Limestone Coast Workforce

Analysis of supply, demand, emerging trends and opportunities and strategies for regional workforce development.
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Report prepared for the Limestone Coast Regional Development Board

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- Grant King (CEO, Limestone Coast Regional Development Board)
- Rob Forgan (Executive Officer, South East Local Government Association)
- Kelly-Anne Saffin and Bruce Roy (Regional Manager, Department of Trade and Economic Development)
- David Mezinec (Regional Manager, TAFE SA Mount Gambier)

In addition a wide range of industry, environment, employment, education and training organizations and representatives provided perspectives from across the region, either through focus groups or individual conversations. This has ensured that both quantitative and qualitative data add breadth to the report.
Contents
EXECUTIVE SUMMARY ............................................................................................................................................... 6
Key findings and recommendations for current workforce supply:................................................................. 6
Key findings and recommendations for current workforce demand:............................................................... 7
Key findings and recommendations for new and emerging demand:............................................................. 8
Key findings and recommendations for Population and Promotion:............................................................. 9
INTRODUCTION ....................................................................................................................................................... 10
METHODOLOGY ....................................................................................................................................................... 11
THE REGION ............................................................................................................................................................. 12
Overview .............................................................................................................................................................. 12
Water resources .................................................................................................................................................. 14
Food and forestry ................................................................................................................................................ 16
Infrastructure ...................................................................................................................................................... 18
Key Industries ...................................................................................................................................................... 20
LABOUR SUPPLY ................................................................................................................................................... 21
Labour force characteristics .................................................................................................................................... 21
  Population and population growth ................................................................................................................... 21
  Town growth ................................................................................................................................................... 21
  Age profile ....................................................................................................................................................... 21
  Educational attainment ................................................................................................................................... 23
  Young people ................................................................................................................................................... 25
  Labour market indicators ................................................................................................................................ 27
  Current global impact ...................................................................................................................................... 28
  Part time work ................................................................................................................................................. 29
  Occupation of employment ............................................................................................................................. 31
  Occupation by Age and Sex ............................................................................................................................. 32
  Industry of employment .................................................................................................................................. 33
  Conclusion ........................................................................................................................................................... 36
LABOUR DEMAND ................................................................................................................................................... 37
Context ................................................................................................................................................................ 37
Vacancies ............................................................................................................................................................. 37
Industry Survey .................................................................................................................................................. 39
EXECUTIVE SUMMARY

This report details the existing workforce of the Limestone Coast region, outlines workforce development needs within the Limestone Coast region for key industries within the next five years, identifies potential new industries and their workforce needs, outlines promotion and population increase strategies to encourage people to work and live in the region and outlines a plan for ongoing workforce development monitoring and reporting. The eight industries the report focuses on are Agriculture, Forestry and Fishing, Manufacturing, Retail Trade, Health and Community Services, Education, Construction, Transport and Storage, and Accommodation, Cafes and Restaurants.

The key questions asked in writing the report were;

What is our current workforce supply?
What is our current workforce demand?
Where are the areas of possible new demand?
How will we meet existing and new demand?
How will we monitor and respond to workforce supply and demand over time?

The report identifies a number of key findings and recommendations.

Key findings and recommendations for current workforce supply:

- In line with other regions across Australia, the Limestone Coast has an aging population.
- Population growth is steady but below State and National averages. Town growth is confined to larger towns and coastal centres offering lifestyle advantages.
- Education levels are rising but are still below the average in South Australia, with the exception of qualifications at Certificate III and IV level. Given the steadily increasing employment opportunities in skilled jobs there is a need to “sell” the benefits of skills development and learning. The use of Recognition of Prior Learning within the region is low and a concentration on this methodology would lift skills levels while acknowledging the learning people already have.
- Young people in the region will not provide the replacement numbers required to maintain the workforce. Young people, especially young women, are likely to be employed in a narrow band of industry sectors.
- There are differences for both occupation and industry of employment for males and females and for age cohorts.
- Part time and casual work has increased. While unemployment has been low, current economic conditions have led to an increase in unemployment. A strategy to support individuals to manage part time and casual work and to encourage employers to increase the security of work conditions needs to be carried out.
• Employment in Agriculture, Forestry and Fishing and Manufacturing has declined, while there have been increases in Construction, Retail Trade, Accommodation, Transport, Education and Health and Community Services.

• The industries most at risk in terms of aging workforce are Agriculture, Forestry and Fishing, Education, Health and Community Services and Transport, which all have around 50% of their workforce aged 45 years or over. These industries need to look at promotion strategies to encourage new workers into their sector.

• The industries with the highest numbers of opportunities for people with Certificate III and IV are Manufacturing, Retail Trade, Construction, and Agriculture, Forestry and Fishing. The industries with the highest number of opportunities for people with Bachelor degree or above are Education, Health and Community Services, Manufacturing and Agriculture, Forestry and Fishing.

Key findings and recommendations for current workforce demand:

• Vacancy data gives some indication of demand in the region, but given the preferred use of “word of mouth” as a way of filling positions, more work needs to be done to accurately measure vacancies in the region.

• While the workforce survey gave an indication that those who responded mostly felt that they were good or okay at workforce development, the survey return rate was too low and spread across too many industries to give data that can be relied on. In addition, some businesses that felt they were doing things well had a high turnover rate, which may indicate a misunderstanding of the nature of workforce development. Comments from businesses may indicate that workforce development is primarily seen as the ability to recruit staff. The low rate of return could be due to many factors, including distribution method, interest in the survey and competing factors for the business. A process to survey key industries and industry sectors within the region on a regular basis should form part of a workforce development plan for the region.

• Land use within the region has changed over time, with matching changes to employment needs. The land use generating the highest employment numbers per 100 hectares at farm gate from a survey of sheep grazing, beef grazing, cropping, dairy farming, bluegum plantations and grape growing was grape growing followed by dairy farming. The land use generating the highest employment beyond farm gate was grape growing (winemaking). An understanding of the implications of land use on employment demand needs to be considered when looking at population growth, and further work on the employment needs of other land uses needs to be carried out.

• Four of the industries focused on have just below or above 50% of their workforce aged 45 years or over as of the 2006 census. These industries are Agriculture, Forestry and Fishing,
Education, Health and Community Services, and Transport and Storage. A strategy to encourage young people to work in these industries is vital.

- Health and Community Services, Construction and Education have shown strong growth in the period between census 2001 and 2006. At a national level, forecasts for growth are expected to remain strong in these sectors. Discussion and strategies to build the workforce for these industries needs to be coordinated and focused.

- Retail Trade, Accommodation, Cafes and Restaurants and Transport and Storage have shown moderate growth. Manufacturing has remained steady and Agriculture, Forestry and Fishing has seen a decline. Discussion and strategies to accelerate demand in these industries through new product or process development, value adding or services to industry need to be coordinated and focused.

- There are a range of organizations involved in workforce development in the region. Coordination and promotion of their contribution would better support workforce development understanding in the region.

- The workforce development plan outlines strategies to match supply and demand for labour in existing and emerging industries.

**Key findings and recommendations for new and emerging demand:**

- Without additional industry and business activity, the region will continue to grow slowly.

- The region has great potential and positioning itself as a powerhouse for the state would lead to accelerated opportunities.

- There are many opportunities available to the region which would build demand and therefore population. The key issue is to decide which ones are most viable for the region and then put concentrated effort into them. The areas outlined below seem the most likely to pursue. The workforce development and marketing plan are designed to support them.

- There are opportunities to further build on capabilities in water management and use and to target green industries and the greening of existing industries.

- The renewable energy sector needs to have coordinated across agency support. To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.

- There is a need to better engage the high spending sector of the tourist market.

- Given the availability of water both through the underground aquifer and rainfall, food and beverage production is seen as an area for expansion. Value adding processes including bottling, contract packaging and distribution and consolidators for marketing produce were seen as important to lift these sectors from “hobby” to a profitable and sustainable business level.
• There are opportunities for the Education sector to grow the number of students and the diversity of courses offered in the region. To enable this to happen, excellent linkages between all educational organizations – schools, TAFE/RTO’s/ Universities, will need to be in place. A draft Education sector strategic plan is at the discussion stage, which would facilitate these linkages.

• To build on current learning and skill development initiatives in Health so that they are sustainable and act as an attraction and retention strategy for the health and medical workforce, a research centre for health could be considered.

Key findings and recommendations for Population and Promotion:

• Employment growth needs to be seen as a benefit for current residents.

• The region has many benefits when competing for residents and needs to clarify and clearly define and promote these benefits.

• The potential residents to be targeted should add value to the region and could include young couples with and without children, young professionals, business entrepreneurs and investors and business owners seeking to expand or relocate.

• Marketing strategies need to emphasise the region as a place to work and live which has quality supporting and facilitating services.

• The marketing plan outlines strategies to market the region so that the population target is reached.
INTRODUCTION

While there are many definitions of workforce development, this report is premised on the belief that workforce development is essentially about developing strategies to match supply and demand for labour within an industry or a region to meet existing and new demand. The Government of South Australia defines workforce development as;

those activities which increase the capacity of individuals to participate effectively in the workforce throughout their whole working life, and which increase the capacity of firms to adopt high performance work practices that support their employees to develop the full range and their potential skills and value’ (Government of South Australia, 2003: 7).

Jacobs & Hawley (2007) argue that the emergence of workforce development as a new concept comes from the contemporary intersection of five interrelated streams: globalization, technology, the new economy, political change, and demographic shifts. They suggest that the scope of workforce development can be defined by four key areas of activity:

How schools and agencies prepare individuals to enter or re-enter the workforce;
How organizations provide learning opportunities to improve workplace performance;
How organizations respond to changes that affect workforce effectiveness; and
How individuals undergo life transitions related to workforce participation.

Both these definitions place both the individual and the business at the centre of workforce development practice

This report analyses five key aspects which affect workforce management and growth in the Limestone Coast: workforce supply, workforce demand, new and emerging industries, population growth and promotion strategies. The report looks at data over time and at local knowledge to develop a workforce development and a marketing plan for the region.
METHODODOLOGY
The report drew information and opinion from a number of sources. These are listed in the reference list.

- A literature review looked at workforce development models and case studies from across Australia and internationally. This enabled a broad background understanding of the processes and issues involved in workforce planning.

- Data to support an analysis of labour market supply and demand was drawn from the Australian Bureau of Statistics (particularly the Basic Community profile, the Time Series Profile and the Working Population profile) and from the Labour Market Information Portal. In addition, the 2009 Limestone Coast Regional Profile (DFEEST) was used, as was the Limestone Coast Regional Food Scorecard 2005-2006. As with any data, there are issues around reliability and validity. An added issue with census generated data is the age of the data, the latest of which relates to the 2006 census.

- Focus groups and conversations with individuals across the region provided opinion and information particularly in the area of workforce demand and new and emerging industry opportunities. Focus group questions are included as Appendix 1.

- A survey of businesses in the region gathered information about workforce development practice and about business projections. The economic world has changed dramatically since the survey was carried out in November 2008, so there are issues around the currency of the information. The survey questionnaire is included as Appendix 2.

- Changes to land use data, vacancy data over time compiled by DEEWR and by the Career Development Centre, Industry Workforce Summary data for individual industries provided by the Workforce Development Directorate (DFEEST) and Employment Outlooks for individual industries provided by SkillsInfo (DEEWR) were used when looking at workforce demand into the future.

- Maps were supplied by the South East Resource Information Centre (SERIC).
THE REGION

Overview

The Limestone Coast\(^1\) region lies midway between the capital cities of Adelaide and Melbourne, and covers the south-eastern section of South Australia. Its boundaries are the Victorian border to the east, the Southern Ocean to the west and the Tatiara District to the north.

The climate of the region is characterised by cool wet winters and mild to hot, dry summers. Average annual rainfall varies considerably within the region, from approximately 850mm in the south of the region to 450mm in the north of the region.

The region contains the Local Government Areas of Grant, Kingston, Mount Gambier, Naracoorte and Lucindale, Robe, Tatiara and Wattle Range. Approximately 40% of residents in the region live in the Mount Gambier LGA. When combined with the Grant and Wattle Range LGAs, the Lower South East area accounts for 70% of the region’s population of approximately 64,832 people, leading to a centralization of services and greater employment opportunities in that area. The upper south east area is served by Naracoorte and by adjoining service centres in Murray Bridge, Mount Barker and Adelaide. The towns of Millicent, Penola, Bordertown, Keith, Robe and Kingston provide local services. The largest towns in the region are Mount Gambier (24000 people), Naracoorte (5000 people), and Millicent (5,500 people).

Australian born people make up 85.9% of the population of the region. Migration is principally from the United Kingdom, Italy, the Netherlands, and more recently from New Zealand and South Africa. The Aboriginal population grew by 17.9% from 2001 to 2006 to 776 persons and has a young profile with 36.1% aged less than 15 years.

\(^1\) The Limestone Coast region and the South East region are used interchangeably in this report.
**Water resources**

Water from underground aquifers is a defining characteristic of the region, and allows diverse industry applications. It is a major point of difference for the region.

The South East is underlain by two aquifers, the confined lower aquifer which is separated from the upper unconfined aquifer by a layer of clays and marls, allowing only limited interaction between the two. Where faulting has occurred in the geological past there is some interchange of water between the two. The unconfined aquifer provides the majority of water extracted for irrigated agriculture. This aquifer is dependent on recharge from rainfall and has declined in recent times as a result of drought and increased extraction. The confined aquifer contains historic water which flows into the region from its source regions in the North East of Victoria. Access to the confined aquifer is restricted to approved industry and town supply.

Declining water levels and rising groundwater salinity are issues currently being faced by licensed water users in some water management zones. The South East Natural Resource Management Board has flagged reductions in water allocations in some areas where threats have been identified.

All groundwater extraction in the South East is regulated by the conditions of the Water Allocation Plans developed by the South East Natural Resource Management Board and administered by the Department of Water, Land and Biodiversity Conservation.

When combined with rainfall which is more reliable than in other regions in South Australia and a range of soils suitable for agriculture, there are great opportunities in the region for diversity of production. Irrigation within the region includes pasture for dairying, beef, hay, silage and lamb production; lucerne seed, wine grape, potato, fruit, olive, onion and vegetable production.
Food and forestry

The estimated Gross Food revenue in the Limestone Coast region in 2005-2006, including wine, was $1,320 million. (This figure takes into account the value of farm production, food value-adding, processing, packing and distribution, as well as food service and retail sales). At production level (farm gate) livestock, wine and field crops produced highest revenue over the years 2000 to 2006. In Gross Food revenue terms these industries also returned the highest revenue. Food processing in the region was valued at $836 million (wholesale value). Of this wine contributed 43%, livestock 31%, horticulture 15%, seafood 5%, field crops 4% and dairy 2%.²

Forestry is a major industry within the region, contributing to employment in the agriculture, manufacturing and transport sectors. The importance of forestry to the region over time cannot be underestimated. There are 107,611 hectares of softwood and 42,368 hectares of hardwood planted in the region.³ The majority of current investment in plantation forestry has been through Managed Investment Schemes (MIS) using private investment funds. The National Plantation Inventory 2008 notes that in Australia:

“Managed Investment Schemes funded about 81% of the new plantations in 2008, similar to the average for the previous five years. Government agencies planting on public land and in joint ventures on private land established 14%. Timber industry companies and other private owners established the remaining 5%.”

The current issues experienced by Managed Investment Schemes are therefore having a short term impact on harvesting and investment particularly for the hardwood industry within the region and causing hesitation and contraction of employment opportunities within sectors related to forestry.

In the longer term those trees currently in the ground need to be harvested and decisions made about future rotations, particularly those related to hard wood. The future of forestry in the region may look different but is likely to remain a defining industry sector in the future.

² The Limestone Coast Regional Food Scorecard 2005-06 was the source for this data. This scorecard is no longer produced at a regional level. Local information points to an increase in the share of dairy in current data.
³ Data compiled by the South East Resources Information Centre (SERIC), Mount Gambier, Updated July 2009.
**Infrastructure**

The region has multiple air services on a daily basis into and out of Mount Gambier from Melbourne and Adelaide. Flight time to these centres is approximately one hour.

The region is serviced by a network of roads including the Dukes, Princes and Riddoch Highway. Arterial roads within the region are open to B-Double transport vehicles.

Rail services in use in the region are confined to the line which runs from Adelaide through Bordertown to Melbourne. Unused railways within the region exist from Heywood in Victoria, through Mount Gambier to Millicent and from Mount Gambier through Penola and Naracoorte to Wolseley near Bordertown. Reopening of these lines would entail gauge conversion to broad gauge to match adjoining rail services.

The region uses the Port of Portland for movement of commodities into and out of the region. The Port of Portland is a deep water bulk commodity port used for grain, woodchips, logs, aluminum ingots, livestock, alumina, liquid pitch and fertilizer products.

Gas and electricity networks provide energy across the region. Low emissions energy production through wind, biomass and geothermal technologies present opportunities for diversification of supply.

Increasing pressure on the infrastructure of the region from a range of industries is recognized in the Green Triangle Freight Action Plan 2009, which is a joint South Australian and Victorian Government initiative outlining investment for anticipated increased loads on road, rail and port infrastructure. The plan recognizes the sometimes competing needs and opportunities for residents, industries and commodities such as tourism, timber, wine, grain, dairy, meat processing, livestock, wool, fertilizer and horticulture.

While major towns within the region are broadband enabled and the switchover to digital TV in the region is scheduled for July to December 2010, the region would benefit from improved mobile phone and high speed internet access.
**Key Industries**

This report concentrates on eight industries within the region. Agriculture, Forestry and Fishing, Manufacturing and Retail Trade account for 50.1% of employment in the region. The other industries analysed in this report are Education, Health and Community Services, Construction, Accommodation, Cafes and Restaurants and Transport. These eight industries account for 79.1% of employment in the region.

![Employment numbers by industry. Source 2009 Limestone Coast Regional Profile](image-url)
LABOUR SUPPLY

Labour force characteristics

Population and population growth
The estimated population of the Limestone Coast has grown at a rate just below the State average in the last few years. The working age population of the region is expected to peak in 2011 and slowly decline in the following years. Population growth is not even across the region with decreases in the Upper South East areas and increases in the Lower South East.

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Change from previous year</th>
<th>South Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2005</td>
<td>63,499</td>
<td>0.7%</td>
<td>0.5%</td>
</tr>
<tr>
<td>June 2006</td>
<td>64,615</td>
<td>1.8%</td>
<td>1.7%</td>
</tr>
<tr>
<td>June 2007</td>
<td>64,832</td>
<td>0.3%</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Source: Australian Bureau of Statistics, Estimated resident Population, from 2009 Limestone Coast Regional Profile

Town growth
While Mount Gambier, Penola, Millicent, Kingston, and Bordertown have shown slight increases in population between 2001 and 2006, Robe has seen a significant increase (over 30%). Naracoorte and Keith have seen a decrease in population size.

Age profile
The Limestone Coast has above average proportions of children (0 to 14 years) compared to the State average. Time series data shows that this is not reflected in working age population figures, with lower than state average numbers of young people (15 to 34 years) compared to the state average, and compared to anticipated numbers based on the numbers of children. The region’s 10 to 14 year olds in 1996 (4921) have become 20 to 24 year olds by 2006 and have dwindled to 3404. The figures show some reversal of this trend from age 25 years. The region has above state average numbers of adults (35 to 50 years) and lower proportions of older people (60 years or older).

The median age for the region has grown from 34 years to 37 years from 1996 to 2006. Median household income has grown over this time from $548 to $874, with similar increases in median housing loan repayments from $563 to $867 monthly.

The working population profile shows an increase from 1996 to 2006 in the 15 to 19 year age group, a decrease in the 20 to 44 year age group and an increase in all older age groups. This has labour supply implications as the working age of the population continues to increase and the numbers of replacement workers decrease over time.
The estimated working age population data for 2007 reflects an aging workforce with fewer replacement worker numbers in the 15 to 34 year age groups. The 35 to 54 year age ranges have the largest number of workers. This has implications within the next ten years as these cohorts age.

Educational attainment
The level of educational attainment has grown over time in the region, with significant growth in Certificate III and IV and bachelor degrees, reflecting the growth in trades and professional jobs within the region. The region has lower than state proportions of individuals with a Degree or higher (6.7% compared with 13.0% for the state) and above average proportions of people with Certificate III or IV level qualifications. *(2009 Limestone Coast Regional Profile)*
People with a Bachelor degree or higher, work in greater numbers in the industries of Agriculture, Manufacturing, Education, Health and Community Services and Property Services. The high numbers in Agriculture, Forestry and Fishing may point to increasing skill needs as enterprises become larger, use advanced technology for irrigation, forest management, pasture management and animal husbandry.

People with a Certificate III or IV, work across all industries with higher numbers in Retail and Wholesale Trade, Construction, Manufacturing and Agriculture, Forestry and Fishing.

Source: Australian Bureau of Statistics, Expanded Community profile 200
**Young people**

Of those young people (15 to 24 years) in the region who are working, 2349 were in full time work, while 1496 were in part time work at Census 2006. Part time work is defined as working between 1 and 34 hours per week. There were 465 part time workers aged 20 to 24 years and 1,030 aged 15 to 19 years. 522 of the part time workers were male and 973 were female.

![Chart showing employment status of young people](chart.png)

*Source: 2006 Census Community Profile Series, Working Population Profile*
Young men are concentrated in Retail, Accommodation, Construction, Manufacturing and Agriculture, Forestry and Fishing, while young women are concentrated in Retail and Accommodation industries.
In 2007 there were 838 apprentices and trainees in the region aged 15 to 24 years. The largest numbers of these were in the Manufacturing, Construction, Retail Trade, Accommodation, and Administrative and Support Services industries. (National Centre for Vocational Education Research). This is not a clear match for regional job opportunities.

The retention rate to year 12 has improved over the last five years, but remains below the state average. The Year 8 to 12 retention rate in Government schools in the Limestone Coast in 2008 was 76.4%, approximately 8% lower than the State average.

Child Adolescent Mental Health Services estimated that on average, around 20% of mental health related admissions in the region are for young people.

**Labour market indicators**
The unemployment rate in the region fluctuates and is higher in the lower south east than the upper south east. It is consistently lower than the state average over time.

Unemployment in the region has risen from 2005 onwards, and is uneven across the region, with the highest rate of unemployment in Mount Gambier. The average job seeker age is 35 years and the average job seeker unemployment duration is 25 months. There are larger numbers of people registered with Job Networks in the 25 to 44 year age group. The unemployment rate measures those individuals who are not working one hour or more per week, and therefore does not capture part time workers. In addition, the high level of seasonal work in the region, (in viticulture, horticulture, forestry and agriculture generally), leads to insecure work for a significant number of workers. This is not
always captured in unemployment figures. Those individuals who are not registered with Job Networks are not captured in the figures.

![Diagram: Job Network Newstart Customer Population by Age Group, December 2008 Chart Source: DEEWR administrative data.]

![Diagram: Job Network Customer Population By Unemployment Duration, December 2008 Chart Source: DEEWR administrative data.]

**Current global impact**

Anecdotal information from Job Network providers, Centrelink and the Career Development Centre based in Mount Gambier shows a shift in the last six months in the labour market, as industries respond to global market pressures. The result of this has been an increase in unemployed numbers, an increase in part time, contract and casual positions and an increase in retrenchments. Longer term changes from 2001 to 2006, show a drop in employment in agriculture and manufacturing, which may reflect drought conditions and increased mechanisation. Construction, Health and Community Services and Education have shown increases in employment numbers.
Part time work
The numbers of individuals who are employed part time or employed but away from work (in the week before the census) has grown from 1996 to 2006, while full time work and unemployed numbers fell in that period. High part time work numbers in the 30 to 44 year range may reflect parenting responsibilities, although they also reflect high Job Network customer numbers in those age groups.
The industries that offer the greatest opportunity for full time employment include Manufacturing, Construction and Agriculture, Forestry and Fishing and those offering the least opportunity include Retail Trade, Health and Community Services and Accommodation, Cafes and Restaurants.

**Full time employment by Industry.** **Chart Source:** 2006 Census of Population and Housing based on place of usual residence
The occupations that offer the greatest opportunity for full time work include managers and tradespersons and those offering the least opportunity are labourers and all categories of clerical workers.

**Full time work by occupation.** Chart Source: 2006 Census of Population and Housing based on place of usual residence.  
*Note: Part-time employment covers those persons who worked between 1 - 34 hours during the week prior to Census night.*

**Occupation of employment**

Males dominate the Manager, Technician and Trades workers, Machinery Operators and Labourer occupations, while females have stronger numbers in the Professional, Community and personal service, Clerical and Administration and Sales occupations. Females have increased their numbers over time in their dominant professions, while males have shown the greatest increase in the Technician and Trades workers and Labourer occupations.

**Occupation over time by gender.** Source: Australian Bureau of Statistics Time series data.
The numbers employed in the labourer category in the region have dropped from 2001 to 2006, and national data points to an acceleration in this trend. This has implications for those in the workforce who do not have accredited training. Some in this group may benefit from a skills recognition process, which would give formal recognition of skills they have, and identify gaps for training to ensure their continued employability.

![Bar chart showing employment numbers by occupation from 2001 to 2006.](chart)

*Source: Australian Bureau of Statistics Time series data. 2006 employment numbers and changes in employment numbers by industry.*

**Occupation by Age and Sex**

The 45 years and over age group has large numbers of managers as an occupation reflecting the high numbers of agricultural enterprises in the region, as farm owners are categorized as managers. The professionals within the region are younger, reflecting the tag “nursery ground” which is sometimes given for first appointment professionals within the region, who may find less completion than in urban areas for work. The challenge is to keep them in the region subsequently.

![Bar chart showing employment numbers by occupation and age group in 2006.](chart)

*Chart Source: 2006 Census of Population and Housing based on place of usual residence.*
Industry of employment
Males over the time 1996 to 2006 and of any age are employed in the greatest numbers in Agriculture, Forestry and Fishing, Manufacturing, Construction and Retail Trade, with the exception of the 55 to 64 year age range which also has strong numbers in Transport. Females are currently employed in the greatest numbers in Retail Trade, Health Care and Social Assistance, Agriculture, Forestry and Fishing and Education. This has remained reasonably consistent over time. Younger women aged 15 to 24 years are employed in much higher numbers in Retail and Accommodation and Food services than the overall cohort of females.

Employment by industry sector over time by gender. Source: Australian Bureau of Statistics Time series data.

Source: Australian Bureau of Statistics 2006 Census data: Industry of employment by age by sex

Female employment by Industry sector 2006.

Source: Australian Bureau of Statistics 2006 Census data: Industry of employment by age by sex
Over 50% of workers in the Agriculture, Forestry and Fishing and Health and Community Services industries are aged 45 years and over. Education and Transport and Storage have slightly less than 50% of workers aged 45 years and over. These four industries face significant workforce issues as this cohort leaves the workforce.

**Age of workers by Industry sector 2006.**

*Chart Source: 2006 Census of Population and Housing based on place of usual residence.*
Conclusion
In line with other regions across Australia, the Limestone Coast has an aging population.

Population growth is steady but below State and National averages. Town growth is confined to larger towns and coastal centres offering lifestyle advantages.

Education levels are rising but are still below the average in South Australia, with the exception of qualifications at Certificate II and IV level. Retention levels of young people at school to Year 12 is growing but is below state levels.

Young people in the region will not provide the replacement numbers required to maintain the workforce. Young people, especially young women, are likely to be employed in a narrow band of industry sectors.

There are differences for both occupation and industry of employment for males and females and for age cohorts.

Part time and casual work has increased. While unemployment has been low, current economic conditions have led to an increase in unemployment.

Employment in Agriculture, Forestry and Fishing and Manufacturing has declined, while there have been increases in Construction, Retail Trade, Accommodation, Transport, Education and Health and Community Services.

The industries most at risk in terms of aging workforce are Agriculture, Forestry and Fishing, Education, Health and Community Services and Transport, which all have around 50% of their workforce aged 45 years or over.

The industries with the highest numbers of opportunities for people with Certificate II and IV are Manufacturing, Retail trade, Construction, and Agriculture, Forestry and Fishing. The industries with the highest number of opportunities for people with Bachelor degree or above are Education, Health and Community services, Manufacturing and Agriculture, Forestry and Fishing.
LABOUR DEMAND

Context
In the past twelve months, industry within the region has been affected by macroeconomic factors and local conditions. The global economic crisis has severely affected industry with constrictions in markets. Changes in the Australian dollar have shifted commodity prices and input costs. Drought conditions have cut farm income with flow on effects to other sectors. Climate change and the expectation that it will be managed is leading to the need for skills to face the challenges it brings.

From a longer term view, technology is changing the expectations that industry has of its workforce, bringing challenges for the development of skills that are current and appropriate. Enterprises, particularly in the Agriculture sector, are becoming larger. All sectors are competing in a global market, without the advantages that come from low-priced labour. Regulatory frameworks around quality assurance for safety, environmental protection, tax compliance and traceability are in place and take time and knowledge to adhere to. These presume a higher level of skills than in the past.

Vacancies
Vacancies within the region are tracked by the Department of Education, Employment and Workplace Relations, gathered by monitoring online vacancies. While this does not give a complete picture as it does not capture word of mouth job opportunities, it gives an indication of trends in demand both in quantity and occupations. When considered against overall employment increase or decrease these figures also give an indication of retention within an industry.

Vacancies July 2007 to February 2009 Source: DEEW
Vacancies in the region have also been tracked by the Career Development Centre in Mount Gambier for the last twelve months. These add local newspaper advertisements to the vacancy mix. Again, they do not give a complete picture, but identify the substantial number of vacancies that are advertised locally. They also give an indication of seasonal opportunities.
Industry Survey

Survey Design
A survey was conducted in November 2008 to provide a picture of workforce demand in the region. A copy of the questionnaire has been included in Appendix 3. The survey aimed to provide information about the eight key industries in the areas of:

- Business growth
- Workforce size
- Workforce composition by occupation
- Staff turnover rate
- Recruitment methods
- Level of difficulty in filling vacancies
- Promotional strategies
- Workforce Development expertise
  - Workforce Planning rating
  - Attraction, retention and selection rating
  - Induction, training and development rating
  - Motivation, management and reward rating
  - Retaining and supporting rating
  - Leading and communication rating
Survey distribution
The survey was available online and was widely disseminated through the data bases of people working with the industries and through industry data bases. In addition, radio interviews and meetings with industry groups were used to encourage participation. 130 questionnaires were returned. Given this sample size, and the substantial changes which have occurred on the global economic climate since the survey was completed, the results of the survey need to be treated with great caution. It is recommended that future surveys be carried out, using the same questions, in a more targeted manner (that is, focusing on one sector of an industry) and over time. This will allow the region to build longitudinal data about specific sectors and to measure progress made in workforce development.

Survey results
Of those completing the survey, 30 % were from Agriculture, Forestry and Fishing, 12.7% from Manufacturing, 5.5% from Construction, 8.2% from Retail trade, 9.1% from Accommodation, Cafes and restaurants, 6.4% from Transport and Storage, 10.9% from Education (mostly post school), and 17.3% from Health and Community Services.

Growth rate
49.5% of businesses who responded expected a business growth rate that was steady, while a further 37.6% expected a 5% to 10% growth rate. This may well have changed given the current economic climate.

Number of staff
34% of respondents employed 10 or less individuals while 21.8% responded that they employed more than 100.

Staff turnover rate
Staff turnover rate was below 20% for most of the businesses surveyed. There were some large businesses with high staff turnover, and on average smaller businesses had lower turnover rate.

<table>
<thead>
<tr>
<th>Staff turnover rate</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>74.4%</td>
</tr>
<tr>
<td>10-20%</td>
<td>14.6%</td>
</tr>
<tr>
<td>20-30%</td>
<td>4.9%</td>
</tr>
<tr>
<td>30-40%</td>
<td>2.4%</td>
</tr>
<tr>
<td>40-50%</td>
<td>0.0%</td>
</tr>
<tr>
<td>50-60%</td>
<td>1.2%</td>
</tr>
<tr>
<td>70-80%</td>
<td>0.0%</td>
</tr>
<tr>
<td>80-90%</td>
<td>0.0%</td>
</tr>
<tr>
<td>90-100%</td>
<td>1.2%</td>
</tr>
<tr>
<td>100%+</td>
<td>1.2%</td>
</tr>
</tbody>
</table>
Reasons for staff turnover
The three highest reasons for staff turnover were seasonal work, transient staff and family requirements. Accommodation, travel and town size were not seen as a major issue.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seasonal Work</td>
<td>25.5%</td>
</tr>
<tr>
<td>Transient Staff</td>
<td>42.6%</td>
</tr>
<tr>
<td>Family Requirements</td>
<td>36.2%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>0.0%</td>
</tr>
<tr>
<td>Size of Town</td>
<td>8.5%</td>
</tr>
<tr>
<td>Travel Required</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

Recruitment methods
The most commonly used recruitment method was word of mouth, followed by the local media. Job Networks were used by only 14.1% businesses, which may reflect a perception that these agencies are job seeker rather than employer focused. This is also reflected in comments made by businesses in discussion with them.

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of mouth</td>
<td>62.8%</td>
</tr>
<tr>
<td>Local media</td>
<td>60.3%</td>
</tr>
<tr>
<td>Job Placement/recruitment agency</td>
<td>48.7%</td>
</tr>
<tr>
<td>Job Networks</td>
<td>14.1%</td>
</tr>
<tr>
<td>Skilled Migration</td>
<td>11.5%</td>
</tr>
</tbody>
</table>

Difficulty in filling vacancies
The areas which respondents most often found sometimes or always difficult to fill were managers, professionals and technicians and trades. The area least difficult to fill was clerical and administration. This may have changed since late 2008 as the global financial situation has changed.
Promotion materials
53.7% of companies had promotion materials available. These materials included websites and brochures. Most of the materials are not focused on attracting potential workers to the business.

Workforce Planning
The majority of businesses who responded to the survey believed they were doing well or okay in the area of business planning. Comments included:

- No written action plan, however well aware of requirements.
- Workforce planning is addressed on a monthly basis through our Management meetings and at a Corporate level, a special project has been created to address future staffing requirements etc
- The high level plan exists and the coherent organizational strategy is evolving currently.
- Due to growth of the organisation, HR dept had to be established, but is still struggling with day-to-day issues vs. strategic planning.
- I work with a HR professional and report to a Senior Manager who have more direct impact on workforce planning and funding issues, but I can influence the directions with my recommendations for what should happen locally.
- Putting in machinery to remove labour.
- Much more aware of all these areas since commencing a Grad Cert in Business Management this year.

![Industry Self assessment of Workforce planning practice](image-url)
**Attract, recruit and select**

Business self ratings were again high but with greater numbers not doing it and needing advice. Comments included:

- *Now part of large organization, with human resources department.*
- *We are an equal opportunity employer and have very good recruitment procedures in place.*
- *The organization is constantly refining its processes and procedures to meet the evolving context.*
- *I work within a very large organization who have well developed recruitment and selection practices.*
- *We have a good employee record, know who/what works best for us. Look after our casual employees so they will return again if asked.*
- *From a business management perspective, I think this area is my greatest challenge but I don’t really know where to go for more information/assistance.*
- *Recruitment is completed through e-recruit.*
- *Do not require staff at the moment but would consider skilled migrant when need arises.*
- *Because our business requires a large component of telemarketing, it is difficult to find the right people for the job, and in giving multicultural people a try, it just hasn’t worked.*

![Industry Self assessment of attraction, recruitment and selection practice](image-url)
**Induct, train and develop**

The majority of businesses rated themselves as doing this well or okay, although a number were not interested or felt they did not need it and others were thinking about it. Small business may see this area as one that does not apply to them. Comments included:

- **All our workers are employed on the basis of training and it is our main concern to ensure they have a safe work environment, through proper job safety analysis, OH&S training/inductions and ongoing reviews of these measures.**

- **Induction is critical and undertaken at all times a new employee attends the workplace.**

- **I manage a team that involves staff who report to another person, who is therefore responsible for induction. So I've indicated that some practices are OK, because there have been 'gaps' in performance.**

- **Room for improvement in this area.**

- **Training is responsive rather than planned. Organisation is however, committed to continuous improvement and continuing training and development.**

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**Industry Self assessment of induction, training and development practice**

![Chart showing self-assessment results for induction, training, and development](chart.png)

- **Team training plan in place**
- **Training needs analysis carried out**
- **Policy documents in place**
- **Induction checklist in place and used**
Motivate, manage and reward performance
Business rated itself reasonably highly in this area, although there were numbers who were either thinking about it or not doing it for a range of reasons. Comments included:

- **Regular field visits for performance monitoring and awards nights for outstanding performance nominee's as well as exit interviews and feedback surveys.**
- **A new Individual Performance Management Process is currently out for consultation**
- **Very small team, feedback very direct and quick, still we do formal quarterly reviews. Feedback from employees is very good.**
- **Once again, areas for improvement here too.**
Retain and support
The majority of businesses rated themselves as doing this well or okay, although significant numbers were either thinking about it or not doing it for a range of reasons. Comments included:

- *No employee has left our small team yet...*
- *Employee Assistance Program is in place and available. Some flexibility in working arrangements can be accommodated, depending on the role of the worker*
Lead and communicate
Business rated itself highly in this area, and also indicated either thinking about it or not doing it for a range of reasons. Numbers for those looking for advice were higher in this area than in others. Comments included;

- Several years ago implemented a Communication Strategy process which has a structured process to ensure all staff receive information of significance within a 7 day time frame.
- The organisation has devoted considerable energy to leadership development in recent times. Communication is a constant challenge for any large organisation.
- My comments only relate to the staff I directly manage, but I lead a larger team of staff because they are located here, but who report formally to a different person.
- We all had various training, workshops, uni courses etc - we just need to keep on top of it.
Land Use Change

Changes in land use within the region have the potential to change the demand for employment both in quantity and type. A report prepared for the Socio-Economic impacts of land use change in the Green Triangle and Central Victoria project identified changes in land use and the impact of these changes. The study region included all Local Government Areas in the Limestone Coast with the exception of the Tatiara region. It looked at six agricultural sectors—beef grazing, bluegum plantations, broadacre cropping, dairy farming, grape growing and sheep grazing. It showed a decline in sheep and lamb numbers, an increase in beef cattle numbers, broadacre cropping, blue gum plantations, grape growing and dairy farming in the region in the period from 1991 to 2006. It found that increased efficiencies in labour and production have led to slower increases in employment.

The report identified employment generated per 100 hectares to farm gate and beyond in 2008. The land use generating the highest employment numbers per 100 hectares at farm gate was grape growing (range of 5.0 to 10.0 jobs), followed by dairy farming (Range of 0.9 to 1.7 jobs). The land use generating the highest employment beyond farm gate was grape growing (winemaking) (range of 6.5 to 7.0 jobs). 4

The report also identified key social changes associated with land use changes. (Preliminary Summary of findings of the Land Use Change project, pages 15, 16)

- Land use change from sheep grazing to cropping was associated with rural population decline, aging population, and a lower than average median household income.
- Land use change from sheep to beef grazing was associated with a lower rural population decline than average, a population which did not age more rapidly than average, and higher than average household income.
- Land use change from dairy to beef/sheep grazing or bluegum plantations was associated with a higher than average decline in rural population, and more rapid aging, compared to other regions.
- Land use change from grazing or cropping to grape growing was associated with population and employment growth, and higher than average household incomes.
- Land use change from sheep/beef grazing to dairy farming was associated with rural population growth (or slower than average decline in rural population), a younger than average population, higher income, higher employment and labour force participation.
- Land use change from sheep/beef grazing to blue gum plantations was not associated with an observable impact on rural population numbers on the community scale, although results of the survey did identify a small net population

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4 The authors note that these data are preliminary results and will be updated, but that overall trends will remain the same when comparing land uses.
loss at individual property scale. It was however, associated with a higher than average population turnover, with more new residents shifting into blue gum plantation regions than average.

- Growth in rural residential properties, no matter what the previous land use was, is associated with higher household income, but with variable changes in median age.
Key Industries

Agriculture, Forestry and Fishing

The agricultural industry in the region is diverse. Key sectors include beef, sheep, dairy, wool, seed, cropping, viticulture, aquaculture and horticulture.

<table>
<thead>
<tr>
<th>Area in hectares</th>
<th>Upper South East</th>
<th>Lower South East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals for grain</td>
<td>81,831.0</td>
<td>15,248.8</td>
</tr>
<tr>
<td>Vegetables for human consumption</td>
<td>2,264.7</td>
<td>1,470.8</td>
</tr>
<tr>
<td>Orchard trees (including nuts)</td>
<td>743.8</td>
<td>251.4</td>
</tr>
<tr>
<td>All fruit (excluding grapes)</td>
<td>743.8</td>
<td>252.5</td>
</tr>
<tr>
<td>Non cereal broad acre crops</td>
<td>52,054.4</td>
<td>10,701.7</td>
</tr>
<tr>
<td>Wine grapes</td>
<td>9,119</td>
<td>6,567</td>
</tr>
<tr>
<td>Forestry</td>
<td>Softwood 108,00 hectares; Hardwood 42,00 hectares</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Upper South East</th>
<th>Lower South East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheep and lambs</td>
<td>2,487</td>
<td>856,809</td>
</tr>
<tr>
<td>Milk cattle (excluding house cows)</td>
<td>7,704</td>
<td>54,619</td>
</tr>
<tr>
<td>Meat cattle</td>
<td>363,930</td>
<td>243,323</td>
</tr>
<tr>
<td>Pigs</td>
<td>8,500</td>
<td>17,104</td>
</tr>
</tbody>
</table>

Sources: Australian Bureau of Statistics; National Regional Profile, Upper South East, Lower South East Statistical Subdivisions released 28/07/08
Winemake\CircularTextUtilisation and Pricing Survey 2007, Phylloxera and Grape Industry Board of South Australia; Forestry Green Print 2008

Demand for employment in the region has dropped in the census periods 2001 to 2006 by 7.2%. This fall is likely to have continued in the period since then due to the effects of drought, the global financial crisis effect on markets, a glut in grapes, milk price reductions, timber product sales reductions, increased efficiencies through the use of technology, changes in land use, and a drop in private investment. This drop in employment level is in line with national falls which have seen, on average, a 1.6% fall per annum in the sector over the five years to February 2008.

At a national level, forecasts for growth within the sector are predicted to be less than for other sectors. The largest growth is expected for grain, sheep and beef cattle farming followed by horticulture and fruit growing and services to agriculture. These projections do not take the current global economic crisis into account.

Key employment in this region in this sector is in agriculture, forestry and logging and agriculture, forestry and fishing support services.

This industry sector has over half its workforce (52.3%) aged 45 years and over.
71% of the workforce is male.
79.3% of the workforce is in full time employment
The majority of agricultural enterprises within the region have less than 20 employees.
<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Opportunities</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Family structure of businesses with loyalty to the sector</td>
<td>Dwindling water supplies in other regions – horticulture, irrigated and high value crops</td>
</tr>
<tr>
<td>Strong understanding of the land and possible options for use</td>
<td>Blue gum harvest</td>
</tr>
<tr>
<td>Demonstrated ability to innovate</td>
<td>Climate change variability</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Weaknesses</strong></th>
<th><strong>Threats</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Seasonal work structure</td>
<td>Climate change</td>
</tr>
<tr>
<td>Dependency on contract labour and skills to manage this</td>
<td>Compliance issues around carbon reduction</td>
</tr>
<tr>
<td>Aging workforce, low wage structure</td>
<td>Confusion over water license requirements</td>
</tr>
</tbody>
</table>

**Likely future workforce picture:** Growth in demand driven by the forest and (possibly) horticulture sectors. Despite decreased demand from 2001 to 2006, 400 additional jobs across the region is a reasonable target for this sector in the next 5 years.
Manufacturing
Demand for employment in this sector in the region has remained steady in the census period 2001 to 2006 with a 0.1% increase. Current economic conditions are having an impact in the sector as forest products struggle to find export markets, engineering margins and markets contract and firms make decisions about the level of maintenance work they carry out. Longer term, there are opportunities for growth as these industries recover.

At a national level, forecasts for growth within the sector recognize that employment in this sector has fluctuated considerably from 2009 to 2008. In long term trends employment is expected to continue to decline overall. Food product, beverage, wood and paper pulp have slight growth projections, while metal product and machinery manufacturing are projected to decline. These projections do not take the current global economic crisis into account.

Key employment in this sector in the region is in food product, beverage, wood, pulp, paper, converted paper, primary metal, metal, fabricated metal, machinery and equipment manufacturing.
This industry has 36.3% of its workforce aged 45 years and over.
76.5% of the workforce is male.
87.2% of the workforce is in full time work
The majority of manufacturing enterprises within the region have less than 20 employees.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links between companies</td>
<td>Renewable energy sector work</td>
</tr>
<tr>
<td>Traditional sector for the region</td>
<td>Increase in meat processing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependency on local forest industry</td>
<td>Compliance and registration costs and skills to compete for large projects</td>
</tr>
<tr>
<td>Small firms competing on a global market</td>
<td></td>
</tr>
</tbody>
</table>

**Likely future workforce picture:**
Little growth in demand. Based on steady demand from 2001 to 2006 few additional jobs may be added to this sector in the next 5 years unless additional markets are found. Renewable energy may contribute although large projects may be carried out elsewhere. An increase in meat processing may lead to job growth in that area to offset losses in other areas. A reasonable target for this sector is 40 new jobs.
Construction
Demand for employment in this sector in this region grew by 28.1% in the census period 2001 to 2006. A strong economic cycle, residential property strength and low interest rates have contributed to this. Current economic circumstances have slowed this growth.

At a national level, forecasts for growth are projected to be higher than the average across all sectors, but subdued against past growth. These projections do not take the current global economic crisis into account.

Key employment in this sector in this region is in building construction and construction services. This industry has 36.7% of its workforce aged 45 years and over. 88% of the workforce is male. 83.6% of the workforce is in full time work. The majority of construction enterprises within the region have less than 20 employees.

**Strengths**
- Strong training sector
- Traditional sector for the region

**Opportunities**
- Renewable energy workforce requirements

**Weaknesses**
- Small businesses who have difficulty taking on apprentices
- Developing and maintaining a skilled workforce

**Threats**
- Compliance expectations
- Larger companies and consortia

**Likely future workforce picture:**
Growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers. Based on increased demand from 2001 to 2006, spending on Government funded infrastructure projects and on the projected needs of the renewable energy sector, 600 ongoing and 800 peak additional jobs is a reasonable target for this sector in the next 5 years.
**Retail Trade**

Demand for employment in the region has risen in the census period 2001 to 2006 by 5.2%. Demand in this sector is influenced by both the domestic and international economy. The ability of people to travel to retail centres and the increase of larger franchise and national brand stores is affecting smaller towns and enterprises within the region. As this is a sector which usually experiences high turnover as it traditionally has provided work for school students and young people, there are likely to be ongoing employment opportunities in the region.

At a national level, forecasts for growth are predicted to be slightly higher than other sectors, although these forecasts note a level of risk when forecasting for retail. The largest growth is expected in specialised food retail, supermarket and grocery stores and furniture, household and appliance retailing. A slight decline is projected in household equipment repair and motor vehicle retailing. These projections do not take the current global economic crisis into account.

Key employment in this region in this sector is in food, other store, motor vehicle and motor vehicle parts retailing.

This industry has 31.1% of its workforce aged 45 years and over
58.8% of its workforce is female
52.6% of the workforce is in full time work
The majority of retail enterprises within the region have less than 20 employees

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible use of labour</td>
<td>Tourism at 4-5 star level</td>
</tr>
<tr>
<td>Seen as a doorway to other occupations</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retaining a skilled workforce</td>
<td></td>
</tr>
</tbody>
</table>

**Likely future workforce picture:**
Moderate growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers.

Based on increased demand from 2001 to 2006, 200 additional jobs is a reasonable target for this sector in the next 5 years.
**Transport and Storage**
Demand for employment in this sector in this region grew by 6.8% in the census period 2001 to 2006. With an increased freight load in the region as the blue gum plantations are harvested, this growth can be expected to rise strongly.

At a national level, forecasts for growth in the sector are at slightly higher than the average across all sectors. Within the sector, storage, water, and services to air transport are projected to have the strongest growth, while other areas remain steady. These projections do not take the current global economic crisis into account.

Key employment in this sector in this region is in road transport and postal and courier pickup and delivery
This industry has 48.4% of its workforce aged 45 years and over
72.5% of its workforce is male
75.2% of the workforce is in full time work
The majority of transport and storage enterprises within the region have less than 20 employees.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major established firms within the region</td>
<td>Harvest of blue gums in the region</td>
</tr>
<tr>
<td></td>
<td>Increased use of road freight</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aging workforce</td>
<td>Compliance issues</td>
</tr>
<tr>
<td></td>
<td>Issues with MIS</td>
</tr>
</tbody>
</table>

**Likely future workforce picture:**
Growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers.
Based on increased demand from 2001 to 2006 and on the imminent blue gum harvest, 300 additional jobs is a reasonable target for this sector in the next 5 years.
Accommodation, Cafes and Restaurants
Demand for employment in this sector in this region increased by 7.9% in the census period 2001 to 2006. Increases reflect trends to eat out and to buy prepared food.

At a national level, forecasts for employment growth are slightly above the average for all sectors. Growth is expected to be strongest in pubs, taverns and bars, and cafes and restaurants. These projections do not take the current global economic crisis into account.

Key employment in this sector in the region is in food and beverage and accommodation. This industry has 33.4% of its workforce aged 45 years and over. 72.8% of its workforce is female. 38% of the workforce is in full time work. The majority of accommodation, café and restaurant enterprises within the region have less than 20 employees.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible work practices</td>
<td>Tourism at 4-5 star level</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining a skilled workforce</td>
<td></td>
</tr>
</tbody>
</table>

Likely future workforce picture:
Moderate growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers. Based on moderate increased demand from 2001 to 2006, 200 additional jobs is a reasonable target for this sector in the next 5 years.
**Education**

Demand for employment in this sector in the region has increased by 15.8% in the census period 2001 to 2006. Numbers of students in schools has remained reasonably static over the last five years. The establishment of a Centre for the University of South Australia and university courses by Southern Cross University in Mount Gambier, the rise in age for compulsory school attendance and the delivery of a range of training by Registered Training Organisations has influenced this increase.

At a national level, forecasts for growth in this sector are stronger than the average across sectors, but are subdued against growth in the past five years. Growth is expected to be strongest in school education and other education (which includes such sectors as ballet schools, nursing and theological colleges). Growth is projected to be slower in post school education. Changes in Government policy have the potential to affect these projections. These projections do not take the current global economic crisis into account.

Key employment in this sector in this region is in pre school and school, and tertiary education. This industry has 48.2% of its workforce aged 45 years and over 76.7% of its workforce is female 61% of the workforce is in full time work

The majority of education enterprises within the region have less than 20 employees.

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Opportunities</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborative approach developing across the sector enabling transitions from one sector to the next</td>
<td>Out of the region (intrastate, interstate and international) students</td>
</tr>
<tr>
<td></td>
<td>Provision of ‘just in time’ courses to meet emerging regional needs</td>
</tr>
<tr>
<td></td>
<td>Provision of courses for older cohort/retirees who are looking for recreational rather than work related learning</td>
</tr>
<tr>
<td></td>
<td>Teaching and Water related studies and degrees</td>
</tr>
<tr>
<td></td>
<td>Research at post graduate level</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Weaknesses</strong></th>
<th><strong>Threats</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aging workforce which is highly feminized and therefore likely to experience aging parent/grandchildren conflicts for retention Skills of existing workforce to adapt to change</td>
<td>Shifts in policy directions at a state and federal level</td>
</tr>
</tbody>
</table>

**Likely future workforce picture:**

Growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers.

Increased issues around succession planning and skills development for the workforce.

Based on increased demand from 2001 to 2006, university activity in the region, government policy to support skills development and current activity to grow student numbers in the region, 350 additional jobs is a reasonable target for this sector in the next 5 years.
Health and Community Services
Demand for employment in this sector in this region increased by 23.1% in the census period 2001 to 2006. The establishment of Mount Gambier Hospital as one of four regional hospitals in South Australia, an aging community, child care needs, growth in community and home based services, and higher expectations and possibilities for health care have all contributed to this increase.

At a national level, forecasts for employment growth in this sector are very strong, with employment growth averaging 3.4% per annum for the period from 1998 to 2008. The Child Care services, Hospitals and Nursing homes and Community Care services areas are projected to have strongest growth. These projections do not take the current global economic crisis into account.

Key employment in this sector in this region is in Hospitals, medical and other health care services, residential care and social assistance.
This industry has 53.6% of its workforce aged 45 years and over
84.8% of its workforce is female
43.6% of the workforce is in full time work
The majority of health and community services enterprises within the region have less than 20 employees.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
</table>
| TAFE SA and University of South Australia, Flinders University and Southern Cross University training and knowledge development programs in the region | Aging population in need of health services  
Development of niche health services  
Mount Gambier Hospital as one of four regional hospitals in South Australia  
Increased child care needs  
Growth in community and home based services  
Higher expectations and possibilities for health care |

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
</table>
| Aging workforce which is highly feminized and therefore likely to experience aging parent/grandchildren conflicts for attention which may affect retention | Escalating demands on the health budget  
Shifting policy directions at a state and federal level |

Likely future workforce picture:
Growth in demand particularly in the southern part of the region leading to the need for a greater number of skilled workers.
Increased issues around succession planning and skills development for the workforce.
Based on increased demand from 2001 to 2006, approximately 600 additional jobs is a reasonable target for this sector in the next 5 years.
**Workforce development initiatives**

A number of organizations provide services which support workforce development in the region. Federal, State and Local government, education and training organizations, employment services and private companies make up a mix of service provision which can be confusing to both the employer and potential employee. Links between these organizations are dependent on key individuals rather than defined structures and protocols.

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Data/Information</th>
<th>Funding/Programs</th>
<th>Expertise/Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Government Departments</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>State Government Departments</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Local Government</td>
<td>✅</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional Development Board/Area Consultative Committee</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>School transition programs</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Apprenticeships and Traineeships Organisations</td>
<td></td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Education and Training Providers</td>
<td></td>
<td></td>
<td>✅</td>
</tr>
<tr>
<td>Career Development Centre</td>
<td>✅</td>
<td></td>
<td>✅</td>
</tr>
<tr>
<td>Employment Services</td>
<td></td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Employer reference groups/associations</td>
<td>✅</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Conclusion
Vacancy data gives some indication of demand in the region, but given the preferred use of “word of mouth” as a way of filling positions, more work needs to be done to accurately measure vacancies in the region.

While the workforce survey gave an indication that those who responded mostly felt that they were good or okay at workforce development, the survey return rate was too low and spread across too many industries to give data that can be relied on. In addition, some businesses that felt they were doing things well had a high turnover rate, which may indicate a misunderstanding of the nature of workforce development. Comments from businesses may indicate that workforce development is primarily seen as the ability to recruit staff. The low rate of return could be due to many factors, including distribution method, interest in the survey and competing factors for the business. A process to survey key industries and industry sectors within the region on a regular basis should form part of a workforce development plan for the region.

Land use within the region has changed over time, with matching changes to employment needs. The land use generating the highest employment numbers per 100 hectares at farm gate from a survey of sheep grazing, beef grazing, cropping, dairy farming, blue gum plantations and grape growing was grape growing followed by dairy farming. The land use generating the highest employment beyond farm gate was grape growing (winemaking). An understanding of the implications of land use on employment demand needs to be considered when looking at population growth, and further work on the employment needs of other land uses needs to be carried out.

Four of the industries focused on have just below or above 50% of their workforce aged 45 years or over as of the 2006 census. These industries are Agriculture, Forestry and Fishing, Education, Health and Community Services, and Transport and Storage. A strategy to encourage young people to work in these industries is vital.

Health and Community services, Construction and Education have shown strong growth in the period between census 2001 and 2006. Retail trade, Accommodation, Cafes and restaurants and Transport and Storage have shown moderate growth. Manufacturing has remained steady and Agriculture, Forestry and Fishing has seen a decline. Discussion and strategies to accelerate demand in declining industries through new product or process development, value adding or services to industry need to be coordinated and focused.

There are a range of organizations involved in workforce development in the region. Coordination and promotion of their contribution would better support workforce development understanding in the region.

A regional workforce development plan which is jointly owned and put into action would benefit the region.
NEW AND EMERGING DEMAND

Overview
Focus groups and discussions with individuals provided rich data for this section of the report, as did involvement with a number of regional committees and industry groups. Persistent themes in these discussions led to the directions outlined, which include the positioning of the region as a strategic growth region for the state, targeting sectors for additional support and strategies to attract new demand to the region.

New demand
Positioning of the region
A recurring theme in discussions across the region was comment that the region “undersold” itself and had the capacity to perform both socially and economically at a higher level. Barriers to this were seen to be both external (Government policies and initiatives) and internal (being able to work together, selling ourselves well through local and state media, promoting the region as a place to live, thinking and acting strategically, focussing on the future we want to have). The region has great potential and positioning itself as a powerhouse for the state would lead to accelerated opportunities.

Existing Industries
Industry Growth Targets have been set for 2009-2014 for the eight sectors discussed in this report. These targets are based on growth rates over the last ten years, known developments which will affect the industry and qualitative data gathered within the region. The targets are intended to focus supporting action, rather than to accurately define the future. They do show that without additional industry and business activity, the region will continue to grow slowly.
Water
The Limestone Coast region has reliable rainfall and particularly in the lower part of the region, high rainfall compared to other regions of South Australia. Water management and use through a range of irrigation technology is at an advanced level of skill and expertise in water management is both expected, to comply with water regulation and use, and part of the agricultural practices of the region. There are opportunities to further build these capabilities and to target green industries and the greening of existing industries.

Energy
A number of renewable energy projects are either in place, planned and committed or under consideration. These are situated on the coast and lower south east. They include:

- Geothermal projects with a range of companies including Geothermal Resources Ltd (the Crower project), and Panax Geothermal Pty Ltd (the company Hot Dry Rocks is providing consultancy services to Panax Geothermal).
- Wind power projects are already providing power and income in the region, with additional projects being built and planned.
- Wave energy is being investigated for areas off the southern coast of the region.
- Biomass projects using forest residues and seaweed are either in place or at an advanced or conceptual planning stage.

The Climate Institute commissioned McLennan Magasanik Associates (MMA) to assess the potential contribution of renewable energy to regional employment. MMA concluded that South Australia is expected to see renewable energy output grow by over 200% by 2020 and is one of the states to most benefit from renewable energy projects. The report estimated clean energy investment from committed and planned projects in South Australia to be $87 million for biomass, $2,122 million for geothermal and $6,076 million for wind.

This growth would lead to 788 permanent jobs and 3798 peak construction jobs in South Australia. The Limestone Coast is seen as a clean energy ‘hot spot’ and the report anticipates 497 permanent jobs (both existing and new for operation and maintenance), 2,858 peak new construction jobs and new local expenditure of $1,202 million (goods and services, purchase of biomass materials, payments of rent to farmers for wind turbines) in the region. In addition there will be indirect employment opportunities in the manufacturing of equipment and the provision of services and materials, some of which will be within the region.

The renewable energy sector needs to have coordinated across agency support, To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.

Tourism
There was comment from many individuals and groups that the region needed to look at an expanded mix of options for tourists to the region. Gourmet food and wine, five star accommodation and associated conference/events and hospitality services, niche tours (sink holes, diving, wine, gardens, forests, coast line and beaches, 4 wheel drive, surf school, sailing), festivals, cultural tourism,
environmental tourism, geopark (Kanawinka) and Mother MacKillop’s beatification were all seen as opportunities. The general feeling of these comments was the need to better engage the high spending sector of the tourist market.

Food and Beverage
Given the availability of water both through the underground aquifer and rainfall, food and beverage production is seen as an area for expansion. Aquaculture/seafood/marron, specialty field crops, high value irrigated produce, niche crops, dairy, horticulture, gourmet meat and cool climate crops were all suggested. Value adding processes including bottling, contract packaging and distribution and consolidators for marketing produce were seen as important to lift these sectors from “hobby” to a profitable and sustainable business level.

Education
There are opportunities for the Education sector to grow the number of students and the diversity of courses offered in the region. Current activity is focused on attracting international students and students from outside the region, career development for individuals, English language courses and post graduate studies for professionals. Suggestions for other opportunities include brokerage for online and other distance education, research agencies, personal interest and lifestyle learning, recognition of prior learning, recreation as well as employment driven learning, expanded courses for viticulture, agriculture, horticulture, marine science, organic food, aquaculture, engineering, water/irrigation, land management, logistics, environment, business leadership and management, and reskilling for career change. To enable this to happen, excellent linkages between all educational organizations – schools, TAFE/RTO’s/ Universities, will need to be in place. A draft Education sector strategic plan is at the discussion stage, which would facilitate these linkages.

Health
The health sector has experienced strong growth over the last ten years and is predicted to continue this growth. Mount Gambier has been named as one of four regional hospitals in the state, the population profile is aging and expectations around medical care are expanding. Flinders University has a presence within the region as a provider of third year medical student course work and placement. The University of South Australia has a Bachelor of Nursing degree and TafeSA delivers a range of Health related courses, all from Mount Gambier. To build on these initiatives so that they are sustainable and act as an attraction and retention strategy for the health and medical workforce, a research centre for health could be considered.
Existing strategies to support business development
A number of positions within the region currently support business development. These positions exist within Local Government, the Limestone Coast Regional Development Board, State and Federal Government Agencies and the private sector. Enhanced coordination of the services provided and clear entry points for those seeking the services would be beneficial to the region.

Additional strategies to support existing industries
The Workforce Development Plan within this report outlines additional strategies to support existing industry sectors so that their sustainability, innovation and growth can be enhanced. The plan includes eight strategies to enable a match between workforce supply and demand.

Strategies to bring new development to the region
To attract new and emerging development to the region the region needs to pro-actively plan for this to happen. The Population and Promotion section of this report discusses this issue and sets out a marketing plan for the region, which aims to facilitate regional growth.
Conclusion
There are many opportunities available to the region which would build demand and therefore population. The key issue is to decide which ones are most viable for the region and then put concentrated effort into them. The areas outlined seem the most likely to pursue and the workforce development and marketing plan are designed to support.

- Without additional industry and business activity, the region will continue to grow slowly.
- The region has great potential and positioning itself as a powerhouse for the state would lead to accelerated opportunities.
- There are opportunities to further build on capabilities in water management and use and to target green industries and the greening of existing industries.
- The renewable energy sector needs to have coordinated across agency support. To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.
- There is a need to better engage the high spending sector of the tourist market.
- Given the availability of water both through the underground aquifer and rainfall, food and beverage production is seen as an area for expansion. Value adding processes including bottling, contract packaging and distribution and consolidators for marketing produce were seen as important to lift these sectors from “hobby” to a profitable and sustainable business level.
- There are opportunities for the Education sector to grow the number of students and the diversity of courses offered in the region. To enable this to happen, excellent linkages between all educational organizations—schools, TAFE/RTO’s/Universities, will need to be in place. A draft Education sector strategic plan is at the discussion stage, which would facilitate these linkages.
- To build on current learning and skill development initiatives in Health so that they are sustainable and act as an attraction and retention strategy for the health and medical workforce, a research centre for health could be considered.
Workforce Development Plan

GOAL: To develop strategies to match supply and demand for labour in industries in the Limestone Coast.

| Strategy 1: Position the Limestone Coast as a strategic growth region for the state |
|---|---|---|---|
| **Action** | **Desired Outcomes** | **Progress to date** | **Timeline** |
| Establish planning and infrastructure protocols and strategies to influence Government to accelerate the positioning of the Limestone Coast as a key growth region for the state | The Limestone Coast is recognized and delivers as a strategic growth region | | |
| Manage the image of the region through liaison and lobbying with the media and government agencies | The region is positioned as a positive, innovative and prosperous region in which to live, grow and work. | | |

| Strategy 2 Establish systems for workforce supply and demand data collection, monitoring and access – that is, workforce information management, risk assessment of supply and regional monitoring |
|---|---|---|---|
| **Action** | **Desired Outcomes** | **Progress to date** | **Timeline** |
| Establish a regional data warehouse accessible online | Data around workforce development is accessible and regularly updated Data around retention in the region is understood | | July 2009 to June 2010 |
| Publicise this data | Workforce data informs practice | | |
| Establish a process to gather regional data through longitudinal surveys | Regional industry data has currency | | |
| Establish a process to gather data through focus groups and discussions | Regional qualitative data is recognized as valuable and used in forward planning | | |
## Strategy 3 Implement programs to support understanding of workforce development strategies

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop case studies of industry best practice and publicise</td>
<td>Industry has clear examples of tactics and strategies and sees workforce development as part of their business</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Coordinate initiatives to provide one to one support to industry to develop workforce planning strategies.</td>
<td>Industry is supported to strengthen workforce practices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engage key industries in developing a regional industry workforce plan</td>
<td>Key industries in the region have a plan for their future workforce development needs</td>
<td>Initial concept mapping and planning with education sector</td>
<td></td>
</tr>
</tbody>
</table>

## Strategy 4 Support new and emerging industry development

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seek investment and provide support for high value food production in the region, including the development of a dedicated infrastructure and planning document and investigation of packaging and marketing issues</td>
<td>High value food production increases in the region</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Support research and innovation in water use and commercialise these understandings</td>
<td>The region is recognized as an expert in water use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support ongoing investment in the renewable energy sector and investigate the establishment of specialist maintenance facilities for renewable energy needs</td>
<td>Renewable energy provides both peak and ongoing construction and manufacturing jobs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seek investment and provide support for high value and niche tourism enterprises</td>
<td>The region attracts a broader spectrum of tourists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop and implement a strategic plan for growth in the Education sector</td>
<td>The education sector actively plans its workforce needs for local, out of the</td>
<td>Commenced</td>
<td></td>
</tr>
</tbody>
</table>
Develop and implement a strategic plan for growth in the Health sector region and post graduate students

The health sector actively plans its workforce needs around projected regional needs

**Strategy 5 Develop a monitoring and evaluation process to measure progress and success**

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify key data sources to measure growth and processes to publicise these data</td>
<td>Data outlining progress is accessible and publicised</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Establish access to data for key groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publicise data on a regular basis</td>
<td></td>
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</table>

**Strategy 6 Coordinate services that provide facilitation of enterprise development**

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a process to map and publicise enterprise development workshops and training opportunities available in the region. Facilitate partnerships between labour and skills development institutions.</td>
<td>Industry is aware of learning opportunities and has access to them Coordinated approach to enterprise development</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
</tbody>
</table>

**Strategy 7 Promote opportunities for work in the region**

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinate and promote regional vacancies online Develop additional strategies for businesses who have traditionally used only &quot;word of mouth&quot; to fill vacancies</td>
<td>Potential workers know of job opportunities within the region Businesses have increased ability to fill vacancies</td>
<td>In place through Career Development Centre website</td>
<td>July 2009 to June 2010</td>
</tr>
</tbody>
</table>
### Strategy 8 Establish a Governance structure and funding model to ensure implementation of the workforce development plan

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree on the scope of the workforce development plan and processes for implementation</td>
<td>The workforce development plan is implemented</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Advocate for and identify funding opportunities</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

### Stakeholders

| Strategy 1 | | State Government |
| Limestone Coast Regional Development Board | | Federal Government |
| Media | | Limestone Coast Tourism |
| South East Local Government Association | | |
| State Government | | |
| Strategy 2 | | |
| Career Development Centre | | |
| Education and training organizations | | |
| Employment and Skills Formation Committee | | |
| Industry | | |
| Limestone Coast Regional Development Board | | |
| Local Government | | |
| Media | | |
| Regional SASP Committee | | |
| Transition Broker and Trades School | | |
| Strategy 3 | | |
| Career Development Centre | | |
| Industry | | |
| Limestone Coast Regional Development Board | | |
| Local Government | | |
| Regional SASP Committee | | |
| Strategy 4 | | |
| Limestone Coast Regional Development Board | | |
| South East Local Government Association | | |
| Strategy 5 | | |
| Limestone Coast Regional Development Board | | |
| Local Government | | |
| Media | | |
| Regional SASP Committee | | |
| Strategy 6 | | |
| Career Development Centre | | |
| Centrelink | | |
| Employment and recruitment agencies | | |
| Group training Employment | | |
| Job Networks | | |
| Limestone Coast Regional Development Board | | |
| Local Government | | |
| Local Apprenticeship /Traineeship providers | | |
| Regional SASP Committee | | |
| TAFE SA and other RTO’s | | |
| Strategy 7 | | |
| Career Development Centre | | |
| Strategy 8 | | |
| Regional SASP Committee | | |
| Limestone Coast Regional Development Board Local Government | | |
POPULATION AND PROMOTION

Population
The population of the Limestone Coast region has been growing at a rate below the state average, and below the target set to meet South Australia’s Strategic Plan. To enable increased population growth, a number of issues need to have focused attention.

Commitment to population growth
Discussions with groups and individuals show diverse opinion about the need for population growth. Some see population growth as a threat to the way of life they enjoy and to the environmental sustainability of the region and believe the economy of the region does not need more people to be healthy. Others are in favour of what they see as progress, at any cost. Many are somewhere between these extremes. Any intention to increase population needs to be “marketed” to the region in terms of its benefits if it is to succeed. The current residents of the region can be the greatest promoters of the region as a place to live and their active involvement is critical to success.

Definition of the region’s unique benefits
The region is competing on a global level as it seeks new residents. It is well placed to compete favourably in a number of areas as it has benefits that potential residents want. These include water availability and opportunity for business and lifestyle, lifestyle and leisure benefits, safety, cost of living, social, health and education infrastructure. There needs to be an agreed definition of these unique benefits so that the community, (including advisory and information services, the media and employment and training services), becomes part of the strategy for promoting these benefits to potential residents. Mapping the region against other areas and against the benefits we have, would clarify both what we can offer that is unique and who is competing with us. An example shows two attributes that could be mapped. This process could be used to involve community leaders in promoting the region.
**Focusing on the target market**

The region has an aging population and a reliance on agricultural enterprises and the services which support these enterprises. To ensure the growth of the community, we need to identify market segments to target. The market segments which could add value to the region include young couples with and without children, young professionals, business entrepreneurs and investors and business owners seeking to expand or relocate. These people could be from intrastate, interstate or other countries. There needs to be discussion and agreement about the target market and realisation that this may be varied by locality (for example, larger centres may have a stronger focus on young professionals while coastal towns may have a stronger focus on businesses seeking to expand or relocate or on lifestyle change).

**Marketing the region**

The region needs to promote itself so that potential residents within the identified target market see it as an attractive option. The region is aiming to sell itself as a place to live and work. This core product has a number of supporting and facilitating services which add value and facilitate moving to the region.

By posing a number of questions, a marketing action plan can be put together for the region.

**Product:** What could we improve in the region to get people to move to the Limestone Coast?

**Price:** What could we improve to make it cost effective for people to move?

**Promotion:** What needs to be put in place to sell the region? (For example; brochures, web info, dvd’s, fliers, 1800 line, information at events)

**Place, cyber space and time:** Where and when can people access information and services about the region?

**People:** How can we make sure we have influencers and ambassadors for the region? What do we have in place with influencers (media, employment and training agencies, government departments,) and what do we have in place with current residents to promote the region? What do we have in place to support the current population to promote the region?
**Process:** How can we establish processes so that potential and new residents are given access to information and support?

**Physical evidence:** How can we ensure that tangible cues (promotional materials, town entrances and tourist facilities) show case the benefits of the region?

**Brand Awareness:** To what extent do we have a profile in places which potential residents can access?

**Brand Image:** What is the reputation and perception of the region, the image, we are sending out to potential residents?

**Stages to decision making:** How do we ensure that marketing hits these stages that a potential resident may go through?

- **Awareness:** Becomes aware of the region but lacks information. Strategies to support this stage can include regular media coverage outside the region, pamphlets which showcase key benefits.

- **Interest:** Seeks information. Strategies to support this stage can include paper based and internet promotional materials (linked to any site that has Limestone Coast or any major town named, including Wikipedia and local government sites) and promotional information through Rex Airlines.

- **Evaluation:** Considers the region. Strategies to support this stage include facilitating services which can provide information, hospitality, access and consultation services.

- **Trial:** Trials to estimate value. Strategies to support this stage include regional study placement for health and education professionals, using the influence of tourist operators, taxi drivers, fuel outlets, retail sector and accommodation sector, providing hospitality and ensuring individuals have information about living in the region.

- **Adoption:** – moves to the region. Strategies to support this stage include welcoming services as well as the facilitation services outlined earlier.

**Distribution channels:** How will we ensure that we distribute information about the region in a way which reaches the people we want to target?

**Conclusion**

It is recommended that a marketing plan which has broad ownership and is seen by key organizations as part of their work is put into place and progressively updated and extended.
### Marketing Plan

**GOAL:** To facilitate regional growth to reach 66,000 people by 2012 in the Limestone Coast.

#### Strategy 1 Identify strategies to promote the unique benefits of the region for targeted groups.

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop promotional materials to be used in and outside the region, that are available in paper and web based formats</td>
<td>Web based information site in place</td>
<td>Web site materials under construction</td>
<td>March 2009 to August 2009</td>
</tr>
<tr>
<td></td>
<td>Web based site linked to all Limestone Coast web sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of web site hits</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Paper based materials distributed to wide range of organizations both in and outside the region</td>
<td>Paper based materials under production</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Paper based materials distributed to wide range of organizations both in and outside the region</td>
<td>Paper based materials under production</td>
<td></td>
</tr>
</tbody>
</table>

#### Strategy 2 Gain broad community support for regional growth

<table>
<thead>
<tr>
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<th>Desired Outcomes</th>
<th>Progress to date</th>
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</thead>
<tbody>
<tr>
<td>Develop a case for regional growth and present this at key forums and with key organizations and groups</td>
<td>The community has a clear understanding of the benefits of increased population</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td></td>
<td>The community has information and tactics to use in their role to support regional growth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop materials outlining the actions the community can take to encourage regional growth</td>
<td>The community has support to take action and an understanding of progress made</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support the community through provision of promotional materials and updates on progress</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Strategy 3 Implement a promotion strategy for the region

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute promotion materials to key organizations and individuals in and outside the region</td>
<td>Promotional materials are used widely</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Develop a positive relationship with local, state and national media</td>
<td>Media reports positively about the region</td>
<td>Discussions under way</td>
<td></td>
</tr>
<tr>
<td>Develop promotion materials for use on regional airlines</td>
<td>Business travellers have access to information and contacts in the region</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordinate and promote regional vacancies online</td>
<td>Vacancies within the region are known to people inside and outside the region</td>
<td>In place through Career Development Centre website</td>
<td></td>
</tr>
</tbody>
</table>

### Strategy 4 Develop a monitoring and evaluation process to measure progress and success

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify key data sources to measure growth and processes to publicise these data</td>
<td>Data outlining progress is accessible and publicised</td>
<td></td>
<td>July 2009 onwards</td>
</tr>
<tr>
<td>Establish access to data for key groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publicise data on a regular basis</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Strategy 5 Coordinate services that provide facilitation of regional growth

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include information and consultation service providers in promotion materials</td>
<td>Potential residents have clear access to information and consultation services</td>
<td>Under construction</td>
<td>March 2009 to August 2009</td>
</tr>
</tbody>
</table>

### Strategy 6 Capitalise on opportunities for potential residents to trial the Limestone Coast

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure visiting short term students in education, health and other disciplines have access to information, and hospitality</td>
<td>Potential residents who trial the region see it as a positive option</td>
<td>Pilots have taken place successfully</td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Provide key services with information and promotion materials</td>
<td>Key services have tools to promote the region</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide towns within the region with strategies to welcome visitors</td>
<td>Towns in the region reflect a vibrant, growing region</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Strategy 7 Establish a Governance structure and funding model to ensure implementation of the marketing plan

<table>
<thead>
<tr>
<th>Action</th>
<th>Desired Outcomes</th>
<th>Progress to date</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree on the scope of the marketing plan and processes for implementation</td>
<td>The marketing plan is implemented</td>
<td></td>
<td>July 2009 to June 2010</td>
</tr>
<tr>
<td>Advocate for and identify funding opportunities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Stakeholders

<table>
<thead>
<tr>
<th>Strategy 1</th>
<th>Strategy 3</th>
<th>Strategy 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limestone Coast Regional Development Board</td>
<td>Career Development Centre</td>
<td>Limestone Coast Regional Development Board</td>
</tr>
<tr>
<td>South East Local Government Association</td>
<td>Chambers of Commerce</td>
<td>Regional SASP Committee</td>
</tr>
<tr>
<td><strong>Strategy 2</strong></td>
<td>Community groups and service clubs</td>
<td>South East Local Government Association</td>
</tr>
<tr>
<td>Chambers of Commerce</td>
<td>Employment Agencies</td>
<td><strong>Strategy 6</strong></td>
</tr>
<tr>
<td>Community groups and service clubs</td>
<td>Industry</td>
<td>Accommodation sector</td>
</tr>
<tr>
<td>Employment Agencies</td>
<td>Limestone Coast Regional Development Board</td>
<td>Education organisations</td>
</tr>
<tr>
<td><strong>Strategy 2</strong></td>
<td>Local heads of Government departments</td>
<td>Fuel and other retail outlets</td>
</tr>
<tr>
<td>Education and training organizations</td>
<td>Media</td>
<td>Limestone Coast Regional Development Board</td>
</tr>
<tr>
<td>Employment Agencies</td>
<td>Regional SASP Committee</td>
<td>Local progress associations</td>
</tr>
<tr>
<td>Industry</td>
<td>South East Local Government Association</td>
<td>South East Local Government Association</td>
</tr>
<tr>
<td>Limestone Coast Regional Development Board</td>
<td><strong>Strategy 7</strong></td>
<td>Taxi drivers</td>
</tr>
<tr>
<td>Local heads of Government departments</td>
<td>Tourism industry</td>
<td>Tourism operators</td>
</tr>
<tr>
<td>Media</td>
<td>Tourism industry</td>
<td><strong>Strategy 8</strong></td>
</tr>
<tr>
<td>Regional SASP Committee</td>
<td>Young Professionals’ Network</td>
<td>Limestone Coast Regional Development Board</td>
</tr>
<tr>
<td>Schools and other educational organisations</td>
<td>Youth Advisory Committees</td>
<td>Regional SASP Committee</td>
</tr>
<tr>
<td>Schools and other educational organisations</td>
<td></td>
<td>South East Local Government Association</td>
</tr>
<tr>
<td>South East Local Government Association</td>
<td></td>
<td><strong>Strategy 9</strong></td>
</tr>
<tr>
<td>Tourism industry</td>
<td></td>
<td>Accommodation sector</td>
</tr>
<tr>
<td>Tourism industry</td>
<td></td>
<td>Education organisations</td>
</tr>
<tr>
<td>Young Professionals’ Network</td>
<td></td>
<td>Fuel and other retail outlets</td>
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<tr>
<td>Youth Advisory Committees</td>
<td></td>
<td>Limestone Coast Regional Development Board</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Local progress associations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South East Local Government Association</td>
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<td>Taxi drivers</td>
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<tr>
<td></td>
<td></td>
<td>Tourism operators</td>
</tr>
</tbody>
</table>

**Strategy 4**
- Limestone Coast Regional Development Board
- Media
- Regional SASP Committee
- South East Local Government Association

**Strategy 6**
- Accommodation sector
- Education organisations
- Fuel and other retail outlets
- Limestone Coast Regional Development Board
- Local progress associations
- South East Local Government Association
- Taxi drivers
- Tourism operators

**Strategy 7**
- Limestone Coast Regional Development Board
- Regional SASP Committee
- South East Local Government Association
Appendix 1 Focus group questions

General
What do you see as the challenges for our region at the moment?
What are the challenges around workforce?
Where do you think the region will be in terms of industry growth or decline in five year’s time?
How will we get there/ what would make a difference? What would make it difficult?
Where can we diversify and grow?
Where are the gaps in our region?
What are the big opportunities?

Specific industry
What are the challenges for your industry at the moment?
What are the challenges for you currently around workforce?
Where do you think the industry in this region will be in five year’s time?
Where do you want to be in five year’s time?
How will you get there? What would make a difference? What would make it difficult?
Are you looking to diversify and grow? How?
Are there gaps in your industry?
What are the big opportunities for the region?
Appendix 2 Survey questionnaire

**Employer Details**

Employer Name:
Address:
Post Code:
Telephone: Fax:
Mobile: Email:
Website:
Main Contact Person and Title:
Phone: Mobile:
Email:
Other Sites / Locations / Branches:
Is your business growing? If so, at what rate per year?

**Company Details**

**Industry Type (ANZSIC)**

**Agriculture, Forestry and Fishing**
- Horticulture and Fruit Growing
- Grain, Sheep and Beef cattle farming
- Dairy cattle farming
- Forestry and Logging
- Marine Fishing

**Manufacturing**
- Food, Beverage and Tobacco manufacturing
- Wood and paper manufacturing
- Metal product manufacturing
- Machinery and Equipment manufacturing

**Construction**
- General construction (building and non building)
- Construction trade services (site preparation, building structure, installation trade, building completion)
Retail Trade
- Food retail
- Personal and Household Good retailing
- Motor vehicle retailing and services

Accommodation, Cafes and restaurants
- Accommodation
- Pubs, Taverns and Bars
- Cafes and restaurants
- Clubs (hospitality)

Transport and Storage
- Road transport
- Air and space transport
- Services to transport
- Storage

Education
- Preschool education
- School education
- Post school education

Health and Community Services
- Hospitals and nursing homes
- Medical and dental services
- Other health services
- Veterinary services
- Child care services
- Community care services

Number of Staff Currently Employed

Number of Employees (by ANZSCO category)
- Managers
- Professionals
- Technicians and trade Workers
- Community and Personal Service Workers
- Clerical and Administrative Workers
- Sales Workers
- Machinery Operators and Drivers
Labourers

**Staff Turnover Rate**
What is the Main Reason for Staff Turnover?
How do you recruit staff?
How difficult is it for you to fill vacancies?
Which vacancies are hard to fill? (by ANZSCO category)
Do you have promotional information available for people seeking a job with your company?

**Workforce Development**

Please rate your business in the following areas (doing it well, doing it okay, thinking about it, not doing it, need advice, not interested, don’t need it)

**Workforce planning**
- Awareness of workforce challenges in my industry
- Processes in place to collect and keep information on my current workforce
- Predicting my future workforce needs
- Goal setting and strategic planning for workforce needs
- Putting a plan into action for workforce needs

**Attract, recruit and select**
- Business has a good employer brand and reputation
- Job analysis carried out before recruitment
- Job description and selection criteria in place
- Advertisements are appealing and placed in a variety of places
- Job application form in place
- Letter acknowledging application in place
- Letter acknowledging successful and unsuccessful applicants in place
- Interview checklist in place
- Interview record form in place
- Letter of offer in place
- Skilled migration, diverse ages, females considered
Induct, train and develop
- Induction checklist in place and used
- Policy documents in place
- Training needs analysis carried out
- Team training plan in place

Motivate, manage and reward performance
- Strategies in place to motivate and reward employees
- Performance appraisal process in place
- Employee exit checklist in place
- Understanding of performance management

Retain and support
- Workforce turnover measured, costed and causes analysed
- Strategies to encourage workers to stay are in place
- Flexible working arrangements in place
- Programs to support workers in the workplace (diversity, training wellbeing programs)
- Employee attitude survey in place
- Recruitment processes make it clear people of all ages are eligible

Lead and Communicate
- Knowledge of different styles of leadership
- Training needs for my position in place
- Evaluation of own skills as a leader
- Communication within the workplace
References


Department of Education Employment and Workplace Relations. *Australian Jobs 2008*.


EconSearch Pty Ltd. (2005). *Quantifying the Economic Contribution of Regional South Australia*.


