regional development economics. Throughout his undergraduate degree Chris has gained skills in benefit cost analysis, business statistics and economic modelling. Having grown up on a property on the mid-north coast, Chris has a strong understanding of life in regional Australia and the issues rural communities face.

Ms Dale Curran – Executive Officer

BA (ANU)

Dale is responsible for all administrative processes at WRI including executive support, finance maintenance of policies. She also works on research tasks and in particular in the community consultation projects. Dale has worked in a variety of roles at WRI including Fieldwork Supervisor and Research Assistant. As a result, she provides a strong understanding of research processes to her variety of roles. Dale brings a high level of organisational skill and efficiency to her role as Executive Officer.

Ms Heather Waters - Administration Officer

Certificate III – Business (Australian College of Commerce and Management)

Heather brings strong skills in customer service from her experience working in the retail industry. Heather is passionate about building strong rural communities.

