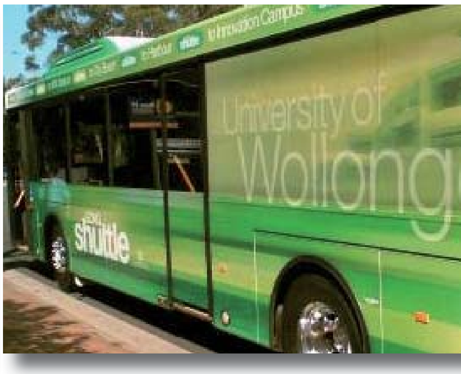
IRIS RESEARCH

Insight for Business & Government

MARCH 2011

PROFILE ILLAWARRA



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NSW GOVERNMENT Industry & Investment

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Highlights

- Accommodation revenue from tourist establishments throughout the Illawarra improved by 8.5% in the year to December 2010, to $81.4 Million.

- The number of nights that international overnight visitors spent in the Wollongong Statistical District (WSD) was up 10.1% on the year to December 2009 to 1.6 Million nights, while there was a 5.7% increase in the number of domestic overnight visitor nights to 2.4 Million nights.

- The volume of jobs advertised in the Saturday edition of the Illawarra Mercury fell 4.3% during the twelve months to December. However, there was a quarterly improvement of 10.6% to 1,504 job ads.

- The average number of employed persons reached 187,600 for the twelve months to December 2010, which is up 4.8% compared to the year to December 2009. At the same time, the average unemployment rate for the Illawarra SD improved by 0.4% pts to 6.7%.

- Results from the March 2011 *Illawarra Business Survey* indicate that local businesses experienced a slow start to 2011, with a net 5.6% of businesses reporting better trading conditions.

- The level of trade activity at Port Kembla Harbour increased over the December quarter. Imports grew by 5.0% and there was a 9.9% rise in export tonnage.

- Consumer confidence in the Illawarra continued to be fairly stable over the March 2011 quarter. The *Illawarra Consumer Sentiment Index* increased slightly to 86 pts and the relative financial position of Illawarra households was steady at 99 pts.

- Stable prices and a decline in sales characterised the WSD property market during the December quarter. The median house price fell 0.4% to $423,500, while the volume of sales deteriorated 10.6%. Medium density property sales were down 18.3%, while the median price rose 3.3% to $340,000. The median land lot price increased 4.8% to $272,500, with 78 sales.

- The median weekly advertised cost to rent a house grew 8.6% during the year to December, to $380 per week. At the same time, the median price for units increased to $300, up 7.1%.

- The number of dwelling approvals in the ISD strengthened by 34.5% to 1,962 over the year to December, comprising a 140.9% upsurge in medium density approvals and a 2.5% rise in house approvals.

Trade

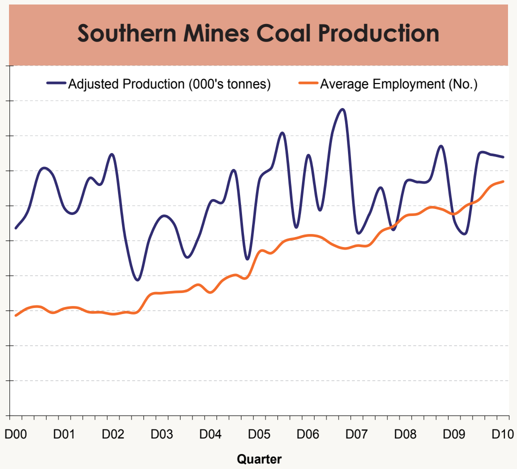
Southern Mines Coal Production

The production of coal and employment at mines improved in the twelve months to December 2010:

- Adjusted production rose 3.2% to 13.8 Million tonnes, up from 13.3 Million tonnes.
- At the same time, average employment climbed to 3,180 persons (up 8.8%), while productivity per employee deteriorated to 4.3 Thousand tonnes per person, down 5.1%.

Quarterly figures showed a mild downturn in coal production:

- There was a 0.9% weakening in adjusted production during the December quarter, to 3.7 Million tonnes.
- Productivity decreased by 2.9% to 1.1 Thousand tonnes per person as average employment grew to 3,347 employees (up 2.0%).



Source: Coal Services

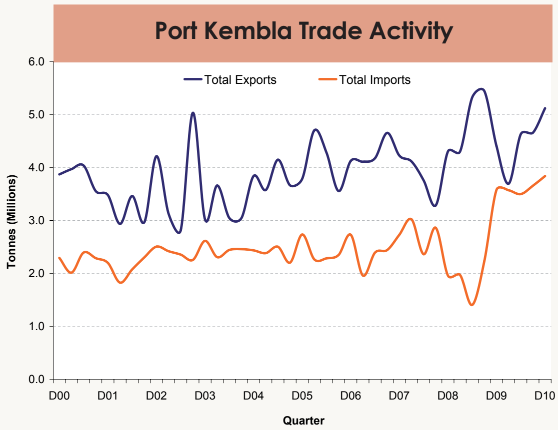
Port Kembla Trade

The total volume of trade through Port Kembla strengthened over the twelve months to December:

- Import levels increased to 14.6 Million tonnes, up 58.5% on the 9.2 Million tonnes reported for the previous year. This improvement can be attributed to growth in overseas and interstate imports, while intrastate imports declined.
- Export tonnage declined 7.1% to 18.1 Million tonnes, driven by a 9.5% fall in total overseas exports.

The level of trade activity increased over the December quarter:

- There was a 9.9% rise in export tonnage, up to 5.1 Million tonnes.
- Imports grew to 3.8 Million tonnes, a gain of 5.0%. This was influenced by an 8.0% increase in overseas imports to 1.9 Million tonnes and a 2.2% increase in interstate imports to 1.9 Million tonnes.



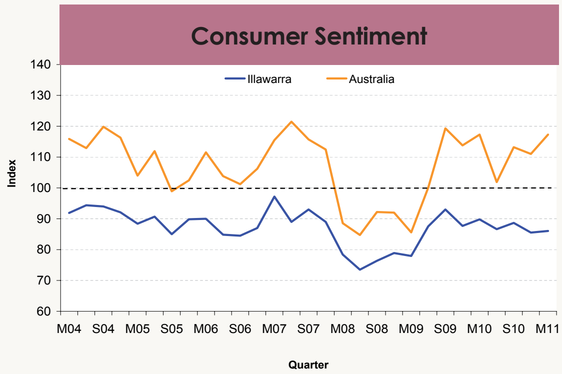
Source: Port Kembla Port Corporation

Consumer Sentiment & Business Conditions

Consumer Sentiment

Consumer confidence in the Illawarra continued to be fairly stable over the March 2011 quarter, while sentiment strengthened nation-wide:

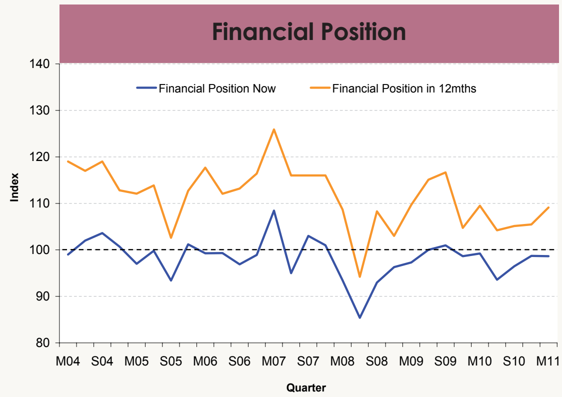
- The *Illawarra Consumer Sentiment Index* increased slightly to 86 pts overall, up by 1 pt. This sits just below the long term March quarter average of 89 pts.
- Westpac's *Australian Consumer Sentiment Index*, meanwhile, recorded a 6 pt gain on the December quarter result of 111 pts to 117 pts this quarter. This is well above the long term March quarter average of 107 pts.



Financial Position

Similarly, the *Current Financial Position Index* remained unchanged during the three months to March 2011:

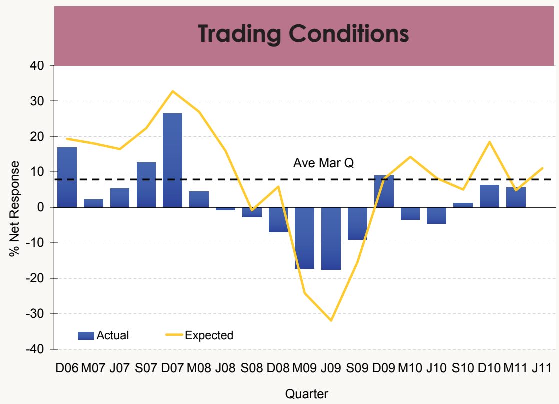
- The relative financial position of Illawarra households was steady at 99 pts.
- This is equal to the long term March quarter average.
- The *Future Financial Position Index* reached 109 pts, up 4 pts from December, signalling improved confidence about the future financial situation of local households.
- The average level of the *Future Financial Position Index* during a March quarter is 114 pts.



Trading Conditions

Results from the March 2011 *Illawarra Business Survey* indicate that businesses experienced a slow start to 2011:

- The *Trading Conditions Index* receded over the three months to March.
- Better trading conditions reported by a net 5.6% of businesses, a dip of 0.7% pts since the December quarter. This is 2.9% pts below the long term March quarter average of net 8.5%..
- Encouragingly, a net 11.0% of Illawarra businesses anticipate trade activity to pick up during the upcoming June 2011 quarter.



Labour Market

Labour Market Statistics

The Illawarra employment situation has enhanced during the year to December 2010:

- The average yearly unemployment rate for the Illawarra Statistical District improved by 0.4% pts to 6.7%, while youth unemployment declined to an average of 13.9% for the year, which equates to a 0.6% pt fall.
- The average number of persons employed reached 187,600, which is up 4.8% compared to the year to December 2009.
- The average participation rate improved to 56.4%, up 0.9% pts from 55.4%.
- An average of 7,154 people received unemployment benefits each month for the 2010 calendar year, down 16.2%.

The quarterly results are strong despite a decline since September:

- Average quarterly employment slipped 0.1% to 190,600 persons, which represents a loss of 100 jobs, while the average labour force participation rate remained at 57.0%.
- The unemployment rate increased to 6.9%, up 0.3% pts, however the average number of unemployment benefit recipients declined 7.0% to 6,301, down from 6,778.

	Yr to D09 (Ave.)	Yr to D10 (Ave.)
ISD Labour Market Statistics		
Employment (000's)	179.0	187.6
Unemployment Rate (%)	7.1	6.7
Participation Rate (%)	55.4	56.4
Youth Unemployment Rate (%)	14.6	13.9
Unemp. Benefit Recipients (No.)	8533	7154

Source: ABS Labour Force Survey

Job Advertisements

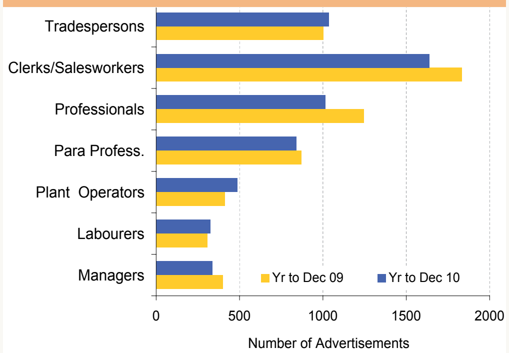
The volume of local job advertisements published in the Saturday edition of the Illawarra Mercury increased during the December quarter:

- The volume of job advertisements improved 10.6% to 1,504. There was a 43.8% rise in full time positions to 650 while, ads for part time positions weakened 6.3% to 825.

The year to December 2010 has seen an increase in demand for physical workers:

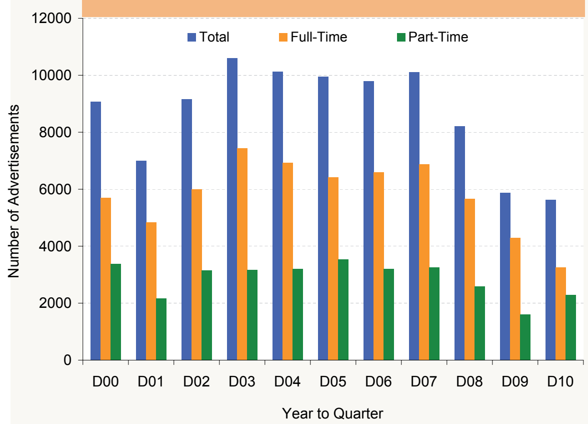
- The quantity of advertised positions for plant operators strengthened (up 18.2% to 486), ads for labourers were up 5.9% to 324 and job advertisements for tradespersons were up 3.3% to 1,036.
- Meanwhile, advertisements for professionals fell 18.5% to 1,015, ads for managers fell 15.8% to 336, ads for clerks/salesworkers fell 10.5% to 1,640 and ads for para professionals fell 3.4% to 840.
- Overall, the volume of jobs advertised fell 4.3% to 5,628, consisting of a 24.0% decrease in full time positions to 3,262 and a 42.8% surge in the number of part time positions to 2,298.

Job Ads By Occupational Category



Source: IRIS Job Advertisement Series

Volume of Job Advertisements



Source: IRIS /Illawarra Mercury Job Advertisements Series

Property Market (WSD)

Median property prices strengthened across the Wollongong Statistical District during the year to December 2010:

- The median house price rose 10.3% to $430,000, while the volume of sales decreased 15.5% to 3,229.
- Medium density property sales were down 25.2% to 1,480, while the median price for units climbed 6.3% to $336,000.
- Land lots recorded a median price of $255,000, up 9.4%. Land lot sales volumes were on par with the previous twelve months with 458 sales.

Stable prices and a decline in sales characterised the December quarter:

- The WSD's median house price fell 0.4% to $423,500, while the volume of sales deteriorated 10.6% to 716. At the same time there were 300 medium density property sales (down 18.3%), with the median price reaching $340,000 (up 3.3%). The median land lot price was up 4.8% to $272,500, with 78 sales, down from 140 in the September quarter.
- In Wollongong LGA the median price for houses rose slightly to $442,250 (up 1.6%), the median unit price grew 3.0% to $345,000, while the median land lot price surged 18.8% to $285,000.
- The median house price for Shellharbour LGA remained steady at $367,000 (up 0.5%), the median unit price increased by 3.4% to $300,000 and the median price for land dropped 4.3% to $263,250.
- Kiama's median house price weakened to $520,000, a decline of 8.3%. In contrast, the median unit price strengthened by 14.8% to $404,650 and the median land price soared to $352,000 (up 23.5%).

MEDIAN PROPERTY VALUES	Year to Dec 09 ($)	Year to Dec 10 ($)	Yearly Change (%)
HOUSES			
Wollongong Statistical District	390,000	430,000	*10.3*
Wollongong LGA	390,000	440,000	*12.8*
Shellharbour LGA	355,000	369,000	*3.9*
Kiama LGA	498,250	565,000	*13.4*
UNITS/TOWNHOUSES			
Wollongong Statistical District	316,000	336,000	*6.3*
Wollongong LGA	322,500	341,500	*5.9*
Shellharbour LGA	280,000	298,000	*6.4*
Kiama LGA	370,000	360,000	*-2.7*
LAND			
Wollongong Statistical District	233,000	255,000	*9.4*
Wollongong LGA	254,000	265,000	*4.3*
Shellharbour LGA	220,000	245,000	*11.4*
Kiama LGA	249,500	289,500	*16.0*

Source: IRIS/Valuer General's Land and Housing Database

Rental Market

The median weekly advertised cost to rent a property increased during the twelve months to December:

- The median rental price for houses grew 8.6% to $380 per week and the median price for units increased to $300 per week, up 7.1%.
- The average number of rental houses listed each week dropped 38.1% to 26 ads, while the average number of units advertised for rent declined 29.1% to 56 per week.

Quarterly results revealed that the median price for units eased:

- The median rental price for units decreased 6.7% to $280 per week, while average weekly unit listings fell to 44 (down 24.1%).
- The median asking price for houses grew to $380 per week (up 2.7%). The number of rental house listings deteriorated to 17 per week, a downturn of 41.4%.

RENTAL MARKET VALUES	Year to Dec 09 ($)	Year to Dec 10 ($)	Yearly Change (%)
HOUSES			
Median Weekly Rental ($)	350	380	*8.6*
Av. No. of Weekly Listings	42	26	*-38.1*
UNITS - 1 Bedroom			
Median Weekly Rental ($)	170	185	*8.8*
Av. No. of Weekly Listings	13	9	*-30.8*
UNITS - 2 Bedroom			
Median Weekly Rental ($)	260	295	*13.5*
Av. No. of Weekly Listings	41	30	*-26.8*
UNITS - Total			
Median Weekly Rental ($)	280	300	*7.1*
Av. No. of Weekly Listings	79	56	*-29.1*

Source: Derived from the 'To Let' Section of Saturday Edition of the Illawarra Mercury

Building Approvals

Dwelling Approvals

The number of residential building approvals in the Illawarra Statistical District (ISD) strengthened over the twelve months to December:

- Dwelling approvals rose 34.5% to 1,962, comprising a 140.9% upsurge in medium density approvals to 812 and a 2.5% rise in house approvals to 1,150.
- The number of dwelling approvals increased by 45.7% in Wollongong LGA to 625, by 14.9% in Shellharbour LGA to 301, by 17.1% in Kiama LGA to 41, by 44.2% in Shoalhaven LGA to 806 approvals and Wingecarribee recorded an 8.6% increase to 189 approvals.

In quarterly terms there were mixed results for dwelling approvals across the ISD:

- The total number of dwelling approvals improved 5.1% to 491. House approvals grew 10.9% to 285, while unit approvals fell 1.9% to 206.
- In the WSD, unit approvals reduced by more than half to 33 and house approvals recorded an 11.0% upturn to 121 approvals.
- Declines were recorded for Wollongong LGA (down 8.4% to 98), Shellharbour LGA (down 36.2% to 44) and Wingecarribee LGA (down 65.1% to 29).
- Meantime, residential approvals in Shoalhaven LGA grew 56.3% to 308 and Kiama LGA encountered 9.1% increase to 12 approvals.

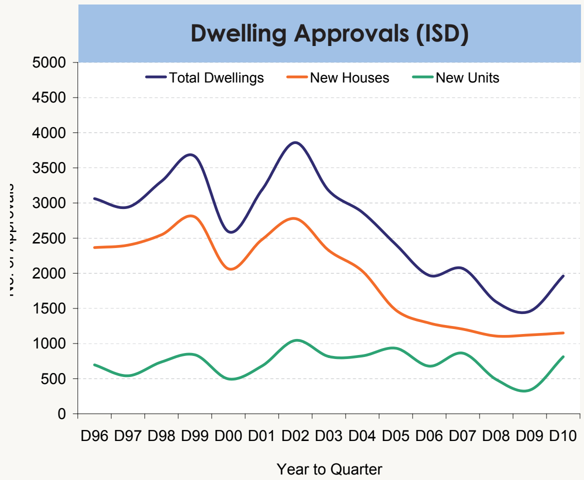
Non-Residential Building Approvals

The total value of non-residential construction approvals declined in the Illawarra region during the year to December 2010:

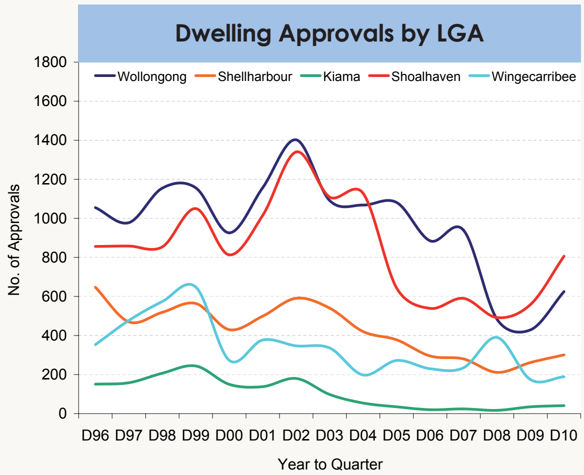
- The value of non-residential building approvals in the ISD dropped 50.1% to $265.5 Million.
- Private investment decreased by 29.2% to $159.4 Million, while public approvals fell to $106.1 Million (down 65.4%).
- NSW recorded $5.2 Billion worth of approvals, a decline of 49.4%.

The value of commercial construction approvals also decreased during the three months to December:

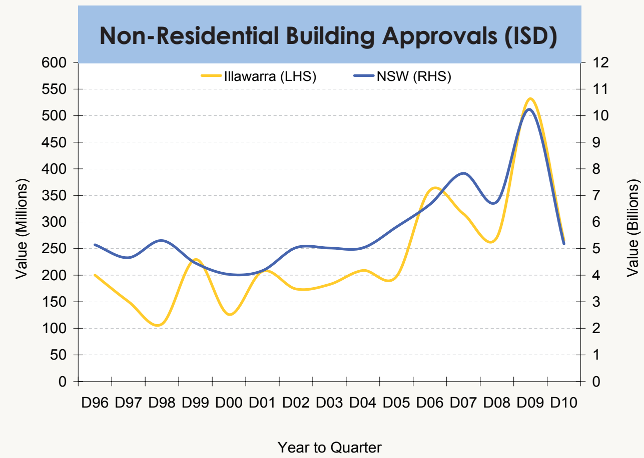
- The total value of non-residential building approvals in the ISD recorded a 7.4% fall, from $49.3 Million to $45.6 Million.
- Approvals across NSW totalled $1.2 Billion, which equates to an 11.4% fall.



Source: ABS Building Approvals Statistics



Source: ABS Building Approvals Statistics



Source: ABS Building Approvals Statistics

Tourism

Tourism Activity (WSD)

The number of domestic and international visitors nights spent in the Wollongong Statistical District was on a rise during the year to December 2010, as figures from Tourism NSW have shown:

- There was a 5.7% increase in the number of domestic overnight visitor nights to 2.4 Million, with the WSD receiving 4.1% of nights in regional NSW. 868,000 domestic overnight travellers spent on average $125 per night.
- The largest group (21.8%) of visitors was in age brackets between 35-44 year olds, followed by '55-64' year olds (20.2%)
- International overnight visitors spent 1.6 Million nights in the WSD, up 10.1% on the year to December 2009. This represents a market share of 14.7% of nights in regional NSW. On average, 54,100 international overnight visitors spent $78 per night (up 4.0%).
- The number of domestic day trip visitors was down 2.6% to 3.0 Million, with the WSD receiving 9.6% of all regional NSW daytrips (down by 0.7% on the previous year). Domestic daytrip visitors spent on average $79 per trip.

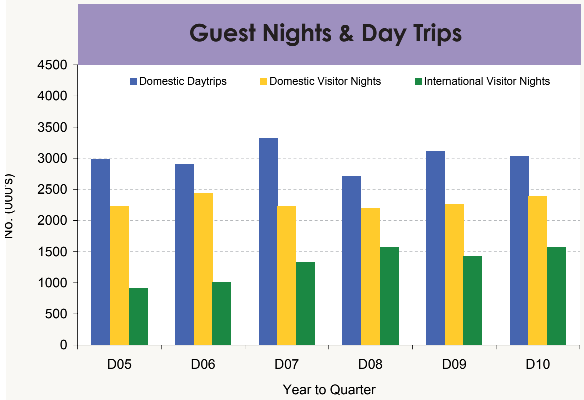
The total tourist expenditure in the Wollongong Statistical District improved 2.9% to $661.8 Million, compared to $643.5 Million in the year to December 2009.

- Expenditure by international overnight tourists improved to $123.1 Million, an increase of 14.5%.
- Expenditure by domestic overnight tourists grew by 6.6% to $299.0 Million, from $280.5 Million in the year to December 2009.
- Expenditure by domestic day travellers declined 6.2% to $239.8 Million.

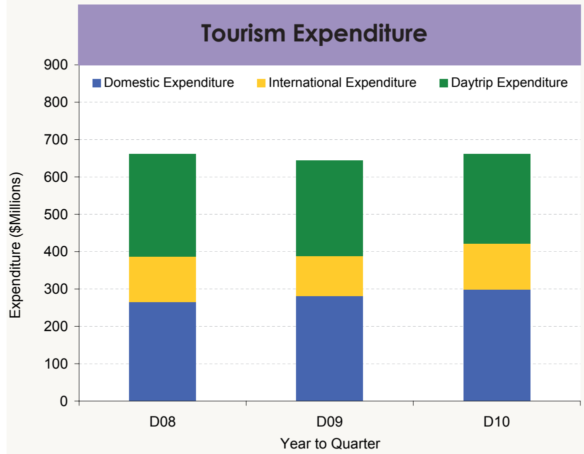
Accommodation Takings (ISD)

Accommodation revenue from tourist establishments in the Illawarra improved by 8.5% in the year to December 2010, to $81.4 Million:

- Takings in the Wollongong Statistical District have continued to increase, growing 3.9% over the last 12 months to $42.9 Million (up from $41.2 Million)
- Takings in the Wingecarribee LGA rose significantly to $19.5 Million (up 17.6%), while takings in the Shoalhaven LGA recorded an increase of 10.9% to $19.1 Million.
- December quarter takings from ISD accommodation rose in 2010 to $21.9 Million, up 8.7% from the same period last year.



Source: Tourism NSW (2010), Travel To Illawarra



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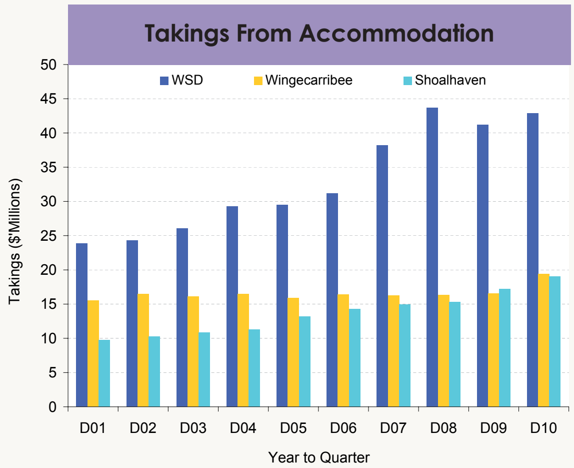


Source: ABS Survey of Tourist Accommodation

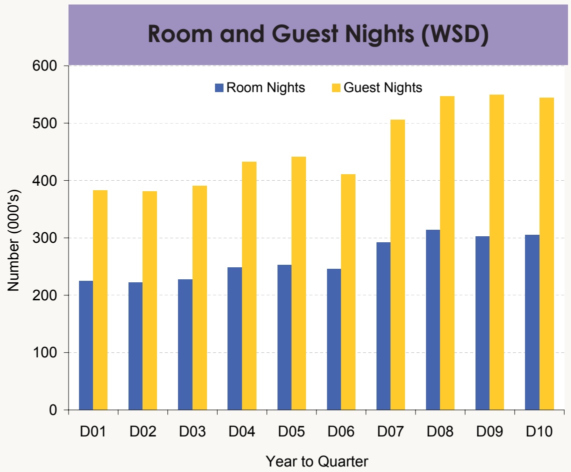
Wollongong Statistical District

The tourist accommodation sector in the Wollongong Statistical District experienced mixed results in the year to December 2010:

- » The number of room nights increased from 302,297 to 304,804, a marginal increase of 0.8%.
- » However, guest nights fell 1.0% to 543,716, a good result considering guest arrivals decreased by 7.1% at the same time.

Compared to the December 2009 quarter, the results show a decline:

- » Guest nights decreased by 4.1% to sit at 143,981, down from 150,158 nights.
- » Room nights slipped to 79,046 in the December 2010 quarter, down by a slight 0.5%.



Source: ABS Survey of Tourist Accommodation

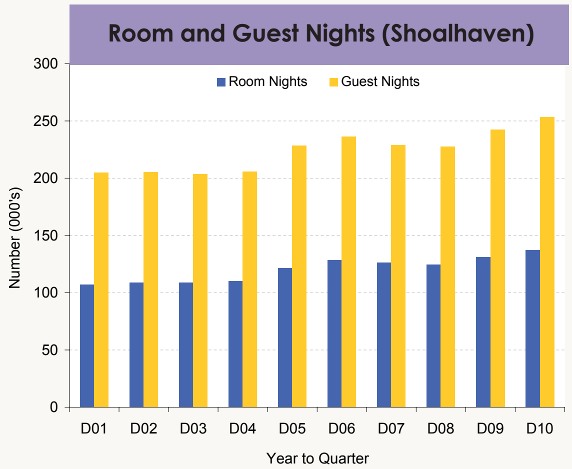
Shoalhaven

The tourism industry in the Shoalhaven LGA experienced more positive results during the twelve months to December 2010:

- » Room nights improved by 4.9% to 137,360, up from 130,946 room nights recorded in the year to December 2009.
- » An increase of 11,105 guest nights (to 253,461) was recorded, which translates to growth of 4.6%.

The results for the December quarter 2010 were just as encouraging:

- » Guest nights stood at 69,905, up 2.8% from 67,988 in the three months to December 2009.
- » Total room nights for the quarter were up 4.9%, an increase of 1,742 nights to 37,364.



Source: ABS Survey of Tourist Accommodation

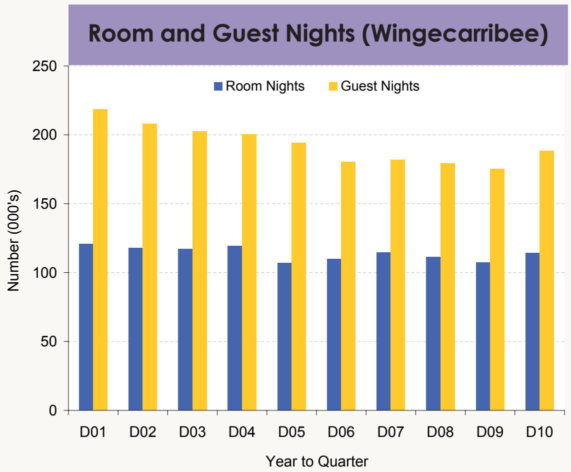
Wingecarribee

The tourist accommodation industry in Wingecarribee LGA progressed over the year to December:

- » The number of room nights increased by 6.7% to 114,409.
- » There was a 7.4% increase in guest nights to 188,389, up from 175,426 nights in the previous year.

The tourism sector strengthened when comparing the current quarter with the December 2009 quarter:

- » Guest nights rose to 48,784, an increase of 3.8% or 1,768 nights.
- » There were 29,111 room nights, up 6.0% from 27,474.



Source: ABS Survey of Tourist Accommodation

Investment

The following list represents the majority of large developments ($1M and over) taking place in the region up to the date of publishing. Those developments that have been approved to be built are indicated by an 'A' , a project which has been completed in the current quarter is indicated by a 'C' and those currently under construction or have had their construction certificates approved are indicated by a 'U/C'. (A full list of current and recently completed projects is available by contacting IRIS Research).

Infrastructure and Public Utilities

Organisation	Development	Status	Value
South Eastern Sydney - Illawarra Area Health Service	Wollongong - Psychiatric emergency care unit	U/C	$5.5M
	Shellharbour - Shellharbour Hospital Renal Unit for Dyalisis	U/C	$4.5M
	Shellharbour - Child and Adolescent Inpatient Unit	U/C	$4.4M
NSW Public Works	South Nowra - South Coast Correctional Centre	C	$122.0M
	Wollongong - TAFE blocks refurbishment	C	$3.9M
	Wollongong - Illawarra Sports High School sporting facilities upgrade	C	$1.3M
	Shellharbour - TAFE Child Studies & Childcare Centre	U/C	$5.1M
	Wollongong - Wollongong Performing Arts New Performance Venue	U/C	$3.5M
	Kiama - Kiama's High School (New Gymnasium)	U/C	$3.1M
	Wollongong - TAFE Metal Fabrication Centre - ITC	U/C	$.1M
The University Of Wollongong	Building 24	C	$10.0M
	SMART Infrastructure Building	U/C	$40.0M
	P&DII Building	U/C	$33.0M
	Enterprise 1 Building	U/C	$31.3M
	UniCentre Refurbishment	U/C	$6.8M
Roads and Traffic Authority	Kings Highway - Road Safety Improvements	C	$26.0M
	Tuross Bridge - Stripping lead based paint and applying new lead-free paint	C	$3.2M
	South Nowra - King Horne to Forest Road	U/C	$67.0M
	Picton Road - Road Safety Strategy	U/C	$40.7M
	Figtree - Major intersection improvements at Princes Highway	U/C	$15.0M
	Lanyon Drive - Duplication of existing carriageway incl. construction of bridge	U/C	$8.0M
	Rossi Bridge - Maintenance and upgrade	U/C	$7.5M
	Princes Highway - Construct heavy vehicle rest areas at Jerrawangala & Broulee Road	A	$8.0M
	Nandudga Lake Bridge - Replacement and construction of new bridge	A	$2.7M
Department of Housing	Corrimal - 16 x 1 br and 10 x 2 br - pensioner housing	C	$12.6M
	Wollongong - 12 x 1 br & 14 x 2 br & 13 parking spaces - general affordable housing	C	$12.5M
	Wollongong - 32 x 1 br & 24 x 2 br & 20 parking spaces - seniors housing	U/C	$23.4M
	Towradgi - 17 dwellings - seniors housing	U/C	$4.5M
	Mount Warrigal - 12 dwellings - general housing	U/C	$4.0M
	Barrack Heights - 12 dwellings - affordable rental accommodation	U/C	$3.6M

Industrial and Commercial

Area	Development	Status	Value
Wollongong LGA	Port Kembla - Sinter Plant Ore Preparation Upgrade	U/C	$85.0M
	Wollongong - Replacement of western grandstand at WIN Stadium	U/C	$26.5M
	Wollongong - Construction of 13 storey commercial development	A	$31.5M
	Unanderrra - Nan Tien Educational and Cultural Facilities	A	$26.0M
	Unanderrra - Alt's and add't'ns to Cordeaux Lodge Hostel & Marco Polo Nursing Home	A	$14.1M
	Stanwell Tops - Demolition of existing structures and installation of swimming pool	A	$5.0M
	Unanderra - Construction of 4 unit industrial development with individual offices	A	$2.2M
Shellharbour LGA	Albion Park Rail - Demolition, construct Aldi store, 3 retail shops & 7 residential allotments	U/C	$4.5M
	Shellharbour City Centre - Church and hall including facilities	U/C	$4.0M
	Albion Park - Refurbishment of existing club and outdoor dining area	U/C	$2.0M
	Shell Cove - GP Super Clinic	U/C	$1.6M
	Shellharbour - Alterations and additions to existing Shellharbour Workers Club	A	$3.0M
	Shell Cove - Landscaped mound to screen Pioneer Quarry	Lodged	$3.1M
Shoalhaven LGA	Yerriyong - Aviation support facility	A	$9.0M
	Manyana - Supermarket, retail shops, professional suites and associated car parking	A	$3.3M
	Nowra - 3 storey brick office	A	$1.4M
	Bomaderry - Fast food outlet, car parking and associated signage	A	$1.5M
	Berry - Demolition of existing & construction of new supermarket	Lodged	$1.5M
Wingecarribee LGA	Robertson - Sewerage treatment plant	A	$17.5M
	Bowral - Mixed use development, 7 retail units, 52 home units & basement parking	A	$11.0M
	Mittagong - Water Reservoir	A	$4.3M
	Sutton Forest - Refurbishment of hotel and motel units	A	$10.0M

Residential

Area	Development	Status	Value
Wollongong LGA	Fairy Meadow - Demolition of a motel and construction of apartment buildings	U/C	$14.0M
	Horsley - Construction of a 90 bed residential care facility	U/C	$10.5M
	Woonona - Construction of 19 houses and 26 lot torrens title subdivision	U/C	$4.5M
	Figtree - 'Hillside at Figtree' construction of a 66 bed residential care facility	U/C	$4.4M
	Keiraville - Construction of student accommodation building	A	$38.4M
	Wollongong - Demolition of house, construction of 6 levels of residential & 2 levels of retail	A	$9.0M
	Wollongong - 50 residential apartments over basement parking and commercial ground floor	A	$8.0M
Kiama LGA	Kiama - Seniors living development - 52 villas, community facility and car parking	A	$2.8M
Shellharbour LGA	Albion Park - 4 townhouses and 6 villas with garages and strata subdivision	U/C	$1.5M
	Flinders - 4 townhouses and 6 villas with garages and torrens title subdivision	U/C	$1.3M
	Albion Park Rail - Demolish existing structures and construct 4 townhouses and 4 villas	A	$1.6M
	Flinders - 12 townhouses with garages	A	$1.5M
	Warilla/Barrack Heights - Demolish existing structures, construct 52 villas with garages	Lodged	$10.6M
	Shell Cove - Subdivision to create 71 residential lots, 4 super lots, 3 public reserves, etc	Lodged	$7.5M
Shoalhaven LGA	Sussex Inlet - 43 medium density units	A	$3.4M
	Milton - Masterplan for seniors living development	Lodged	$93.0M
Wingecarribee LGA	Burradoo - Seniors Living 53 dwellings	U/C	$13.0M

About IRIS

Profile Illawarra
Profile Illawarra is a quarterly economic review of the Illawarra region providing an up to date summary of economic performance and development in the region.

Real Estate Report
A quarterly report on market activity in the Wollongong, Shellharbour, Kiama, Shoalhaven and Wingecarribee areas.

Consumer Sentiment Monitor
A quarterly update of consumer sentiment and spending patterns in the Illawarra Region.

Illawarra Business Survey
A quarterly report on performance and expectations of local business for the coming quarter. Analysis is presented by organisational size and industry.

Statistical Guide to the Illawarra
Updated annually, this is an easy to use, pocket sized pamphlet that covers a wide variety of interesting data.

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Report Notes

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