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# Regional profile

Southern Region

A project undertaken as part of the NSW  
Comprehensive Regional Assessments

November 1999

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# REGIONAL PROFILE

## Southern Region New South Wales

A project undertaken for  
the Joint Commonwealth NSW Regional Forest Agreement Steering Committee  
as part of the  
NSW Comprehensive Regional Assessments  
project number NS 10/ES

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The project has been overseen and the methodology has been developed through the Social and Economic Technical Committee which includes representatives from the New South Wales and Commonwealth Governments and stakeholder groups.

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# 1. BACKGROUND

Project NS 10/ES Post Impact Studies and Regional Profile was approved at the Senior Officers Meeting 19 August 1998 and by the Resource and Conservation Assessment Council (RACAC) in September 1998. The objectives of the project were:

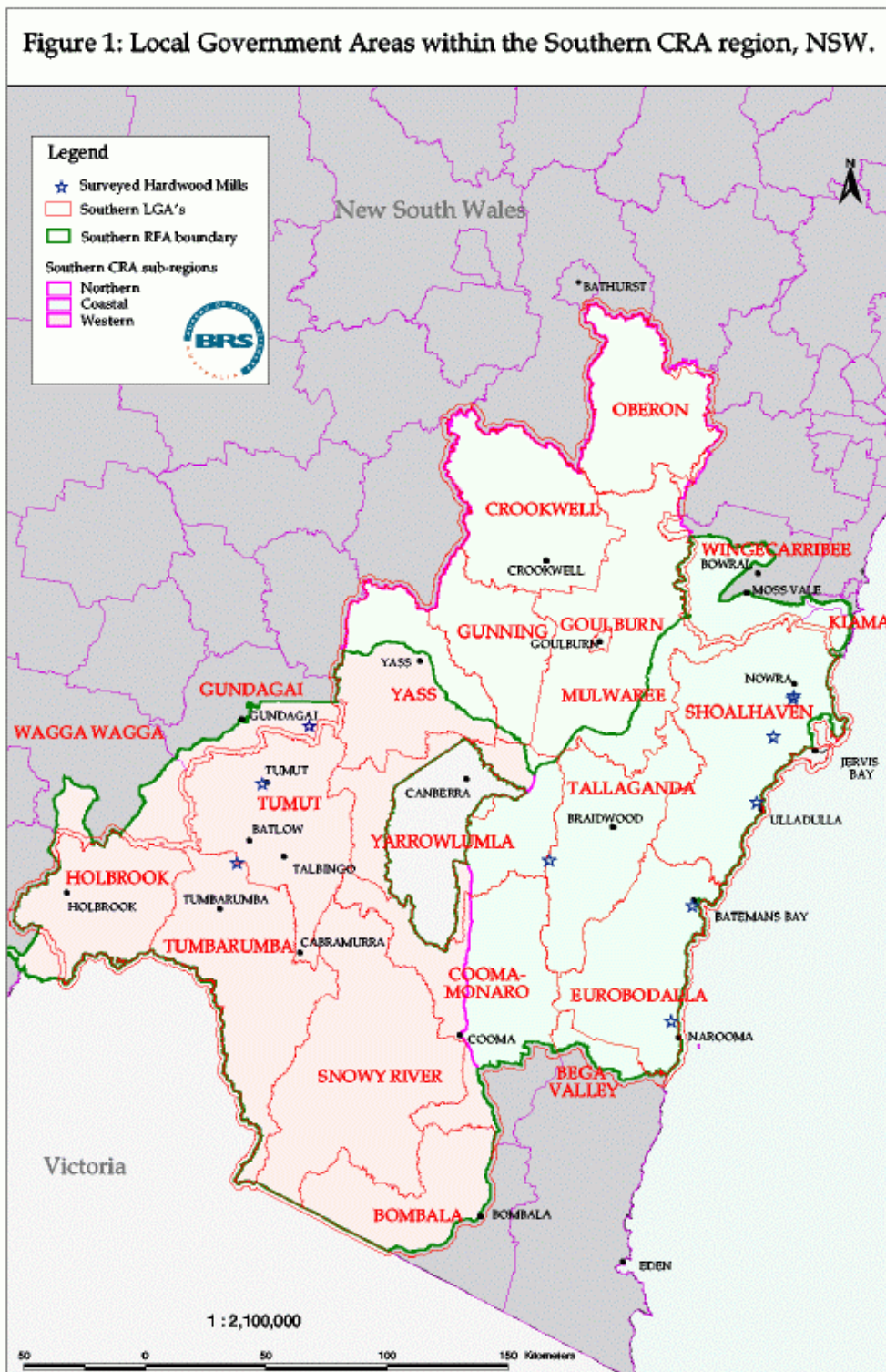
- to provide a review of social impact studies conducted in the Southern Region;
- to develop a regional profile for the Southern forest region; and
- to address Scoping Agreement Clause 10.

The report includes demographic profiles and analyses of local government areas (LGAs) in the region and a sub-regional analysis. (Map 1a on the following page illustrates the distribution of the Southern Region LGAs and the boundaries for the sub-regions).

The Southern Comprehensive Regional Assessment Area (CRA) of New South Wales extends over twenty-seven Local Government Areas (LGAs). It includes all or part of the Bega Valley, Bombala, Cooma-Monaro, Crookwell, Culcairn, Eurobodalla, Goulburn, Greater Lithgow, Gundagai, Gunning, Holbrook, Hume, Kiama, Mulwaree, Oberon, Queanbeyan, Shellharbour, Shoalhaven, Snowy River, Tallaganda, Tumbarumba, Tumut, Wagga Wagga, Wingecarribee, Wollondilly, Yarrowlumla, and Yass LGAs.

Ten of the above LGAs were **not included** in the Regional Profile because they were either covered in-depth as part of the South East NSW RFA, the major population centre occurred outside the Southern Region, or they contained no hardwood forests and no major centres of population. These LGAs are Bega Valley, Bombala, Culcairn, Greater Lithgow, Gundagai, Hume, Shellharbour, Wagga Wagga, Wingecarribee and Wollondilly.

The Southern region has three distinct forestry regions. The majority of native forest harvesting occurs within the coastal sub region. In the western subregion native forest harvesting occurs in the Tumut and Tumbarumba areas, and in the northern sub region much of the harvesting of native forests occurs on private land.





## 2. LGA PROFILES

### 2.1 COOMA-MONARO LGA

In this study all but the south east corner of the LGA is covered <sup>1</sup>

The Cooma–Monaro LGA is located centrally between the South Coast, the Australian Alps and the ACT and covers an area of 4 926 square kilometres. In 1996 the population was 9 680, a decrease of -0.85 % since 1991 (9 763 people).

Major industries are retail trade (16.9%), agriculture, forestry and fishing (10.7%), health and community services (9.2%), property and business services (9.0%) and accommodation, cafes and restaurants (6.7%). The rapidly developing tourist industry focuses on the Australian Alps, trout fishing and the Snowy Mountains Hydro Electricity Scheme.

Public forests in this LGA include Glen Fergus State Forest and part of Badja State Forest. Badja Swamps and Scabby Range Nature Reserve are also included. Wadbilliga National Park and part of Kosciusko National Park also lie within the LGA.

### 2.2 CROOKWELL LGA

Crookwell LGA is located in the north east of the Southern Region CRA study area, and covers an area of 3 439 square kilometres. In 1996 the population was 4 250, a decrease of -1.02% since 1991 (4294 people).

Crookwell is the major service centre for the LGA. Other communities include Bigga, Binda, Graben Gullen, Laggan and Tuena.

Major industries are agriculture, forestry and fishing (39.9%), retail trade (9.2%), health and community services (7.9%), education (6.7%), and construction (5.0%).

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<sup>1</sup> Although not all of the Cooma Monaro LGA falls within the Southern Region boundary, its major population centre and forested areas do fall within the boundary. Therefore, whole LGA data has been included in this study.

Public forests in this LGA include Razorback Nature Reserve, Keeverstone State Forest and Tarlo River National Park.

### **2.3 EUROBODALLA LGA**

The Eurobodalla LGA is located along the 110 kilometre stretch of the NSW coast between Durras and Wallaga Lake and covers an area of approximately 3 400 square kilometres. In 1996 the population was 30 447, an increase 12.26 % since 1991 (27 121 people).

Major urban centres in the LGA include Batemans Bay, Moruya and Narooma.

Major industries are retail trade (19.6%), health and community services (11.5%), accommodation, cafes and restaurants (10.7%), construction (8.6%) and education (7.5%). This LGA is a major retirement destination.

Public forests encompass approximately 80% of the area and include Broulee Island Nature Reserve, part of Budawang and Deua National Parks, Eurobodalla National Park and Bodalla Dampier, Wandera, Mogo, Bolaro, Benandarah, Boyne, Buckenbowra, Quart Pot, Mungerarie, Corunna, Moruya and Currowan State Forests.

### **2.4 GOULBURN LGA**

The Goulburn LGA is completely surrounded by the Mulwarree LGA and lies in the north of the region. Covering only 54.52 square kilometre it is the second smallest LGA in the area. In 1996 the population was 21 293 a decrease of 0.74% since 1991 (21 451 people).

Major industries are retail trade (15.6%), health and community services (13.4%), personal and other services (11.8%), manufacturing (11.1%) and transport and storage (7.1%). The LGA is a principal educational centre in the south east region of NSW.

No public forests are located in this LGA.

### **2.5 GUNNING LGA**

Gunning LGA is located in the central north of the study area and covers an area of 2 210 square kilometres. In 1996 the population of the LGA was 2 211 persons, an increase of 4.74% since 1991 (2 111 people).

Gunning is the major service centre for the LGA. Other communities include Collector, Dalton, and Gundaroo.

Major industries are agriculture, forestry and fishing (32.3%), government administration and defence (10.5%), property and business services (8.0%), retail trade (6.8%) and health and community services (6.7%).

No public forests are located in this LGA. There are two nature reserves Muddoonen Nature Reserve and Wet Lagoon Reserve. Lake George is a prominent feature of the landscape in this LGA.

## **2.6 HOLBROOK LGA**

Holbrook LGA is located on the south west slopes and plains of NSW covering 2 590 square kilometres between Kyema Gap in the North, the Murray River in the south and Yambula Ridge in the West. In 1996 the population was 2 529 persons, a decrease of -3.18% since 1991 (2 612 people).

Major industries are agriculture, forestry and fishing (36.0%), retail trade (11.9%), health and community services (7.1%), government administration and defence (6.7%) and transport and storage (6.6%).

Public forests in this LGA include Woomargama State Forest and part of Carabost State Forest.

## **2.7 KIAMA LGA**

Kiama LGA is located in the north east of the study area and is bordered on one side by the sea and on the other side by the rugged Minamurra Rainforest. The LGA covers an area of 25 767 square kilometres. In 1996 the population was 17 706, an increase of 11.30% since 1991 (15 908 people). This LGA had one of the highest growth rates of the LGAs covered in this study.

Kiama is the major service centre in the LGA. Other communities include Jamberoo, Gerringong, and Gerroa.

Major industries are education (13.4%), retail trade (13.2%), health and community services (10.8%), construction (9.8%) and manufacturing (9.6%).

Public forests in this LGA include Budderoo National Park, Minnamurra Rainforest and Barren Ground Nature Reserve.

## **2.8 MULWAREE LGA**

Mulwaree LGA is located at the north east of the Southern Region study area and encapsulates the Goulburn LGA, covering an area of 5 203 square kilometres. In 1996 the population was 5 625, an increase of 4.83% since 1991 (5 366 people).

This LGA has no large population centre. The seven largest settlements have populations of less than 500. They are Marulan, Marulan South, Lake Bathurst, Bungonia, Tallong, Tarago and Taralga.

The major industries are agriculture, forestry and fishing (22.0%), retail trade (10.9%), health and community services (10.8%), construction (9.8%) and education (6.6%). Goulburn LGA is a major source of employment for residents in this area.

Public forests in this LGA include Bungonia State Recreation Area, part of Morton and Blue Mountains National Parks, Tarlo River National Park and Wingello State Forest. The area is part of the Hawkesbury Nepean water catchment.

## **2.9 OBERON LGA**

Oberon LGA is located in the central tablelands on the western side of the Great Dividing Range. In 1996 the population was 4 608, an increase of 8.22% since 1991 (4 258 people).

Major industries are manufacturing (22.7%), agriculture, forestry and fishing (21.1%), construction (10.1%), retail trade (7.3%) and accommodation, cafes and restaurants (6.2%).

Public forests in this LGA include Vulcan, Essington, Lowes Mountain, Hampton, Blenheim, Jenolan and Gurnang State Forests. Kanangra Boyd National Park and part of Blue Mountains National Park cover a significant part of the LGA. Jenolan and Wombeyan caves tourist areas are also within this LGA.

## **2.10 QUEANBEYAN LGA**

Queanbeyan LGA is adjacent to the ACT. It is the smallest of the LGAs with an area of 52 square kilometres. In 1996 the population was 27 414, an increase of 9.91% since 1991 (24 942 people).

Major industries are government administration and defence (17.2%), retail trade (13.6%), property and business services (10.6%), construction (8.9%) and manufacturing (8.4%).

No public forests are located in this LGA.

## **2.11 SHOALHAVEN LGA**

The Shoalhaven LGA covers an area of around 4 660 square kilometres along the NSW coast. Nowra is the major service centre for the LGA. In 1996 the population was 76 726, an increase of 12.36% since 1991 (68 287 people).

Other communities include Berry, Shoalhaven Heads, Bomaderry, Vincentia, Huskisson, Kangaroo Valley, Greenwell Point, Milton/Ulladulla and HMAS Albatross.

Major industries are retail trade (17.3%), manufacturing (10.8%), health and community services (10.0%), construction (9.3%) and government administration and defence (8.9%).

Public forests in this LGA include 23 state forests and 13 conservation reserves.

## **2.12 SNOWY RIVER LGA**

The Snowy River LGA is located on the Southern Tablelands of NSW and is bounded in the south by the Victorian border, in the north by the Murrumbidgee River, in the east by the Snowy River, and in the west by the Kosciusko Range. It covers an area of around 6 059 square kilometres and is the largest LGA covered in this study. In 1996 the population was 17 697, an increase of 3.86% since 1991 (17 039 people).

There are several major urban centres in this LGA including Perisher Valley, Thredbo, Berridale, Adaminaby, Dalgety and Jindabyne.

Major industries are accommodation, cafes and restaurants (22.4%), property and business services (11.6%), retail trade (10.8%), construction (6.9%) and health and community services (6.6%).

Public forests in this LGA include Ingebirah and Mowamba State Forests, part of Pilot and Byadbo Wilderness Areas. Part of Kosciusko National Park also lies within the LGA.

## **2.13 TALLAGANDA LGA**

Tallaganda LGA is located on the Southern Tablelands of NSW and has an area of around 3351 square kilometres. In 1996 the population was 2 420 a decrease of -1.79% since 1991 (2 464 people).

Communities in the LGA include Tallaganda, Araluen, Braidwood, Mongarlowe, Nerriga and Majors Creek.

Major industries are agriculture, forestry and fishing (30.3%), retail trade (10.0%), government administration and defence (9.9%), accommodation, cafes and restaurants (8.0%) and health and community services (6.9%).

Public forests in this LGA include Tallaganda, Bendoura, Berlang and Monga State Forests. Budawang, Deua and Morton National Parks are also part of the LGA.

## **2.14 TUMBARUMBA LGA**

Tumbarumba LGA boundaries lie between Laurel Hill in the north to the Murray River and the NSW/Victoria border in the south. The Great Dividing Range and Jingellic mark the east and west boundaries. The LGA covers an area of almost 4 380

square kilometres. In 1996 the population was 3 613, a decrease of -1.98% since 1991 (3 686 people).

Tumbarumba is the major urban centre in the LGA. Other communities include Khancoban, Rosewood and Jingellic.

Major industries are agriculture, forestry and fishing (33.4%), manufacturing (11.4%), retail trade (9.2%), electricity, gas and water supply (6.9%) and education (6.6%).

Public forests in the LGA include Ournie, Manus and Mrangle State Forests and parts of Bago and Green Hills State Forests. The Kosciusko National Park covers 45% of the LGA. This includes the Jagungal Wilderness area.

## **2.15 TUMUT LGA**

Tumut LGA includes a large proportion of the Australian alpine and sub-alpine area and covers an area of 3 767 square kilometres. In 1996 the population was 10 951 a decrease of -2% since 1991 (11 175 people).

Tumut is the major service centre for the LGA. Other communities include Batlow, Adelong, Cabramurra and Talbingo. Major industries are agriculture, forestry and fishing (21.6%), manufacturing (16.7%), retail trade (11.9%), health and community services (6.7%) and education (6.6%).

This LGA also contains one of the State's largest softwood plantations and processing operations.

The Snowy Mountains Hydro-Electricity Scheme and Yarrangobilly Caves are both significant tourist attractions in the area.

Public forests in this LGA include Buccleuch, Tumbalong, Eilerslie, Tumut and Minjary State Forests. Bimberi Nature Reserve, Scabby Range Nature Reserve and part of Kosciusko National Park including Bogong Peaks Wilderness Area are also located in this LGA.

## **2.16 YARROWLUMLA LGA**

Yarrowlumla LGA surrounds the ACT and is divided into two distinct sections, the eastern section and the western section. The eastern section covers an area of 1 930 square kilometres, and the western section an area of 1 042 square kilometres. In 1996 the population was 9 186, an increase of 14.97% since 1991 (7 990). This LGA had the highest population growth of those covered in this study.

Communities located in the eastern section include Bungendore, Captains Flat, Burra, Hoskinstown, Michelago, Sutton, Radcliffe, Wamboin and Williamsdale.

Major industries are government administration and defence (16.4%), property and business services (11.4%), retail trade (11.1%), education 9.1% and construction (8.1%).

Public forests in this LGA include part of Tallaganda State Forest. Gorooyaroo Nature Reserve, Tinderry Nature Reserve, Bimberi Nature Reserve, and Dingo Flats Wildlife Refuge are included. Parts of Kosciusko and Brindabella National Parks are also located in this LGA.

## **2.17 YASS LGA**

Yass LGA is located in the central north of the study area and covers an area of 3 297 square kilometres. Other communities include Murrumbateman, Bowning, Binalong, Wee Jasper and Bookham. In 1996 the population was 9 128, an increase of 3.96% from 1991 (8 780).

Major industries are agriculture, forestry and fishing (15.7%), retail trade (14.4%), government administration and defence (10.6%), property and business services (8.4%) and health and community services (7.9%).

Public forests include part of Buccleuch State Forest, Burrinjuck Nature Reserve and State Recreation Area and Mundoonen Nature Reserve. Wee Jasper National Park and part of Brindabella National Park are also located in this LGA.

# 3. ANALYSIS OF DEMOGRAPHIC CHARACTERISTICS

## 3.1 POPULATION

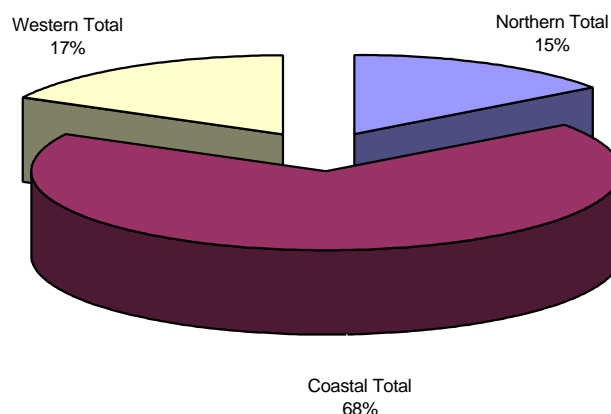
The ABS 1996 Census of Population and Housing figures showed that 255 484 persons lived in the Southern Region RFA study area and was approximately 4% of the NSW 1996 population. The figure is an overestimate for it also includes visitors to the NSW ski fields in the west of the region (particularly in the Snowy River LGA) and tourists to the coastal areas. (Other figures provided below may also be influenced by these factors).

Between 1986 and 1996 the population for the whole of the Southern region increased by 26%. However, between 1991 and 1996 the population increased by only 8%, suggesting slowed growth during the latter five year period. Despite this it remained above the NSW growth rate of 5% for the 1991-1996 period.

Three sub-regions: northern, coastal and western, form the Southern RFA region. The coastal region had the highest concentration of people (68%) and the highest growth rate during the 1991-1996 period (11%). This was almost double the NSW rate and reflected the popularity of the Eurobodalla, Shoalhaven and Kiama LGAs as retirement and dormitory areas. In 1996, over 30% of the population of the Southern Region study area resided in the Shoalhaven LGA (76 726 persons).

The most significant population growth during the 1986-1996 period was recorded in the Snowy River LGA (100%) in the western sub-region. However, the results were probably skewed due to the influx of visitors on Census night (Skewed population figures have been noted by the Snowy River Shire Council. In 1998 they estimated that 6 280 lived in the Shire). Yarrowlumla LGA experienced the second largest population increase between 1986 and 1996 (52%).



**FIGURE 3A: PROPORTION OF POPULATION IN SOUTHERN REGION SUB-REGIONS****TABLE 3A: POPULATION SOUTHERN REGION SUB-REGIONS, 1986 TO 1996**

LGA	1986	1991	1996	% change 1986-1996	% change 1991-1996	LGA as % of Southern Region
<b>Northern sub-region</b>						
Crookwell	4 262	4 294	4 250	-0.28	-1.02	1.66
Goulburn	21 552	21 451	21 293	-1.20	-0.74	8.33
Gunning	1 989	2 111	2 211	11.16	4.74	0.87
Mulwaree	4 923	5 366	5 625	14.26	4.83	2.20
Oberon	3 845	4 258	4 608	19.84	8.22	1.80
<b>Northern total</b>	<b>36 571</b>	<b>37 480</b>	<b>37 987</b>	<b>3.87</b>	<b>1.35</b>	<b>14.87</b>
<b>Coastal sub-region</b>						
Cooma-Monaro	9 589	9 763	9 680	0.95	-0.85	3.79
Eurobodalla	21 519	27 121	30 447	41.49	12.26	11.92
Kiama	13 443	15 908	17 706	31.71	11.30	6.93
Queanbeyan	23 036	24 942	27 414	19.01	9.91	10.73
Shoalhaven	55 980	68 287	76 726	37.06	12.36	30.03
Tallaganda	2 385	2 464	2 420	1.47	-1.79	0.95
Yarrowlumla	6 035	7 990	9 186	52.21	14.97	3.60
<b>Coastal total</b>	<b>131 987</b>	<b>156 475</b>	<b>173 579</b>	<b>31.51</b>	<b>10.93</b>	<b>67.94</b>
<b>Western sub-region</b>						
Holbrook	2 580	2 612	2 529	-1.98	-3.18	0.99
Snowy River	8 876	17 039	17 697	99.38	3.86	6.93
Tumbarumba	3 893	3 686	3 613	-7.19	-1.98	1.41
Tumut	11 507	11 175	10 951	-4.83	-2.00	4.29
Yass	8 034	8 780	9 128	13.62	3.96	3.57
<b>West total</b>	<b>34 890</b>	<b>43 292</b>	<b>43 918</b>	<b>25.88</b>	<b>1.45</b>	<b>17.19</b>
<b>Total Southern area</b>	<b>203 448</b>	<b>237 247</b>	<b>255 484</b>	<b>25.58</b>	<b>7.69</b>	<b>100.00</b>

Source: ABS CDATA 1998 final release.

### 3.2 AGE PROFILE

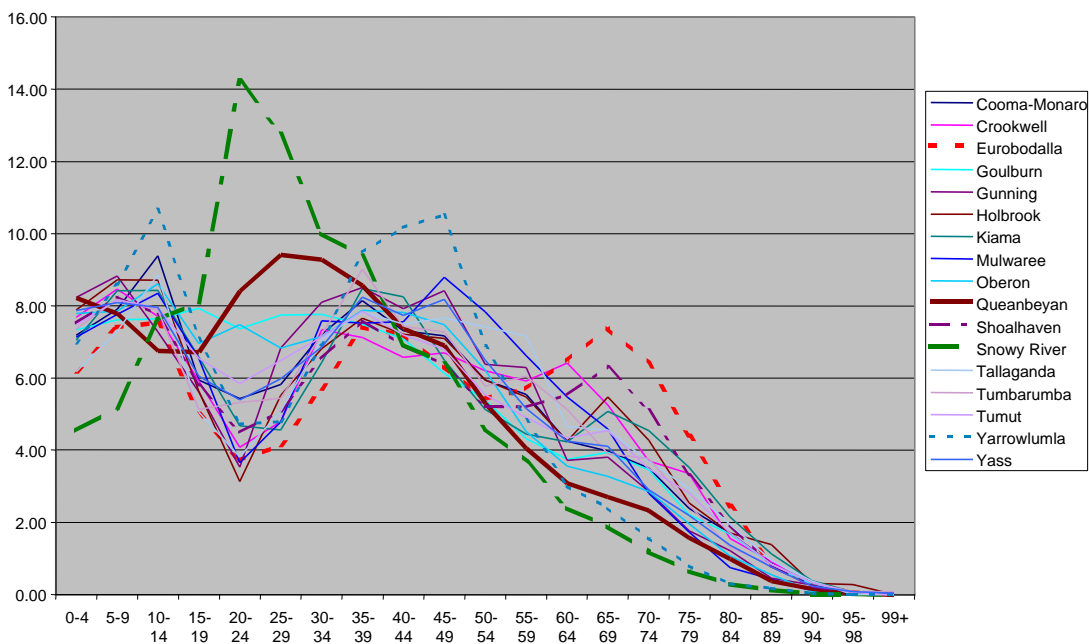
In 1996 the median age in the Southern region was 34, an increase from 1991 when the median age was 32. All sub-regions experienced an increase of one to two years in median age over this period, although Kiama LGA experienced the greatest increase in this period (33-37 years). The Eurobodalla LGA had the highest median age (42). The median age for NSW during the same period was 34.

In 1996 approximately 12% of the population was aged 65 years. The coastal sub-region, had the highest proportion of people aged over 65 years (16%), three per cent higher than that of NSW (13%). The Snowy River LGA had the lowest proportion of persons over 65 years of age (4%). Eurobodalla and the highest proportion of persons over 65 years of age (22%)

Twenty-three percent of the population was aged 15 years or less. Yarrawlumla LGA had the highest percentage of people aged 15 years and under (26%) while the Snowy River LGA had the lowest percentage of people in this age bracket (17.34%).

Overall the Southern region had a higher dependency ratio (35%) than that of NSW (34%). Eurobodalla LGA had the highest dependency ratio (43%). The Snowy River LGA had the lowest dependency ratio (22%).<sup>2</sup>

**FIGURE 3B: AGE PROFILE — PER CENT IN AGE GROUP 1996**



Source: ABS CDATA 1998 final release

<sup>2</sup> Dependency ratios: the proportion of persons in the community not earning an income from participating in the labour force including those aged 0 to 15 years and those aged 65 years and over compared to the total population.

**TABLE 3B: SELECTED DEMOGRAPHIC CHARACTERISTICS OF THE SOUTHERN REGION POPULATION**

LGA	Depend ratio	1996 median age	1991 median age	% <15 years	% >65 years
Northern sub-region					
Crookwell	38.96	37	35	23.86	15.11
Goulburn	35.04	32	31	22.58	12.47
Gunning	34.72	35	35	24.35	10.37
Mulwaree	33.60	37	35	23.25	10.35
Oberon	34.08	33	31	24.27	9.82
Northern total	35.13	33	32	23.13	12.01
Coastal sub-region					
Cooma-Monaro	37.25	35	32	24.47	12.78
Eurobodalla	42.90	42	39	21.12	21.78
Kiama	40.75	37	33	23.88	16.87
Queanbeyan	30.91	31	29	22.75	8.16
Shoalhaven	41.27	37	35	23.52	17.75
Tallaganda	36.77	39	36	22.32	14.45
Yarrowlumla	31.51	35	32	26.25	5.26
Coastal total	39.06	36	34	23.20	15.87
Western sub-region					
Holbrook	41.27	37	35	25.34	15.94
Snowy River	21.51	28	29	17.34	4.18
Tumbarumba	36.15	36	33	23.44	12.72
Tumut	37.35	35	33	23.57	13.79
Yass	35.61	36	33	23.94	11.68
West total	30.79	32	31	21.25	9.54
Total Southern area	34.99	34	33	23.00	37.42
New South Wales	33.92	34	32	21.40	12.70

Source: ABS 1996 Census of Population and Housing. Selected Social and Housing Characteristics for Statistical Local Areas. New South Wales and Jervis Bay. ABS Catalogue No. 2015.1 and ABS CData statistical package.

### 3.3 EMPLOYMENT AND INCOME

#### Labour Force

The Southern Region labour force increased by more than 26% over the 1986 to 1996 period. This approximated the population increase in the region during this period. The largest growth in the labour force occurred in the western sub-region (39%). This figure was strongly influenced by the extraordinary growth in the Snowy River LGA.

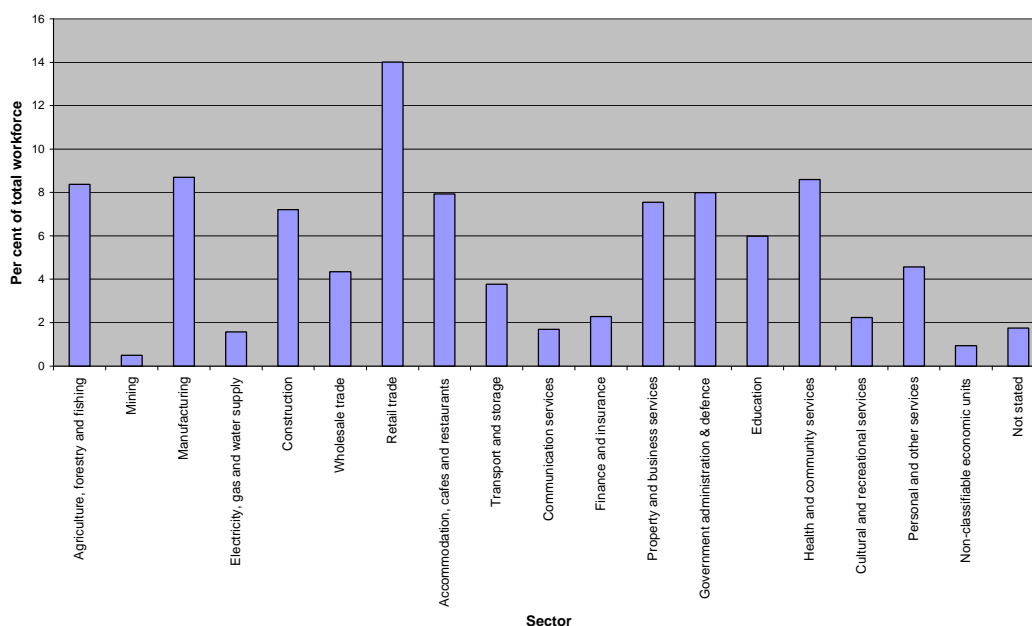
The coastal sub-region had an increase of 29% of persons in the labour force, with Kiama LGA having the largest increase in the sub-region (39%), possibly due to its increasing role as a dormitory/commuter suburb to Sydney. Cooma-Monaro LGA had a negative growth rate (-1%).

The Northern sub-region had a very low growth in its labour force in comparison with the other sub-regions (5%). However, Oberon LGA had an increase of 27% which may be at least partially attributed to the development of the softwood industry in this area.

**TABLE 3C: PERSONS IN THE LABOUR FORCE, 1986 TO 1996**

<b>LGA</b>	<b>1986</b>	<b>1991</b>	<b>1996</b>	<b>% change 1986-1996</b>
Northern				
Crookwell	1 989	2 070	1 918	-3.57
Goulburn	9 678	9 796	9 790	1.16
Gunning	1 033	1 103	1 118	8.23
Mulwaree	2 392	2 692	2 680	12.04
Oberon	1 787	1 933	2 263	26.64
Northern sub-region	16 879	17 594	17 769	5.27
Coastal				
Cooma-Monaro	4 513	4 664	4 465	-1.06
Eurobodalla	7 863	9 979	10 787	37.19
Kiama	5 505	6 892	7 674	39.40
Queanbeyan	12 310	13 284	14 265	15.88
Shoalhaven	21 415	26 383	28 633	33.71
Tallaganda	1 048	1 161	1 138	8.49
Yarrowlumla	3 107	4 326	4 926	58.55
Coastal sub-region	55 761	66 689	71 888	28.92
Western				
Holbrook	1 177	1 189	1 102	-6.37
Snowy River	5 416	11 155	11 592	114.03
Tumbarumba	1 709	1 672	1 628	-4.74
Tumut	5 011	4 962	4 951	-1.20
Yass	3 818	4 360	4 606	20.64
Western sub-region	17 131	23 338	23 879	39.39
Total Southern area	89 771	107 621	113 535	26.47

Source: ABS Cdata 1998 final release

**FIGURE 3C: PER CENT OF WORKFORCE EMPLOYED IN THE SOUTHERN REGION 1996**

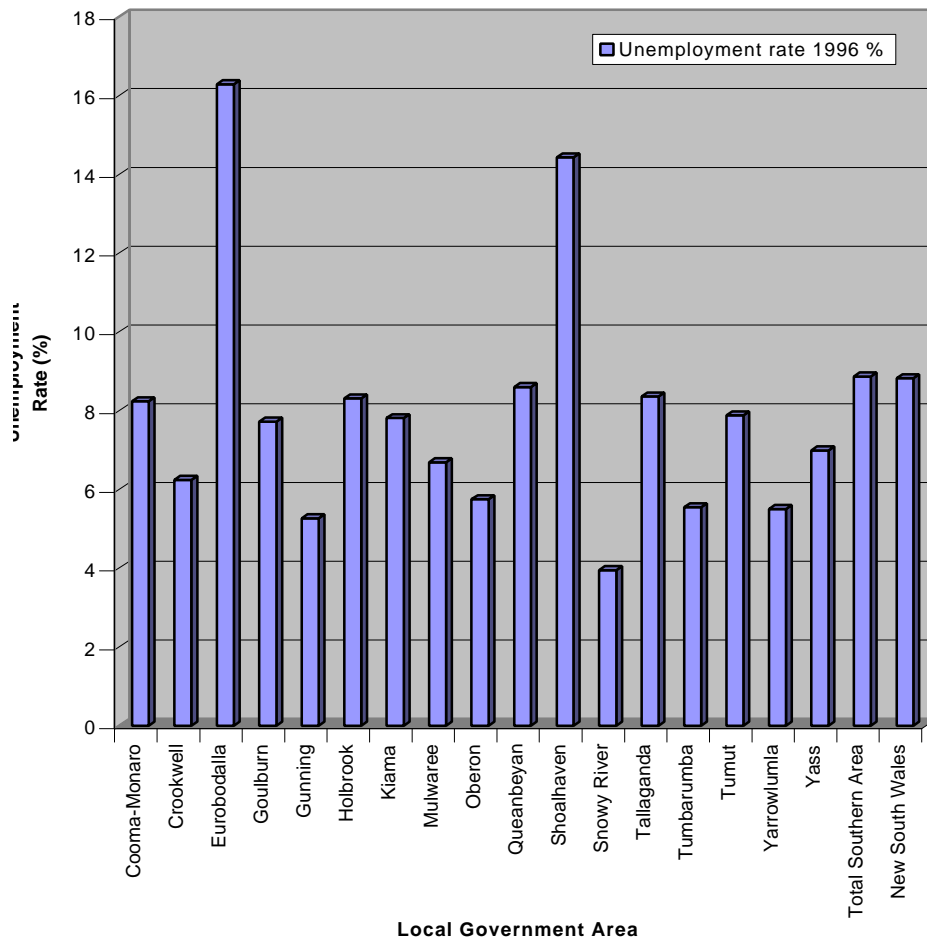
Source: ABS CDATA 1998 final release

## Unemployment

The 1996 census showed the Southern Region study area had an unemployment rate of 9% (12 015 persons), almost equal to the NSW rate for unemployment. This was a fall of 2% since 1991 (11%). This reflected the trend in NSW generally during this period towards a decline in unemployment levels. Unemployment ranged from 4% in Snowy River LGA to 16% in Eurobodalla LGA, however, the low unemployment rate in Snowy River LGA could have been influenced by the coincidence of the census with the availability of seasonal employment in the ski fields and surrounding areas.

The two largest coastal LGAs in the Southern Region, Shoalhaven and Eurobodalla recorded the highest unemployment rates (14% and 16%). These were significantly higher than the NSW unemployment rate (approximately 9%).

Five LGAs in the study area had workforce participation rates of more than 50%. Shoalhaven and Eurobodalla LGA had the lowest workforce participation rates (37% and 35%). Only Snowy River LGA (65%) had a higher participation rate than the NSW rate (59%).

**FIGURE 3D: UNEMPLOYMENT RATE, 1996 (PER CENT)**

## Income

In 1996 median weekly personal incomes for people in the Southern Region aged 15 years and over ranged from \$228 per week in Eurobodalla to \$506 per week in Yarrowlunla. The rate for the Southern Region was \$266 per week, and \$336 per week for the whole of NSW. Only three LGAs recorded median weekly personal incomes over \$400 per week. These included Queanbeyan, Snowy River and Yarrowlunla LGAs. The lowest median weekly personal incomes were recorded at Eurobodalla and Shoalhaven LGAs.

The median weekly household income in the Southern area in 1996 was \$561 per week. Median weekly household incomes in 1996 ranged from \$431 in Eurobodalla to \$983 in Yarrowlunla. Only three LGAs had median weekly household incomes above the NSW median of \$660 per week. These were Queanbeyan (\$683), Snowy River (\$813) and Yarrowlunla (\$983).

**TABLE 3D: LABOUR FORCE AND INCOME — SOUTHERN REGION LGAS, 1996**

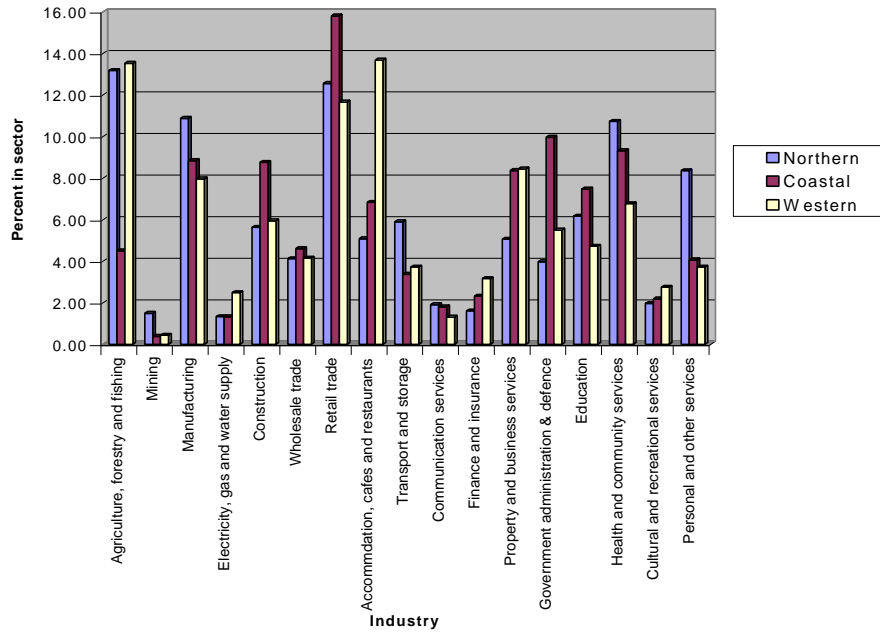
	Unemployment rate 1996 %	Persons unemployed 1996	Persons in the labour force 1996	Workforce participation rate 1996	Median weekly personal income 1996 (\$)	Median weekly household income 1996 (\$)
Cooma-Monaro	8.24	362	4 465	46.13	304	559
Crookwell	6.24	120	1 918	45.13	264	488
Eurobodalla	16.29	1 758	10 787	35.43	228	431
Goulburn	7.72	750	9 790	45.98	331	587
Gunning	5.27	68	1 118	50.57	320	604
Holbrook	8.31	93	1 102	43.57	246	467
Kiama	7.81	596	7 674	43.35	314	645
Mulwaree	6.69	175	2 680	47.64	303	603
Oberon	5.75	131	2 263	49.11	365	641
Queanbeyan	8.6	1 230	14 265	52.04	401	683
Shoalhaven	14.43	4 134	28 633	37.32	236	447
Snowy River	3.95	459	11 592	65.5	496	813
Tallaganda	8.36	89	1 137	46.98	264	462
Tumbarumba	5.55	93	1 628	45.06	286	523
Tumut	7.88	391	4 951	45.21	290	535
Yarrowlumla	5.5	270	4 771	54.85	506	983
Yass	6.99	320	4 606	50.46	351	653
Total Southern Area	8.87	11 039	113 380	57.06	266	561
New South Wales	8.82	247 669	2 806 544	46.48	336	660

Source: ABS 1996 Census of Population and Housing and IRDB 1996.

## Industries

In the Northern sub-region the major industry was agriculture, forestry and fishery (13%) reflecting the strong focus on softwood industries in the Oberon LGA and cattle and sheep grazing in the rural LGAs. In the Coastal sub-region the retail sector accounted for 16% of employment, government administration and defence sector accounted for 10%, and health and community services 9%. In the Western sub-region accommodation, cafes and restaurant sector accounted for 14% of the workforce and retailing 12% reflecting the emphasis in this area on tourism and skiing. Agriculture, forestry and fishing contributed approximately 14% to employment reflecting the prominence of the softwood industry in this sub-region.

**FIGURE 3E: PER CENT OF WORKFORCE EMPLOYED IN EACH SECTOR BY SUB-REGIONS 1996**



Agriculture, forestry and fishing contributed significantly to employment in the region with particularly high levels in Crookwell, Gunning, Holbrook, Mulwaree, Tallaganda, Tumbarumba, Tumut, and Yass LGAs. Retail trade also contributed significantly to employment especially in Cooma-Monaro, Eurobodalla, Goulburn and Shoalhaven LGAs.



The following table identifies the major industries in each LGA.

**TABLE 3E: EMPLOYMENT BY INDUSTRY – LGAS 1996**

LGA	Major Industries
Cooma-Monaro	Retail Trade 16.9%, Agriculture, Forestry and Fishing 10.7%, Health and Community Services 9.2%, Property and Business Services 9.0% and Accommodation, Cafes and Restaurants 6.7%.
Crookwell	Agriculture, Forestry and Fishing 39.9%, Retail Trade 9.2%, Health and Community Services 7.9%, Education 6.7% and Construction 5.0%.
Eurobodalla	Retail Trade 19.6%, Health and Community Services 11.5%, Accommodation, Cafes and Restaurants 10.7%, Construction 8.6% and Education 7.5%.
Goulburn	Retail Trade 15.6%, Health and Community Services 13.4%, Personal and Other Services 11.8%, Manufacturing 11.1% and Transport and Storage 7.1%.
Gunning	Agriculture, Forestry and Fishing 32.3%, Government Administration and Defence 10.5%, Property and Business Services 8.0%, Retail Trade 6.85% and Health and Community Services 6.7%.
Holbrook	Agriculture, Forestry and Fishing 36.0%, Retail Trade 11.9%, Health and Community Services 7.1%, Government Administration and Defence 6.7% and Transport and Storage 6.6%.
Kiama	Education 13.4%, Retail Trade 13.2%, Health and Community Services 10.8%, Construction 9.8% and Manufacturing 9.6%.
Mulwaree	Agriculture, Forestry and Fishing 22.0%, Retail Trade 10.9%, Health and Community Services 10.8%, Construction 9.8% and Education 6.6%.
Oberon	Manufacturing 22.7%, Agriculture, Forestry and Fishing 21.1%, Construction 10.1%, Retail Trade 7.3% and Accommodation, Cafes and Restaurants 6.2%.
Queanbeyan	Government Administration and Defence 17.2%, Retail Trade 13.6%, Property and Business Services 10.6%, Construction 8.9% and Manufacturing 8.4%.
Shoalhaven	Retail Trade 17.3%, Manufacturing 10.8%, Health and Community Services 10.0%, Construction 9.3% and Government Administration and Defence 8.9%.
Snowy River	Accommodation, Cafes and Restaurants 22.4%, Property and Business Services 11.6%, Retail trade 10.8%, Construction 6.9% and Health and Community Services 6.6%.
Tallanganda	Agriculture, Forestry and Fishing 30.3%, Retail Trade 10.0%, Government Administration and Defence 9.9%, Accommodation, Cafes and Restaurants 8.0% and Health and Community Services 6.9%.
Tumbarumba	Agriculture, Forestry and Fishing 33.4%, Manufacturing 11.4%, Retail Trade 9.2%, Electricity, Gas and Water Supply 6.9% and Education 6.6%.
Tumut	Agriculture, Forestry and Fishing 21.6%, Manufacturing 16.7%, Retail Trade 11.9%, Health and Community Services 6.7% and Education 6.6%.
Yarrowlumla	Government Administration and Defence 16.4%, Property and Business Services 11.4%, Retail Trade 11.1%, Education 9.1% and Construction 8.1%.
Yass	Agriculture, Forestry and Fishing 15.7%, Retail Trade 14.4%, Government Administration and Defence 10.6%, Property and Business Services 8.4% and Health and Community Services 7.9%.

## Timber Industry Employment

In this analysis, the 1996 Australian New Zealand Standard Industry Classification (ANZSIC) and the 1991 Australian Standard Industry Codes (ASIC) (shown in the table below) were used to define employment in sawmilling and timber harvesting. ANZSIC codes 2321 and 2322 and ASIC code 2533 were those used to define employment in the timber industry. These codes are indicative of the primary and first stages of wood processing. The decision to define the timber industry using these codes was supported by the work of Dargavel et al (1999) who considered inclusion of the first stage of processing to be indicative of employment in the forest sector.

**NB: ABS census figures do not differentiate between hardwood and softwood figures, nor state agency or private personnel. It should be noted that most of the LGAs and sub-regions are softwood dominated.**

**TABLE 3F: INDUSTRY CATEGORIES INCLUDED IN THE LABOURFORCE ANALYSIS**

ABS ANZSIC	1996	ABS ASIC	1991
0300	Forestry & Logging, Undefined	0300	Forestry & Logging, undefined
0301	Forestry	0303	Logging
0302	Logging	0304	Forestry & Services to forestry
0303	Services to forestry	2531	Log sawmilling
2310	Log sawmilling & timber dressing, undefined	2532	Resawn & dressed timber
2311	Log sawmilling	2537	Hardwood chips
2312	Wood chipping		
2313	Timber resawing & dressing		
2321	Plywood & veneer manufacturing	2533	Veneers and manufactured boards of wood
2322	Fabricated wood manufacturing		

Sawmilling and log harvesting employed 1 250 persons in the Southern region in 1996. This included persons employed in forestry, logging, services to logging, log sawmilling, woodchipping, and timber resawing and dressing. The majority of this employment was in the Western sub-region – a reflection of the high reliance of that area on softwood industries. The largest employment change in this sector between 1991 and 1996 was experienced in the Western sub-region where employment in sawmilling and log harvesting increased by 35%.

**TABLE 3G: PERSONS EMPLOYED IN THE HARVESTING AND MILLING OF TIMBER, 1991 AND 1996**

Sub-region	1991	1996	Change 1991–1996
Northern sub-region	170	210	23.53%
Coastal sub-region	318	284	-10.69%
Western sub-region	558	756	35.48%
Southern Region Total	1 046	1 250	19.50%

Source : ABS customised tables from 1991 & 1996 Census of Population and Housing

The harvesting and milling sector of the timber industry employed 1 250 persons in the Southern Region in 1996, an increase of 204 positions in the 1991-1996 period. As a proportion of the total Southern region workforce there was a decline of only 0.2%.

Employment in the harvesting and milling of timber varied considerably over the region with the highest levels of employment occurring in Tumut, Oberon, Tumbarumba, and Eurobodalla. Except for the Eurobodalla LGA, these high employment levels can largely be attributed to employment in the softwood industry, although reasonable proportion of employment in the timber industry in Tumbarumba LGA and Tumut is hardwood related.

The following table identifies employment in the timber industry for each LGA for both 1991 and 1996, the percentage of change in employment levels during this period, and the percentage of change in relation to the region.

**TABLE 3H: EMPLOYMENT IN THE TIMBER INDUSTRY**

LGA	1991	1996	Change	% change in relation to region
Northern				
Crookwell	0	0	0	0.00
Goulburn	9	9	0	0.00
Gunning	0	3	3	0.42
Mulwaree	3	7	4	0.56
Oberon	229	460	231	32.31
Total Northern	241	479	238	33.29
Coastal				
Cooma-Monaro	27	31	4	0.56
Eurobodalla	117	123	6	0.84
Kiama	10	3	-7	-0.98
Queanbeyan	45	51	6	0.84
Shoalhaven	88	128	40	5.59
Tallaganda	17	25	8	1.12
Yarrowlumla	16	16	0	0.00
Total Coastal	320	377	57	7.97
Western				
Holbrook	18	15	-3	-0.42
Snowy River	4	7	3	0.42
Tumbarumba	130	230	100	13.99
Tumut	485	810	325	45.45
Yass	8	3	-5	-0.70
Total Western	645	1 065	420	58.74
Total Southern area	1 206	1 921	715	100.00

Source: ABS 1996 and 1991 Census of Population and Housing — customised information.

### 3.4 HEALTH

A wide range of health services are available within the Southern region. Generally the larger facilities are located in major population centres. The following table identifies the health services located within each LGA.

**TABLE 3I: HEALTH SERVICES**

<b>LGA</b>	<b>Health services</b>	<b>Aged care services</b>	<b>Child health services</b>
Cooma-Monaro	Cooma Hospital, 40 beds	1 Nursing Home	1 Early Childhood Clinic
Crookwell	Crookwell Hospital, 27 beds	3 Nursing Homes	Crookwell District Hospital
Eurobodalla	Batemans Bay Hospital, 37 beds Moruya Hospital, 60 Beds	1 Respite Care Service 2 Community Health Centres 1 Home Nursing Service 3 Retirement Villages	4 Early Childhood Clinics 1 Special Needs Group 1 Child Dental Service 1 Mobile School Dental Service
Goulburn	Goulburn Hospital, 86 beds	5 Aged Care facilities St. Johns Hospital	1 Community Health Centre
Gunning	District Health Service	4 homes sponsored by Lions Club	1 District Health Service
Holbrook	Holbrook Hospital, 12 beds	Hospital, 16 Beds Hostel, 21 Beds	Hospital Child Health Services
Kiama	Kiama Hospital, limited in-patient services	2 Nursing homes 2 Retirement Villages 1 Hostel	Immunisation Clinic School Dental Service
Mulwaree	Nil	Nil	Nil
Oberon	Oberon Hospital, 8 beds	Health Service, 8 beds Council self care Units	
Queanbeyan	Queanbeyan Hospital, 71 beds	1 Nursing home	2 Health Centres 1 School Dental Service
Shoalhaven	1 Community Health Centre, Ulladulla Milton Hospital, 20 beds Nowra Hospital, 94 beds	2 Masonic Aged Persons Lodges 2 Nursing Homes 6 Retirement Villages	5 Early Childhood Centres 1 Dental clinic
Snowy River	Nil	1 Hostel	1 Community Health Centre
Tallaganda	Braidwood Multipurpose Service, 6 Beds	Multipurpose Hostel, 10 beds	Multipurpose Service includes: Baby Health, Clinic and Dental Services
Tumbarumba	Tumbarumba Multipurpose Service, 10 beds	Multipurpose Service Nursing Home, 10 beds Hostel, 16 beds	Multipurpose Service includes Community Health, Early Childhood Services and School Dental
Tumut	Tumut Hospital, 26 Beds	1 Lodge	Early Childhood Centre (Mobile Service)
Yarrowlumla	Nil	Nil	Assistance from Canberra Health Service
Yass	Yass Hospital, 26 Beds	4 Homes	Yass Hospital

There have been some developments in regional health services in the Southern Region study area during the 1997–98 financial year. These are:

- Completion and use of the Chisholm Ross Centre — an acute short-stay psychiatric assessment unit co-located in the grounds of Goulburn Base Hospital;
- Development of Project Definition Plans for Multi-Purpose Health Services in Oberon;
- Completion of major service reviews to guide the long-term development of service options and planning of resources in aged care, youth health, women's

health, pathology services, medical imaging services, mental health and Aboriginal health in the Greater Murray Health Area;

- Commencement of the Greater Murray Accessline — a 1800 telephone triage, referral and information service which provides better access to services and helps support local health professionals in their patient care;
- Addition of a new \$8.4 million wing of the Shoalhaven District Memorial Hospital (Nowra) to allow improved medial, surgical and rehabilitation services for people living in the Shoalhaven;
- Improved access to comprehensive community health services following the opening of the \$2.8 million Nowra Community Health Centre;
- Re-opening of in-patient services at Kiama Hospital after refurbishment.
- Planning for Stage 2B of Shoalhaven District Memorial Hospital;(Nowra) and
- Allocation of \$162 000 to allow the Shoalhaven Body Image and Eating Behaviour Service to continue.
- Establishment of Independent Pathology Business Units across the Southern Health Service Area;
- Establishment of Prevention of Abuse and Neglect of Children services across the Southern Health Service Area;
- Commencement of 1800 centralised intake phone number for Mental Health Services in the Southern Health Service Area (available 24 hours a day, seven days a week);

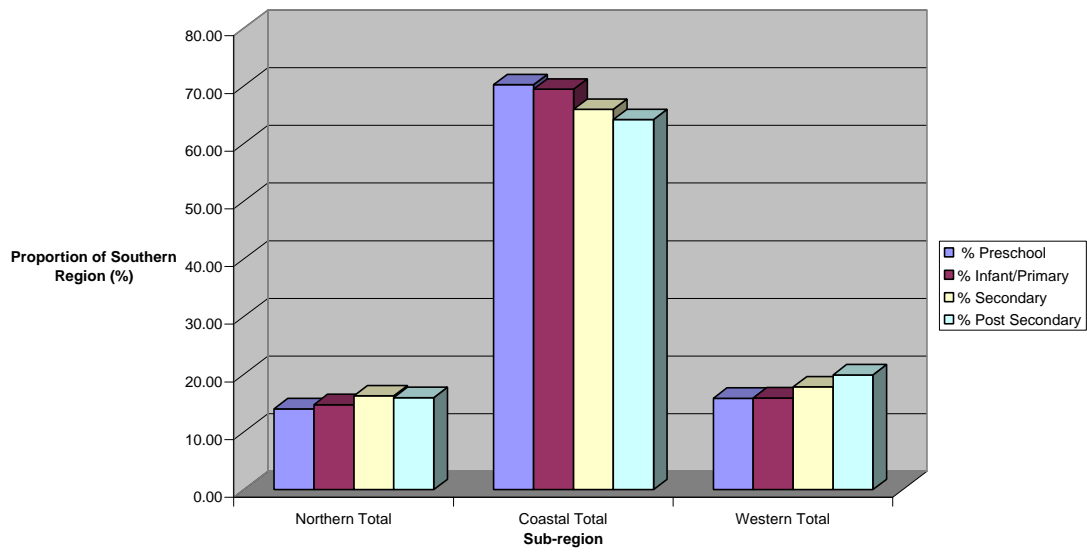
[Southern Health Service Annual Report 1997–98]

### **3.4 EDUCATION**

The 1996 census figures below show the Shoalhaven LGA has the highest proportion of persons attending educational institutions at all levels. Bega Valley and Eurobodalla LGAs also have relatively high proportions of persons attending educational institutions at all levels. The Queanbeyan and Snowy River LGAs both show high proportions of persons attending universities and places of advanced learning. Goulburn and Shoalhaven have large proportions attending other educational institutions (which include evening classes and special interest classes).

In all LGAs the proportion of people attending educational institutions was lower than the proportion not attending. The Coastal sub-region had the largest proportion attending educational institutions at all levels, however, the Western sub-region had a higher percentage of people attending post secondary education than other regions.

**FIGURE 3F: PROPORTION OF PERSONS ATTENDING EDUCATIONAL INSTITUTIONS IN SOUTHERN REGION SUB-REGIONS**



**TABLE 3J: EDUCATION — SOUTHERN REGION (GOVERNMENT AND NON-GOVERNMENT EDUCATION SECTORS)**

LGA	Persons in pre-school	% Pre-school	Persons in infant / primary school	% Infant/ primary	Persons in secondary school	% Secondary	Persons in TAFE Coll	% TAFE	Persons in CAE / univ	% CAE/ uni	Persons in other educ instit	% Other educ instit	Total persons in post secondary	% Post secondary	Not attending	Not stated	O/S visitor
Northern sub-region																	
Crookwell	69	1.58	481	1.77	300	1.64	66	1.03	32	0.84	14	1.38	112.00	1.00	3142	146	8
Goulburn	329	7.52	2157	7.93	1726	9.42	602	9.37	310	8.18	257	25.40	1169.00	10.41	14413	1459	43
Gunning	49	1.12	257	0.94	166	0.91	42	0.65	49	1.29	11	1.09	102.00	0.91	1580	56	0
Oberon	68	1.55	512	1.88	345	1.88	82	1.28	75	1.98	16	1.58	173.00	1.54	3196	292	26
Mulwaree	98	2.24	596	2.19	444	2.42	152	2.37	65	1.71	17	1.68	234.00	2.08	4008	222	21
Northern Total	613	14.01	4003	14.718	2981	16.271834	944	14.70	531	14	315	31.13	1790.00	15.95	26339	2175	98
Coastal sub-region																	
Cooma-Monaro	154	3.52	1202	4.42	622	3.40	323	5.03	158	4.17	39	3.85	520.00	4.63	6549	536	90
Eurobodalla	442	10.10	2995	11.01	2009	10.97	468	7.29	189	4.99	66	6.52	723.00	6.44	22692	1476	108
Kiama	374	8.54	2100	7.72	1354	7.39	530	8.25	373	9.84	55	5.43	958.00	8.53	12 304	563	53
Queanbeyan	356	8.13	2682	9.86	1801	9.83	808	12.58	621	16.38	101	9.98	1530.00	13.63	19703	1271	68
Shoalhaven	1562	35.69	8405	30.90	5296	28.91	1915	29.82	705	18.60	229	22.63	2849.00	25.38	55018	3355	244
Tallaganda	44	1.01	260	0.96	173	0.94	26	0.40	25	0.66	6	0.59	57.00	0.51	1769	115	6
Yarrowlumla	140	3.20	1232	4.53	820	4.48	229	3.57	293	7.73	44	4.35	566.00	5.04	6052	322	50
Coastal Total	3072	70.19	18876	69.40	12075	65.91	4299	66.94	2364	62.4	540	53.36	7203.00	64.17	111783	7638	619
Western sub-region																	
Holbrook	49	1.12	319	1.17	181	0.99	34	0.53	19	0.50	14	1.38	67.00	0.60	1793	113	8
Snowy River	222	5.07	1363	5.01	1422	7.76	531	8.27	547	14.43	90	8.89	1168.00	10.41	12223	1021	280
Tumbarumba	57	1.30	406	1.49	220	1.20	61	0.95	40	1.06	6	0.59	107.00	0.95	2533	280	12
Tumut	171	3.91	1213	4.46	761	4.15	335	5.22	104	2.74	20	1.98	459.00	4.09	7877	460	9
Yass	193	4.41	1018	3.74	680	3.71	218	3.39	186	4.91	27	2.67	431.00	3.84	6546	243	16
Western Total	692	15.81	4319	15.8798	3264	17.816594	1179	18.36	896	23.6	157	15.51	2232.00	19.88	30972	2117	325
Total Southern area	4377	100	27198	100	18320	100	6422	100	3791	100	1012	100	11225.00	100.00	169094	11930	1042
% of NSW		4.65		4.74		4.31		3.71		1.91		2.72		#DIV/0!			
New South Wales	94138		574172		425301		172905		198710		37153						

### 3.5 HOUSING

In 1996, most Southern Region LGAs showed home ownership was the dominant form of housing tenure. Home ownership rates ranged from 27% in Queanbeyan LGA to 49% in Crookwell LGA. In the Southern Region, home ownership levels were 3% less than in NSW (39%).

The highest proportion of dwellings being purchased or rented was in Queanbeyan LGA (59%), which, together with Snowy River, Goulburn, Cooma-Monaro, Oberon, Tumut, Yarrowlumla and Yass LGAs recorded a higher proportion of dwellings being purchased or rented than owned. All these LGAs are inland NSW.

The proportion of unoccupied dwellings in the study area at the 1996 census (23%) was almost three times higher than that found in NSW (9%). The number of unoccupied dwellings in the Southern Region varied by up to 23%, ranging from 9% of dwellings in Goulburn LGA to 32% of dwellings in Eurobodalla LGA. This may have been influenced by the large number of 'holiday homes' in Eurobodalla. Snowy River LGA had the third highest proportion of unoccupied dwellings — possibly indicating a late ski season or an oversupply of tourist accommodation. Goulburn was the only LGA with a lower proportion (8.79%) of unoccupied dwellings lower than NSW (8.92%) in the same period.

Median weekly rental rates ranged between \$50 per week in Crookwell LGA and \$178 per week in Snowy River LGA. The median weekly rent for the Southern Region was \$85 per week compared to the NSW figure of \$142 per week.

The median monthly loan repayment for the Southern Region in 1996 was \$906 per month. Median monthly loan repayments ranged from \$542 per month in Tumbarumba LGA to \$1371 per month in Yarrowlumla LGA. All but one LGA had a median monthly loan repayment lower than that for NSW in 1996 (\$906).



**TABLE 3K: HOUSING CHARACTERISTICS — SOUTHERN REGION 1996**

	Fully owned	% of total occupied housing	Being bought	Rented (incl rent free)	% of total occupied housing	Other	Unoccup dwellings	Total dwellings	% unocc	Non-private dwellings	Median weekly rent	Median monthly loan repayment	Residential dwelling approvals (1997)
Cooma-Monaro	1 576	37.22	799	990	42.25	210	659	4234	15.56	28	100	650	37
Cwell	969	48.52	224	325	27.49	69	410	1997	20.53	7	50	650	13
Eurobodalla	6 348	34.99	2007	3283	29.16	632	5873	18143	32.37	62	110	656	342
Goulburn	2 973	36.01	1821	2440	51.62	295	726	8255	8.79	47	110	737	64
Gunning	409	40.62	227	158	38.23	36	177	1007	17.58	0	60	802	16
Holbrook	497	45.18	172	230	36.55	51	150	1100	13.64	8	65	563	9
Kiama	3 261	42.69	1531	1158	35.21	68	1270	7638	16.63	19	150	867	135
Mulwaree	1 103	37.15	490	386	29.50	103	887	2969	29.88	7	70	808	82
Oberon	673	34.69	349	500	43.76	79	339	1940	17.47	12	100	800	40
Queanbeyan	3 227	27.34	3009	3909	58.61	490	1169	11804	9.90	28	110	867	168
Shoalhaven	14 986	35.95	6006	7468	32.32	1268	11961	41689	28.69	88	110	715	833
Snowy River	906	22.34	387	1260	40.61	300	1203	4056	29.66	332	178	867	95
Tallaganda	541	38.86	185	227	29.60	52	387	1392	27.80	7	85	614	25
Tumbarumba	698	43.11	232	342	35.45	65	282	1619	17.42	16	75	542	7
Tumut	1 956	40.20	797	1234	41.74	169	710	4866	14.59	23	89	650	48
Yarrowlumla	1 285	37.16	1183	468	47.74	145	377	3458	10.90	9	124	1371	76
Yass	1 500	38.57	914	795	43.94	119	561	3889	14.43	18	100	844	55
Southern Region	42 908	35.84	20333	25173	38.01	4151	27141	119706	22.67	692	85	674	2045
NSW	924 081	38.70	489538	651068	47.77	110230	212908	2387825	8.92	6384	142	906	

Source : ABS Census of Population and Housing 1996 : Selected social and housing characteristics for Statistical Local Areas - New South Wales and Jervis Bay