

# JOBS & SKILLS BEGA VALLEY

## LABOUR FORCE CAPABILITIES REPORT & PRACTICAL RESOURCES GUIDE



## ACKNOWLEDGEMENT OF COUNTRY

Bega Valley Shire Council acknowledges the Australian Aboriginal and Torres Strait Islander peoples of this nation. We acknowledge the traditional custodians of the lands and waters of the Bega Valley, the peoples of the Yuin and Monaro Nations.

We pay our respects to ancestors and Elders, past and present. Bega Valley Shire Council is committed to honouring Australian Aboriginal and Torres Strait Islander peoples' unique cultural and spiritual relationships to the land, waters and seas and their rich contribution to society.

[Source: Welcome to Country & Acknowledgement of Country - Creative Spirits, retrieved from <https://www.creativespirits.info/aboriginalculture/spirituality/welcome-to-country-acknowledgement-of-country>]

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# Welcome

Jobs & Skills Bega Valley has high ambitions – a Bega Valley where every member of the community has the opportunity to develop themselves through education and training, and find meaningful, satisfying work that allows them to shine: A goal of a sustainable and inclusive, well-functioning labour market, contributing to a vibrant and resilient economy.

The project, undertaken during late 2019 and early 2020, delivers into your hands key pieces of information infrastructure: A Labour Market Capabilities report providing analysis of our current labour market and an estimate of future labour market needs; and, a Practical Resources guide full of suggestions on activities and ideas, for a range of stakeholders, to help activate our labour market potential. The information explores the labour market of the Bega Valley Shire as a whole, and, as an experiment on what can be learned by

diving deeper into a specific location, the town and surrounds of Eden.

Use the Jobs & Skills Bega Valley report and guide to learn about the Bega Valley more deeply and hear the voices of the people seeking to make this place one where young people, entrepreneurs, businesses big and small, career changers – all people with an interest in the employment future of the Shire – have options for quality employment and training that allows them to reach their jobs potential.

The information, gathered through both traditional research methods and interactive community activities, is designed for you to take as evidence to support decisions and plans that make impact to our labour market. Use the information in your funding and grant applications. Power up existing employment networks to deliver outcomes in new ways. The uses of Jobs & Skills Bega Valley are limitless.

# Thanks and Acknowledgements

Jobs & Skills Bega Valley was initiated, coordinated and part funded by Bega Valley Shire Council, through its Economic Development team. The project received grant funding from the Australian Government through the Regional Employment Trials program.

Council is grateful to have Campbell Page as the project's partnering employment services provider.

The research and reporting you have in your hands, in both the Labour Market

Capabilities report and the Practical Resources guide, is a result of the work of Western Research Institute Ltd (WRI). Many thanks to the team from WRI that got to know the Bega Valley's labour market – our businesses and our communities – more deeply than they knew their own families.

Finally, thank you to all of our Bega Valley community, who came together to share their knowledge, experience and ideas about the jobs we need today and tomorrow, and how we might work together.

# Feedback

Feedback on the publication or how you go on to use the information is welcome.





## SECTION ONE

# Executive Summary



## Background

This Labour Force Capabilities report provides insights and outcomes from a process of consultation and research undertaken to:

1. understand the current occupations, skills and employment environment
2. provide direction that addresses the challenges and works to realise our opportunities to sustain and grow local jobs.

Local jobs, in this report, are defined as full-time equivalent employment within the Bega Valley Shire local government area.

### Black Summer 2019/2020 and COVID-19 impacts

The research that went on to create this report was performed between September and December 2019. The Bega Valley Shire was severely impacted by the unprecedented bushfires of Black Summer 2019/2020. Further, COVID-19 caused increased damage to our local economy and labour market.

It is our belief that this report retains great value and we recognise the uncertainty that both these disasters have created.

This report will serve its purpose of empowering the Shire's labour market by providing Bega Valley-specific information that helps decisions makers understand us, our challenges and our opportunities better.

Critical challenges for the Bega Valley are to retain its workers, train or retrain workers to meet industry need, and encourage new residents to move to the area with meaningful work offerings. Jobs & Skills Bega Valley – Labour Force Capabilities report provides you with the analysis of our future labour force; a vision of the future for our industries; and, the occupations of likely demand to enable all decision makers influencing our jobs future to build a future where we meet these challenges.

**Local jobs**  
refer to  
full time  
equivalent  
positions  
within the  
Bega Valley  
Shire area

## How the information was gathered

The report shares with you information about Bega Valley Shire's labour market at two levels: the Bega Valley Shire as a whole, and the township and surrounds of Eden. This information is the result of an extensive research program designed and delivered by Western Research Institute (WRI). Analysis within the broader regional area – referred to as the Capital Region (see sidebox for explanation) – and regional NSW (the areas of NSW outside of Sydney, Wollongong and Newcastle) is also provided. This allows you to assess the current position of the Bega Valley within its broader regional context.

Analysis of the current local labour force was established by collating 2016 Census data with population, industry and employment projections. This analysis was augmented by local information gathered during an extensive consultation program.

The industry and occupational structure of the Bega Valley Shire's labour force was examined to identify how work is distributed across industry sectors and occupations. The consultation processes identified where there were challenges and opportunities for the recruitment, retention and growth of local jobs.

### Business Survey

WRI's business survey established which occupations are currently challenging to recruit. Respondents also provided the types of jobs they anticipate their businesses will need over the next ten years.

### Jobs projection exercise

An estimate of the jobs impact from two areas for potential and substantial future growth was performed. These two areas for high jobs impact areas were:

- 74 future major commercial construction projects (each valued at \$500,000+) were assessed to establish the jobs these projects will create
- the demand for jobs expected to be created from visitor number increases from cruise ships using the Eden wharf were identified

This allowed us to generate an informed prediction for the Shire's labour force over the next ten years, should these predictions be realised. (See sidebox on Bushfire and COVID-19 impacts.)

To assess how these activities would influence the Shire's industrial base, Council's economic profile model was used <sup>1</sup>. This provided the estimate of jobs created across industry sectors, based on the expenditure levels of the major projects and visitation increases.

WRI also used the outputs of Council's economic profile model to estimate the occupations required to deliver the two impact areas, modelling the distribution of the employment on the existing structure of the Shire's labour force.

### Big Ideas community workshops

WRI facilitated two community workshops to harvest the community's 'Big Ideas'. One workshop examined the challenges and opportunities for the Bega Valley Shire. The second workshop examined the challenges and opportunities for Eden and surrounds.

The **Capital Region** is the Statistical Area 4 as described by the Australian Bureau of Statistics. SA4s are sub-State regions and are a reporting area for the Census. Additionally, SA4s are used in reporting on labour market projections stemming from analysis in the Australian Labour which assists in understanding where people will live and work in the future.

The **jobs projection** was completed prior to the 2019/20 Black Summer bushfire disaster and 2020 COVID-19 impacts.

While the timeline and actual jobs benefit from construction activity and cruise ship visitation may differ from the estimate the message of the projection exercise remains valid – we need to prepare to take advantage of the job opportunities that these activities create.

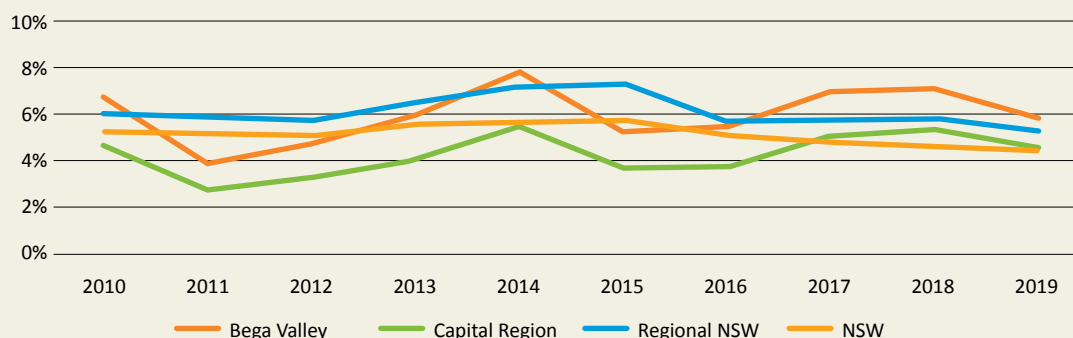
<sup>1</sup> Bega Valley Shire economic profile - <http://economy.id.com.au/bega-valley>.

## Current labour force

The labour force of the Bega Valley Shire was estimated at 10,889 full-time equivalent local jobs in 2018/19<sup>2</sup>.

The September 2019 unemployment rate in the Bega Valley Shire was 5.4%. This was higher than the NSW rate (4.4%), Capital Region<sup>3</sup> (4.2%) and the regional NSW<sup>4</sup> rate (4.7%).

### Unemployment Rate



Sources: Small area labour markets September 2019, NSW Parliamentary website

### Industries of jobs growth

Between 2011 and 2016 Census periods there was jobs growth in the Bega Valley Shire. The following industries increased, as recorded in the level of 2016 jobs with the number and percentage increase on 2011:

- Administrative and Support services – total of 428 jobs, up by 89 jobs (26%)
- Arts and Recreation services – total of 218 jobs, up by 25 jobs (13%)
- Health care and Social assistance – total of 1,895 jobs, up by 187 jobs (11%)
- Agriculture, Forestry and Fishing – total of 924 jobs, up by 66 jobs (8%)
- Information Media and Telecommunications – total of 113 jobs, up by 5 jobs (5%)
- Construction – total of 1,202 jobs, up by 61 jobs (5%)

### Skilled worker occupations

Areas where the Shire had substantial numbers of skilled workers is illustrated by existing high levels of employment in the 2016 Census occupational data, coupled with analysis of occupations that grew substantially between 2011 and 2016 Census periods. These occupations (using ANZSCO descriptions) included:

- **Clerical and Administrative workers** – general administration staff; receptionists; bookkeepers; accounting clerks; information officers; contract program and project administrators; keyboard operators; conveyance and legal executives; human resources clerks.
- **Community and Personal service workers** – bar attendants; baristas; waiters; education aides; café workers; police; aged and disabled carers; child carers; enrolled and mothercraft nurses; dental assistants; welfare support workers; security officers and guards; ambulance officers and paramedics; driving instructors; fitness instructors.

<sup>2</sup> ibid

<sup>3</sup> The Capital Region is the Statistical Area 4 as defined by the Australian Bureau of Statistics (ABS)

<sup>4</sup> Regional NSW refers to NSW excluding Sydney, Wollongong and Newcastle



- **Labourers** – Food and drink factory workers; kitchenhands; housekeepers; livestock farm workers; cleaners; shelf fillers; concreters; metal engineering process workers; handypersons; building and plumbing labourers; freight and furniture handlers; insulation and home improvements installers; forestry and logging works; fencers; abattoir workers; farm staff; cleaners and laundry workers.
- **Machinery operators and Drivers** – truck drivers; delivery drivers; machine operators (not further defined<sup>5</sup>); road and rail drivers; earthmoving plant operators; forklift drivers; paper and wood processing machine operators; bus and coach drivers; agricultural, forestry and horticulture plant operators.
- **Managers** – construction managers; office managers; practice managers; farmers and farm managers; other specialist managers; aquaculture farmers; human resources managers; conference and event organisers; general managers; mixed crop and livestock managers; policy and planning managers; transport services managers; production managers; information technology managers; retail managers; livestock farmers; hotel and motel managers; cafe and restaurant managers; finance managers; crop farmers; other retail, hospitality and services managers.
- **Professionals** – registered nurses; general practitioners and resident medical officers; midwives; social workers; psychologists; dental practitioners; occupational therapists; physiotherapists; surgeons; nurse managers; chiropractors and osteopaths; other natural and physical science professions; management and organisational analysts; software and applications programmers; private tutors and teachers; marine transport professions; industrial, mechanical and production engineers; human resource professionals; architects, designers, planners and surveyors (not further defined); economists; other engineering professionals; primary school teachers; secondary school teachers; accountants; welfare, recreation and community arts workers; early childhood (pre-primary school) teachers; private tutors and teachers; environmental scientists; special education teachers.
- **Sales workers** – sales assistants (general); pharmacy sales assistants; real estate sales agents; retail supervisors; ticket salespersons; checkout operators and office cashiers; motor vehicle and vehicle parts salesperson; sales representatives.
- **Technicians and Trade workers** – chefs; bakers and pastry cooks; carpenters and joiners; motor mechanics; gardeners; greenkeepers; architectural, building and surveying technicians; metal fitters and machinists; structural steel and welding trades workers; animal attendants and trainers; clothing trades workers; chemical, gas, petroleum and power generation plant operators; panel beaters; technical and trades workers (not further defined); civil engineering draftspersons and technicians; air conditioning and refrigeration mechanics; safety inspectors; mechanical engineer draftspersons and technicians; structural steel and welding trades; plumbers; butchers and small goods makers; painting trades workers.

## Occupational skills needed

To provide a more current picture of skills needed in the Shire, the responses from the business survey were used to identify areas where Bega Valley businesses are experiencing difficulties in recruiting suitable staff.

This information identifies that, while the positions listed above from 2016 Census data showed growth or high levels of employment, by 2019 the lack of local job candidates holding the following skills sets or occupations was challenging businesses to successfully recruit these positions. These become potential areas for local skills development.

<sup>5</sup> Not further defined is used by ABS where descriptions don't allow the allocation of data to more specific occupations. It is not possible to allocate this information more specifically.

Businesses identified difficulties recruiting in these occupational groupings:

- **Clerical and Administrative workers** – general administration staff; receptionists; bookkeepers.
- **Community and Personal service workers** – baristas; beauty therapists; tourism guides; accommodation facilities hosts; registered nurses.
- **Labourers** – brick layers; cleaners; concreters; grounds maintenance staff.
- **Machinery operators and Drivers** – licensed drone pilots; drivers (not further defined).
- **Managers** – practice managers; managers (not further defined).
- **Professionals** – educationalists /teachers/ trainers/ facilitators; engineers; experienced mentors; general practitioners; graphic designers; property licensing professionals; software engineers; website designers; professionals (not further defined).
- **Sales workers** – retail sales workers; sales account managers.
- **Technicians and Trades workers** – boilermakers; builders; camera repair/maintenance; cinematographers; cloud technologists; electricians; mechanics; metal trades workers; parts interpreters; quality technicians; radio technicians; trades (not further defined).

A range of generic and soft skills were also identified as being lacking from local candidates:

- People skills
- Reading body language
- Problem solving
- Work ethic
- Computer skills
- Desire to work, including the desire to work full-time
- Willingness to work in the offered locations

## Industries and occupations showing decline

The 2011 and 2016 Census data identified major declines in Bega Valley Shire jobs numbers in the following industries:

- Wholesale trade (241 jobs, down by 34%)
- Transport, Postal and Warehousing (439 jobs, down by 18%)
- Manufacturing (1,060 jobs, down by 13%)
- Electricity, Gas, Water and Waste services (130 jobs, down by 7%)

Existing occupations that had decreased between 2011 and 2016 included:

- **Clerical and Administrative workers** – secretaries (down by 35 positions).
- **Community and Personal service workers** – nursing support and personal care workers (down by 22 positions).
- **Labourers** – commercial cleaners (down by 18 positions); packers (down by 16 positions); paving and surfacing labourers (down by 11 positions); other cleaners (down by 10 positions).
- **Machinery operators and Drivers** – store persons (down by 23 positions); automobile drivers (down by 10 positions).
- **Managers** – livestock farmers (down by 36 positions); manufacturers (down by 17 positions); accommodation and hospitality managers (down by 15 positions).
- **Professionals** – vocational education teachers (down by 28 positions); secondary school teachers (down by 20 positions); training and development professionals (down by 15 positions); counsellors (down by 13 positions); electrical engineers (down by 12 positions); environmental scientists (down by 10 positions).
- **Sales workers** – checkout operators and office cashiers (down by 10 positions).
- **Technicians and Trades workers** – electricians (down by 16 positions); bricklayers and stonemasons (down by 14 positions); electronics trade workers (down by 10 positions).

The logo for 'Future labour force' is located in the top left corner. It consists of a blue square with white curved lines forming a stylized 'F' shape. Below the square, the text 'Future labour force' is written in white.

## Future labour force

To see how the employment base of the Bega Valley Shire might change over the next ten years a profile of our future labour force has been developed. This future profile takes the occupational growth areas from the 2011 and 2016 Census data (outlined above) and the 2016 Census high employment occupations, and adds:

- 2019 information on occupations that businesses identified as areas of future demand (from the business survey), plus
- future jobs projections from the estimated employment impacts of the 74 major projects and the anticipated increase in cruise ship visitor numbers.

### Occupations of future demand identified by local businesses

The following occupations of future demand were identified by Bega Valley Shire businesses:

- **Clerical and Administrative workers** – accounting staff and bookkeepers; general administration staff.
- **Community and Personal service workers** – allied health services - particularly dietitians and diabetic educators; care assistants (certificate qualified); enrolled nurses; massage therapists; nurse practitioners; baristas; beauty therapists; food handling officers; tourism guides; trainers.
- **Labourers** – abattoir workers; cleaners; farm staff; labourers (not further defined).
- **Machinery operators and Drivers** – machinery operators experienced in excavators, dozers, forwarders etc; MC truck licence holders; operations staff (not further defined); transport workers (not further defined).
- **Managers** – building/office managers; business development managers; experienced community managers; search engine optimisation specialists; managers (not further defined).
- **Professionals** – accountants; communications and marketing specialists; design engineers; digital marketing specialists; electronics/control engineers; engineers generally (not further defined); finance professionals; general practitioners; graphic designers; human resources professionals; insurance restoration specific professionals; musicians and musical teachers; paediatricians; systems architects; generalist computer/technology professionals; videographers; web designers.
- **Sales workers** – general sales roles; retail and sales skilled staff; tourism reservation skilled staff. Customer service, stock display and money handling skills were specified as requirements in this broad area of occupations.
- **Technicians and Trades workers** – apprentices (not further defined); auto electricians; boilermakers; builders; carpenter; cloud technicians; commercial cooks; diesel mechanics; cornice and plastering trades workers; equipment maintenance staff; fitters and turners; information technology technicians; mechanics; mechanical maintenance technicians; painters; parts interpreters; trades (not further defined); vehicle air conditioning technicians; veterinary technicians; welders.

See **Skills Mapping and Pathways** later in the report for industry forecasts and predictions on job numbers by occupation.

## Occupations with job increases created by major projects and cruise ship visitor increases

Through the major projects and cruise ship visitation jobs projection (described previously), it is estimated that up to 3,232 local jobs could be created in the Bega Valley Shire across ten years by these two activities, though the timeline and actual jobs numbers may be different due to the impacts of the 2019/20 Black Summer bushfire disaster and 2020 COVID-19 impacts.

The analysis considered the existing, or baseline, level of jobs to identify how many of these positions will be new local jobs and how many will see existing workers engaged in the direct and flow on employment these two activities will create.

Of the 3,232 estimated jobs required to deliver the major projects and service the needs of cruise ship visitors, 64% or 2,079 will be new jobs above the current labour force levels.

Jobs are defined in this report as full-time equivalent (FTE) positions that will be locally available within the Bega Valley Shire in addition to the typical labour force numbers.

The major projects analysis considers how many additional jobs above the typical labour force level are needed to deliver the construction projects. This ensures that the number of new jobs arising from these projects can be estimated.

The analysis of the impact on employment from the increasing cruise ship visitation assumes all jobs estimated to be new as this is additional demand for services in the Shire.

The analysis identified jobs over the next ten years will be concentrated as follows:

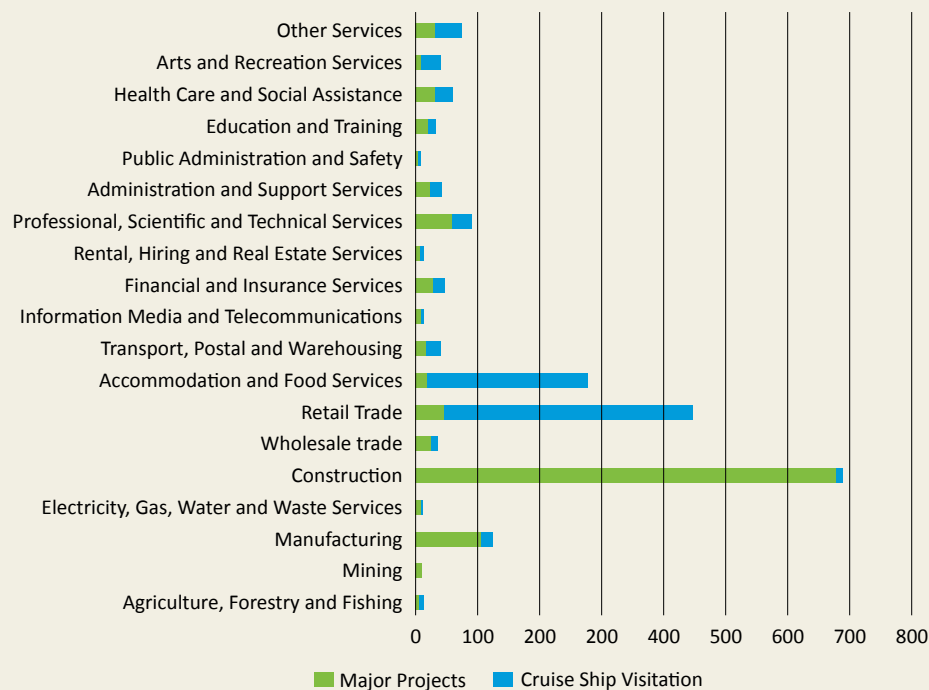
- Major projects will require an estimated 973 direct construction jobs of which 484 will be new jobs above the level typically evident in the Shire's labour force
- Cruise ship increases will require an estimated 642 direct jobs all of which are new, distributed as follows:
  - Retail Trade: 316 jobs
  - Accommodation and Food services: 243 jobs
  - modest increases in Transport, Postal and Warehousing, Information Media and Telecommunications, Professional, Scientific and Technical services, Education and Training, Health care and Social assistance, Arts and Recreation services and Other services.

## Major projects and the expansion of cruise ship visitation

have been estimated to generate 3,232 FTE local jobs located in the Bega Valley Shire.

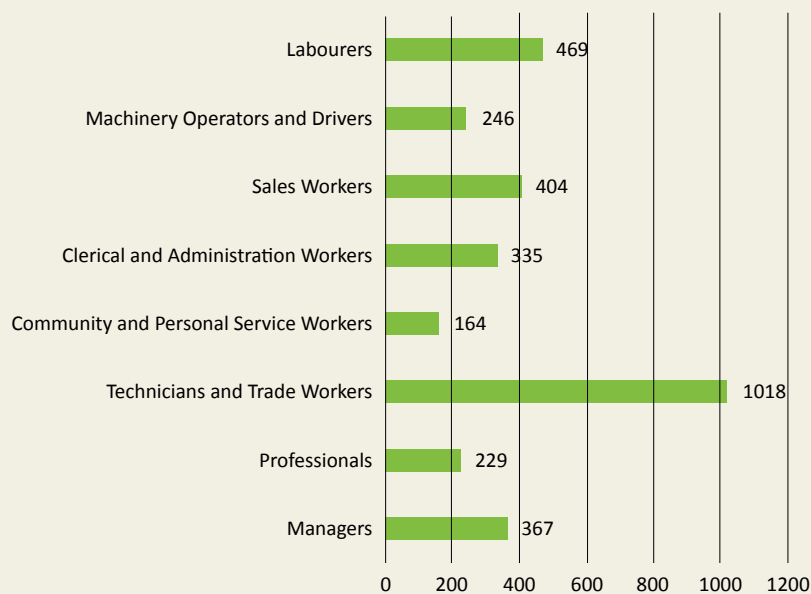
2,079 of the jobs are projected to be new.

### Estimated jobs by industry created in the Bega Valley between 2020 to 2029 as a result of major projects and increased visitor spend (through increased cruise ship visitation)



Sources: WRI analysis using derived estimates from ABS, Bega Valley Shire economic profile model and cruise ship statistics supplied by NSW Port Authority. The estimated occupations where the jobs will be required are shown below.

### Estimated total jobs by occupation group created in the Bega Valley Shire between 2020 to 2029 as a result of major projects and increased cruise ship visitation



Sources: WRI analysis using derived estimates from ABS, Bega Valley Shire economic profile model and cruise ship statistics supplied by NSW Port Authority.

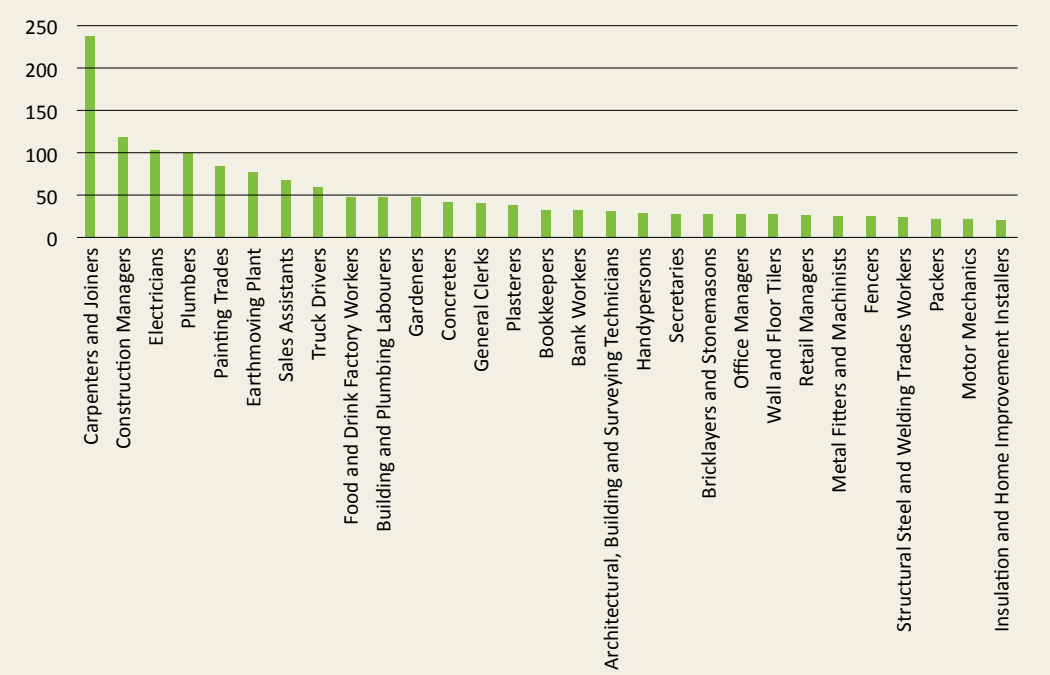


Additional consideration has been given to the projected increase in retail sector jobs in light of structural changes to the sector from the impacts of online services.

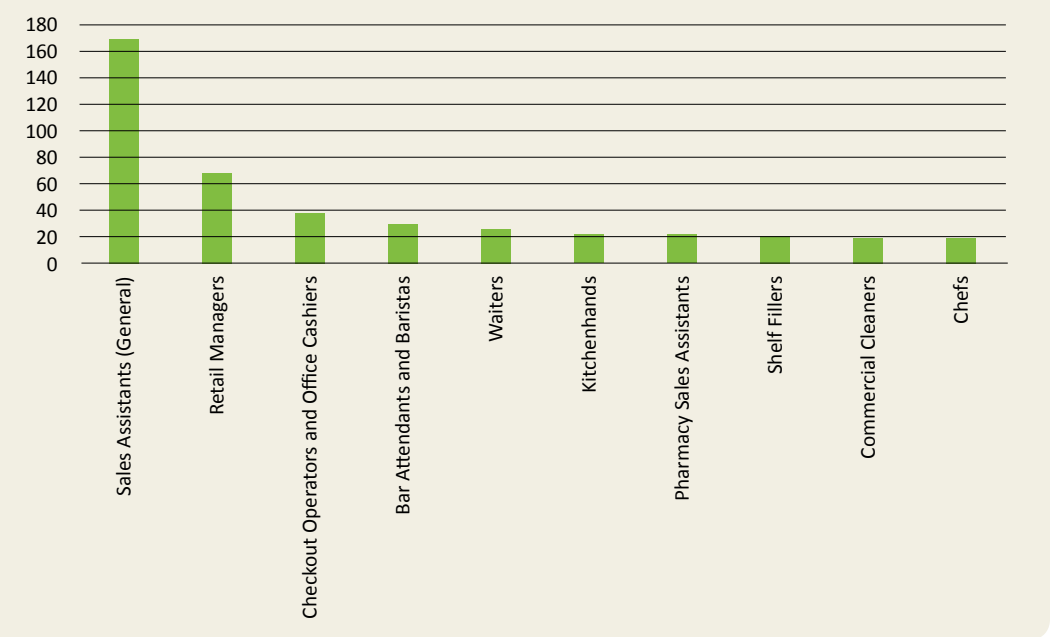
The estimated increase in retail sector jobs is considered reasonable given that the growth is associated with visitors shopping as part of onshore excursions (as in, they have temporarily left their cruise ship) to explore the region. This creates a real opportunity to expand retail shopfront experiences, particularly in Eden, to achieve these estimates.

Occupational sub-groups, where more than 20 positions are needed to deliver the major projects and support the cruise ship visitation estimated job increases, are shown below to highlight the areas of training and skills development needed.

Major Projects Occupations > 20 jobs



Cruise Ship Visitation > 20 jobs





## Key challenges

Key challenges to maintaining and growing the Bega Valley Shire labour force were identified in interviews, the business survey and the two community workshops. These challenges include:

- the lack of suitably qualified local candidates for jobs.
- a perception that there is a) insufficient information for jobseekers and b) a low level of awareness of the services available to assist jobseekers in their job searches. The accuracy of information on the local availability of work provided to school leavers was noted as a related issue.
- retaining workers in their jobs.
- the lack of understanding of the types of jobs that will be required in the future means inadequate skills development is occurring. This impacts on the ability of locals to get jobs as they arise.
- attracting workers and their families to the Shire due to lower wages, availability of jobs for partners and a perception that facilities in the Shire are not sufficiently promoted to attract new residents.
- out migration of young people who are seeking education and career development.
- difficulties accessing training to match skills deficits.
- transport issues negatively affecting the supply of inputs needed by businesses, the distribution and warehousing of products, and the ability of workers to travel to work and training. Distances across the Shire were identified as being a challenge for workers and businesses.
- access to major tourism markets is also impacted by transport infrastructure issues. For example, travel distances to Sydney and Melbourne, and the mountainous route to Canberra. The limited air services were also raised, from passenger numbers and freight perspectives.
- issues relating to societal perceptions were raised, with the identification of location specific high crime rates and levels of drug and alcohol use.
- the seasonality and lack of permanency of work in the tourism sector, as well as lower wages and skills required, are thought to challenge attracting workers to the sector.
- realising the potential and planning the future of the Eden wharf development.

For more details see  
**Economic Conditions** section  
of the Executive Summary.

Full consideration is provided  
in the **Challenges** section later  
in this report.



## Key opportunities

A range of opportunities were identified in the consultation and research processes. Following are the key issues.

### Maximising the unique selling points of the Bega Valley Shire's physical attributes

- The Bega Valley offers an attractive lifestyle with an extensive coastline and numerous picturesque locations to migrate to.
- The area is pristine with over 100 beaches and numerous environmental features including estuaries, lakes, National/State parks, State forests and Crown land.
- Promotion of the unique physical attributes could be included in marketing materials to attract new residents. Additionally, promotion could include the lower cost of living compared to major urban centres.

### Opportunities for Indigenous employment

A range of ideas were collected, including:

- free oyster leases on Wallaga Lake.
- ensuring contracts include a requirement for identified Indigenous jobs and that there is monitoring by government to ensure compliance.
- improvements in the engagement with Indigenous communities.
- a skills audit of the Wallaga Lake community to identify specific training requirements and the funding of a community coordinator position.
- the need for a whole of community forum to identify specific Indigenous job opportunities and training needs.

### Industries identified as having the greatest potential

#### Tourism

- Particular focus needed to realise the potential of the Eden port and related skills development opportunities for local jobseekers.
- Maximising the appeal of the Shire's natural attributes through new initiatives such as creating/extending/building on cycling-related activities, festivals and whaling history, along with growth in food products.

#### Health care and Social assistance

- Job increases are expected due to the sector's growth. As a highly competitive sector in terms of recruitment, to attract new residents a marketing initiative, highlighting attractions across the range of features the Bega Valley Shire has to offer, could allow the opportunity to be realised.
- South East Regional Hospital (SERH) is modern, well equipped and the largest hospital in the south east of NSW. Coupled with the region's attractive lifestyle, SERH may assist in attracting highly sought-after health sector staff. Development of teaching and research services was identified.

#### Telecommunications sector

- Identifying the infrastructure on offer, plus the lifestyle choices of the Bega Valley.

For more details see **Economic Conditions** section of the Executive Summary.

Full consideration is provided in the **Opportunities** section later in this report.

See the companion **Practical Resources report** for ideas that explore these opportunities.

## **Agriculture**

- Identification and promotion of an agritourism sector was noted as an opportunity for exploration. Agritourism takes advantage of two areas of the Bega Valley’s comparative advantage – tourism and agriculture. Value adding to existing sectors is a highly effective approach for jobs retention/creation realisation.
- Enhanced integration of the agriculture and telecommunications sectors to offer best practice and innovative farming solutions.

## **Forestry**

- Processing logs locally instead of sending offshore.

## **Transport**

- Multiple references to deficiencies in transport infrastructure and the impact on accessing jobs and training suggests a need for further investigation.
- Expansion of Merimbula airport offers opportunities to expand services to the region.
- Eden wharf development offers significant point of difference opportunities. Freight volume increases are possible and the concept of exploring Eden as a special activation precinct under the NSW Government’s program was identified.

## **Innovation and Entrepreneurialism**

- Given the current and future skills needs that have been identified in the Information Computer Technology sector (in both direct technology jobs and associated marketing jobs like digital marketing officers) an option of establishing a fee-for-service consultancy could be explored.
- Explore funding options, from both the private and government sectors, to promote new innovative sectors/businesses, and research and development opportunities.
- Encourage collaboration between those seeking funding to create new technology or entrepreneurial initiatives, utilise mentoring and develop the burgeoning information computing and technology industry.
- Collaboration between the three tiers of government to support innovative business development, and research and development opportunities. Incentivisation programs were suggested to encourage jobs in innovative industries. Incentivisation of areas identified in the future need’s analysis such as digital marketing officers, web designers, graphic artists, software engineers and communications and marketing professional who specialise in digital environment, is an immediate need.

## **Education**

- Grow the Bega Valley Innovation Hub services to encourage new innovative industries, particularly relating to new/digital business models.
- Increase engagement across the tiers of education. Equip students with soft skills, in addition to vocational skills, to improve readiness for work.

## **Non-industry initiatives to enhance potential**

- Cross collaboration on jobs initiatives – three tiers of government, businesses and community groups working together on the same programs to develop jobs in the Bega Valley Shire.
- Jobs growth opportunities – continue to develop a better understanding of what likely job demands are and tailor training initiatives so that locals can compete for jobs.

## Existing areas of strength in the Bega Valley Shire economy

A key strength of the Bega Valley Shire is its broad economic base, with jobs distributed across a number of industries.

Analysis of the structure of the Shire's economy identified areas of comparative advantage (see Appendix 2 for details – available from Bega Valley Shire Council's website). These advantages exist where the region has strengths when compared to other locations. Our industries currently showing comparative advantage:

- Agriculture, Forestry and Fishing
- Electricity, Gas, Water and Waste services
- Accommodation and Food services (which includes much of the tourism sector activities)

Programs to maximise the benefits from comparative advantage, by supporting and growing these industries, have a strong likelihood of success.

The estimated additional local jobs modelled in this report from the 74 major projects over \$500,000 and the increase in cruise ship visitation would expand existing comparative advantage and strengthen the region's resilience.

Using focused growth optimisation actions such as those described in the accompanying Jobs & Skills Bega Valley – Practical Resources guide, industries that are close to offering comparative advantage could be grown to extend the area of comparative advantage. Currently, these industries are close to having comparative advantage:

- Manufacturing
- Health care and Social assistance
- Other services (see next page: 'Other services' is Division S in the Australian Bureau of Statistics Australian and New Zealand Standard Industrial Classification<sup>6</sup>). Other services have a comparative advantage in the Eden area, but this advantage doesn't extend across the whole of the Bega Valley Shire.

### Advice when looking to build on comparative advantages

When exploring how to take advantage of areas of comparative strength, structural changes that have occurred, or are expected to occur, within the industries identified should also be considered. This is because the analysis is based on the most recent data from the 2016 Census.

Local knowledge of issues, such as the recent changes to the dairy, forestry and fishing industries, and jobs losses in manufacturing, will have influenced the results when data from the next Census is analysed.

However, this current analysis is useful to contextualise how the Bega Valley Shire compares with other locations in terms of its industry structure. Additionally, the region will retain natural advantages in sectors where there are unique features. For example, Eden Wharf, being one of a limited number of ports in New South Wales outside Sydney with the ability to dock large cruise ships, and the existence of a major employer like Bega Cheese that has the largest market share of the national cheese market.

<sup>6</sup> Source: Australian Bureau of Statistics, 1292.0 - Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 1.0), Accessed April 2020



## Australian and New Zealand Standard Industrial Classification (ANZIC)

### DIVISION S: OTHER SERVICES (ABS)

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

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

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



## Our business diversity is a strength

The consultation processes identified challenges and opportunities, as well as business conditions, in the Bega Valley Shire. Information collected from locals was supplemented with data from a range of sources to test the suggestions made and to identify further challenges and opportunities.

Consideration of local business conditions, via an online survey, identified a significant level of local sourcing of business inputs and a strong local market where goods and services are sold. This is a positive and illustrates a reasonably high level of self-sufficiency within the Shire.

Ensuring business conditions are understood and how current issues are impacting them are important. Regular monitoring of the health and ability of the Shire's business community is recommended, as well as checking in on business intentions regarding retaining local jobs.

The existing collaborations across the business community and with the three tiers of government could be enhanced to ensure business decisions that impact employment levels are understood.

# Economic profile summary

This section of the Executive Summary provides a summary of the economic profile which is provided in full in Appendix 1 (available from Bega Valley Shire Council's website).



## Population

### Summary

- The Shire's population is predicted to grow to 36,750 persons by 2036<sup>7</sup>.
- The population is aging – just like other regional areas – and this will continue as the local baby boomer cohort ages and the Shire continues to be a destination for semi or full retirement relocatees.
- The 65+ years cohort of the Bega Valley Shire population is projected to increase from 24.6% in 2016 to 35.6% in 2036. Regional NSW (NSW excluding Sydney, Wollongong and Newcastle) was 20% in 2016 rising to 27% in 2036<sup>8</sup>.
- The Aboriginal and Torres Strait Islander population in the Shire in 2016 was 3.1% compared to 2.9% in NSW. 7% of Eden's population identified as Aboriginal or Torres Strait Islander peoples in 2016<sup>9</sup>.
- 56% of the Shire's Aboriginal and Torres Strait Islander population is under 25 years of age compared to 53.5% in NSW<sup>10</sup>.
- Significant numbers of the 15-24 year olds are leaving the region annually.
- Out migration of young people is a significant issue for building the future labour force.



## Labour force

### Fully employed workers are:

- those who are in full-time jobs (of 35 hours or more) and who worked their regular full-time hours in any given week, or
- those in part time jobs who worked their regular number of part-time hours in any given week.

### Underemployed workers:

- are part-time or full-time workers who did not work their regular hours and who would prefer to have worked their regular hours in any given week.

Regions with a high part-time workforce, such as is seen in the Bega Valley Shire, often have a higher level of underemployment.

### Disengaged people:

- are those who did not have any employment, did not look for work and were not in training in any given week.

Persons who are retired would be considered to be disengaged from the labour force, but disengagement is a particular issue in younger age groups.

<sup>7</sup> NSW Department of Planning and Environment - NSW and Local Government Area population projections, 2016.  
Note: These were the population projections published when the modelling was completed. The NSW Government published updated population projections after the analysis in this report had been completed that revised population down slightly in 2036.

<sup>8</sup> ibid

<sup>9</sup> ABS 2016 Census

<sup>10</sup> ibid

## Summary

- The labour force (15-64 years) in the Shire is diminishing. Estimated at 59% in 2016, it is projected to fall to 50% by 2036. This is notably lower than the future predicted labour force in regional NSW (NSW excluding Newcastle, Wollongong and Sydney) which is estimated to reduce from 61% in 2016 to 56% in 2036<sup>11</sup>.
- The 65+ years cohort of the Bega Valley Shire population is estimated to increase from 24.6% in 2016 to 35.6% in 2036. For regional NSW this cohort rises from 20% in 2016 to 27% in 2036<sup>12</sup>.
- The September 2019 unemployment figure for the Shire was 5.4% (a decline on the previous year at 6.8%) but it is higher than regional NSW area (4.7%) and NSW (4.6%)<sup>13</sup>.
- The September 2019 unemployment rate for Eden was 8.1%<sup>14</sup>.
- Employment is spread across a diverse range of industries in the Shire. This offers resilience in times of change within particular sectors. This resilience is based on the Shire's comparative advantages across a number of industry sectors.
- There is a high proportion of people aged 55+ years in the workforce and this age group dominates the managers occupation group.
- The high proportion of part-time or casual jobs was identified as a challenge. For example, 63% of those employed in both Community and Personal services jobs and as Sales workers are in part-time work.
- The unemployment rate of Eden's young people (15-24 years) in 2016 was 17% – higher than NSW (13.6%) and regional NSW (14.3%). The Bega Valley Shire overall figure for this age group was 11%<sup>15</sup>.
- 2016 unemployment rates for Aboriginal and Torres Strait Islander peoples in the Shire (16.5%) and Eden (18%) were higher than NSW (15%)<sup>16</sup>.
- Workforce participation rates of the young (15-24 years) are lower than for other working age ranges<sup>17</sup>.



## Industry

### Summary

- The value the Shire adds to the NSW economy has been static for some years. In 2018-19, the Bega Valley Shire Gross Regional Product (GRP) was \$1.490 billion which was a small reduction on the previous 5 years<sup>18</sup>.
- The Shire's industry base is diverse across industries and occupations, which forms a solid basis for ongoing economic health and resilience.
- The industries where the Shire is strong are challenged by structural issues and climatic conditions, particularly for Agriculture, Forestry and Fishing.

11 NSW Department of Planning and Environment – NSW and Local Government Area population projections, 2016.

12 ibid

13 ABS Labour Force survey

14 SA2 Data tables - Small Area Labour Markets - December quarter 2019

15 ABS Census 2016

16 ibid

17 ibid

18 Bega Valley Economic profile

19 The Accommodation and Food services industry includes most of the tourism sector. The tourism sector is not individually reported in ABS data. See appendix 2 (available from Bega Valley Shire Council's website) for the analysis to establish the comparative advantage industries.

- Current industry profile strengths exist, offering comparative advantage in: Agriculture, Forestry and Fishing; Electricity, Gas, Water and Waste services; and, Accommodation and Food services<sup>19</sup>.
- In Eden, the existing industries showing comparative advantage are: Agriculture, Forestry and Fishing; Accommodation and Food services; and, Other services.
- Based on the current concentration of employment by industry, using a location quotient analysis, there are a number of industries that could attain the level of comparative advantage with reasonably small increases in employment.

These industries include: Manufacturing; and, Health care and Social assistance. Health care and Social assistance is forecast for strong future growth across the nation as Australia's population ages.

Building this part of the economy would require promotions that successfully attract workers who will be in high demand in all locations in Australia.

- Transport and accessing the geographic extremes of the Shire were cited as significant issues for the growth of industries.
- Realisation of the potential of the Eden wharf development requires long-term planning.
- Local businesses were found to both buy and sell products mostly into the local area. This is a strength, offering resilience and self-sufficiency. However, it is also a challenge for achieving expansion into markets outside the Bega Valley Shire.



## Education

### Summary

- There are lower rates of postgraduate qualifications in the Shire than other regional areas.
- Higher numbers of Certificate III and Certificate IV qualifications are held than in other areas.
- The number of educators in the Shire has decreased.
- Businesses suggest local job applicant skills are often insufficient to result in successful job applications.
- Job applicant soft skills (including people skills, problem solving, communications, work ethic, computer skills and willingness to work across jobs and locations) is a potential area for skills development.
- Access to training facilities is challenging due to the size of the Shire, particularly noted as issues for Merimbula and Eden.
- Courses need to be tailored to the skills needed for future jobs to make local jobseekers job ready.
- Better awareness of future jobs and skills needs will improve local jobseekers' success when applying for work.
- Information on the availability and variety of local work and future opportunities would encourage more people to stay in the region.
- Targeted campaigns to promote the Shire, particularly to attract new residents in high demand occupations where the region will have to compete with other locations, are needed.

<sup>19</sup> The Accommodation and Food services industry includes most of the tourism sector. The tourism sector is not individually reported in ABS data. See appendix 2 (available from Bega Valley Shire Council's website) for the analysis to establish the comparative advantage industries.





## Interdependencies between businesses

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Findings from the online survey of Bega Valley businesses are summarised below. See Appendix 3 (available from Bega Valley Shire Council's website) for full survey details.

### Summary of business survey data

- Bega Valley Shire businesses have a high level of interaction between themselves. 45.6% of businesses buy their products within the Shire.
- The high dependence on major employer Bega Cheese is a risk to the region, should it reduce job numbers.
- Major supply chains are based in Bega, Merimbula, Pambula and Eden.
- 51% of the top 3 products businesses purchase are sourced within the Shire, indicating local businesses are reliant on local suppliers. The main products purchased by business:
  - Food products
  - Services (with concentration on marketing, accounting and insurance)
  - Consumables (broad range of products but multiple examples of medical and cleaning products)
  - Machinery and hardware (broad range of products with moderate level of concentration on computer hardware)
  - Office equipment
- 57% of all goods sold by local businesses are to customers in the Shire. Of the top 3 products sold, 67% are bought by locals. The next highest sales area is to NSW. The main products sold, identified by the business survey respondents:
  - Tourism related services (tourism products, art supplies and artworks)
  - Food and beverage products
  - Retail products
- Opportunities for enhanced collaboration between businesses was noted in a variety of areas including: collective purchasing, grant applications, businesses up and down supply chains working together, and joint promotional campaigns.
- Transport (access and costs) and connectivity issues were identified as challenges for business development.

# Methodology

## Consultation processes

167 people participated in the consultation processes that underpin the Jobs & Skills Bega Valley – Labour Force Capabilities report. This, combined with additional desktop research, provided a list of challenges and opportunities to assist in developing the current and future labour force in the Bega Valley Shire area.

## Economic profile

To paint a picture of the Bega Valley Shire a profile of its key socio-economic elements was completed.

## Current and future labour force assessment

### Baseline labour market analysis

Bega Valley Shire's labour force conditions were identified using Census data from 2011 and 2016. This enabled changes across industries and occupations to be mapped.

The largest employing occupational groupings were identified, to understand the areas of the labour force that are significant.

An online survey of business was used to identify 1) current issues in recruiting and 2) the future employment opportunities local businesses predict they will offer.

Future demand across industry sectors and occupations, and the necessary pathways to education and collaboration, were identified to provide a pathway for filling vacancies with local people and for building a sustainable economy in the Bega Valley Shire.

Industry trends and future occupational predictions were assessed to consider the implications external factors may have on the local labour force.

## Impact of major projects and increases in cruise ship visitation

Following the identification of a baseline of the labour force from Census data, survey responses and desktop research (described above), the impact on the number of local jobs (full-time equivalents) from 74 major projects (non-residential construction valued at over \$500,000 per project) was estimated.

The 74 major projects identified have a total estimated value of \$376,887,063. (See sidebox for Black Summer and COVID-19 issues.)

Major projects were identified from a variety of sources including Council's approved development applications, consultation with stakeholders, state and federal government, Council staff, community members and in interviews with industry.

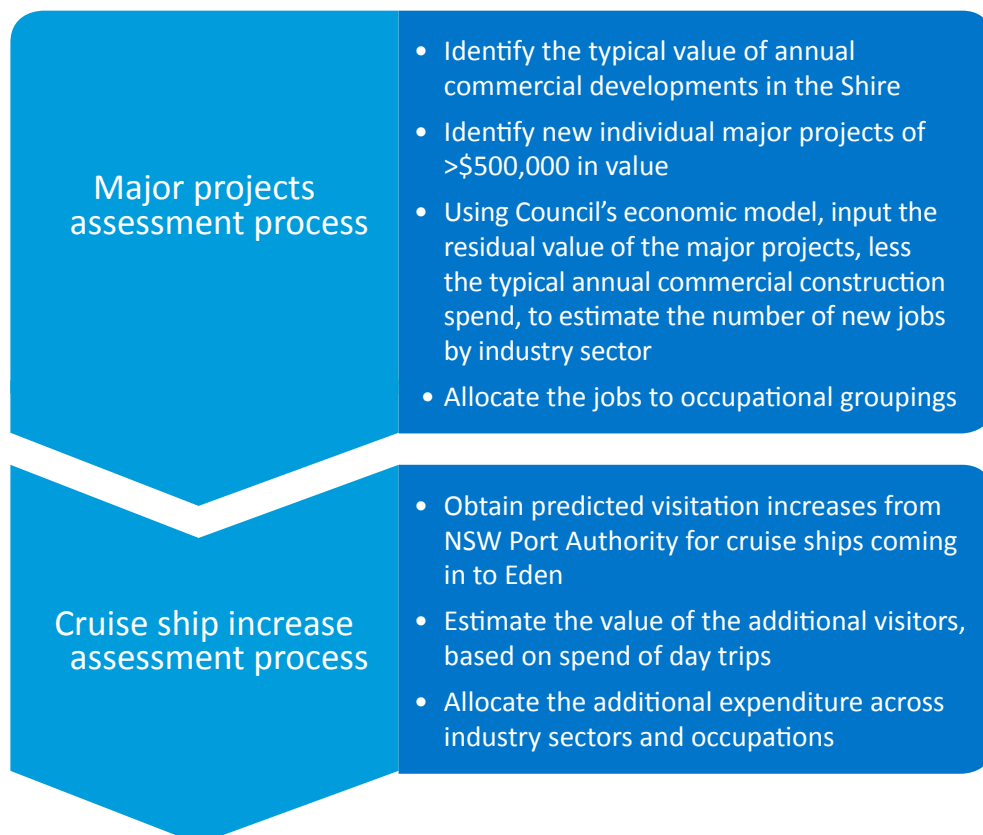
Anticipated increases in cruise ship visitation, provided by NSW Port Authority, were extrapolated to estimate the associated increased level of economic activity and impact on local jobs over the next ten years.

Bega Valley Shire Council's economic modelling tool Profile.id, provided by id Consulting, was used to estimate the number of jobs to be created in the Shire by these two activities based on their financial value.

The jobs projection was completed prior to the 2019/20 Black Summer bushfire disaster and 2020 COVID-19 impacts.

While the timeline and actual jobs benefit from construction activity and cruise ship visitation may differ from the estimate the message of the projection exercise remains valid – we need to prepare to take advantage of the job opportunities that these activities create.

### To estimate the number of new jobs:





# SECTION TWO

# Main Report

# Introduction

An understanding of the Bega Valley Shire labour market and impacting conditions was the key ambition of the research undertaken to prepare the Jobs & Skills Bega Valley – Labour Force Capabilities report.

Bega Valley Shire Council was interested in an analysis that enabled an assessment of the performance of the Shire's labour market as a whole. Additionally, given the unique characteristics in Eden, this locality was also investigated and reported upon.

The steps used to capture the current and future capabilities for the Bega Valley Shire labour force included the following:

## Desktop research

Drawing on existing data sources supplied by Council and obtained from primary data sources such as the Australian Bureau of Statistics (ABS) and secondary data sources including the National Institute of Economic and Industry Research (NIEIR), NSW Port Authority, Council's economic profile tool provided by id Consulting, IBISWorld and others.

## Consultation and online business survey

167 people participated in the consultation processes in two interactive workshops held in Bega and Eden, 38 interviews and 77 businesses who responded to the online business survey.

Council and other government officials, including NSW Port Authority, were interviewed to gather details, particularly relating to the major projects and cruise ship impacts.

## Analysis and preparation of the draft reports

Data drawn from the range of sources was assessed.

Western Research Institute – the project's consultants – developed a methodology to estimate future job demand based on current labour force levels, augmented with the likely demand from major projects and the impact of the expanding visitor economy as Eden wharf opportunities are realised.

Draft reports were reviewed by Council and comments considered in order to finalise the reports.

Desktop research

Community consultation  
via workshops,  
stakeholder interviews  
and online business  
survey

Labour Force Capabilities  
report – containing  
analysis on consultation  
and desktop research,  
and challenges  
and opportunities  
identification

Practical Resources  
Guide – the plan  
showing activities to  
pursue opportunities



# Bega Valley Shire Economic Profile

This section provides an overview of the Bega Valley Shire key socio-economic, industry and business characteristics. Refer to Appendix 1 for details (available from Bega Valley Shire Council's website).

## Population projections and impact on labour force

### Key Points

- There is a higher concentration of people aged 65+ years in the Bega Valley Shire compared to regional NSW.
- The labour force is expected to decline over the next decade.
- There is a significant out migration of younger residents.

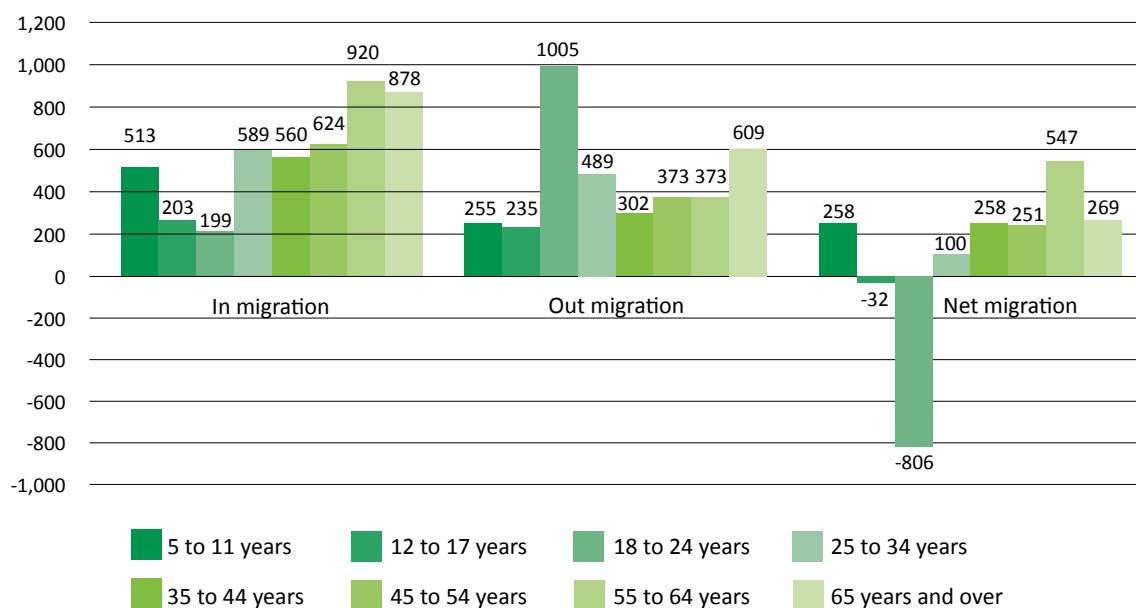
2018 Estimated Residential Population	34,348 persons <sup>20</sup>
2036 estimated population	36,750 persons <sup>21</sup>
Compound annual growth rate	0.4%
Aging population	<p>65+ years age cohort is projected to grow from 8,350 in 2016 to 13,100 persons in 2036 to represent 35.6% of the population.</p> <p>The regional NSW 65+ age cohort is projected to make up 27% of the regional NSW population by 2036<sup>22</sup>.</p>

<sup>20</sup> ABS 2018 Estimated Residential Population

<sup>21</sup> NSW Department Planning and Environment, NSW and Local Government population projections, 2016

<sup>22</sup> Ibid

## Bega Valley Shire migration between 2011 and 2016



Source: Bega Valley Shire economic profile

The graph shows net migration movements across age groups from Census 2011 to Census 2016. The data supports the sentiment raised in the consultation that younger members of the population are leaving the Bega Valley Shire.

## Aboriginal and Torres Strait Islander population

Identified as Aboriginal or Torres Strait Islander	In the 2016 Census 3.1% of the Bega Valley Shire population identified as Aboriginal or Torres Strait Islander compared to 2.9% of the NSW population <sup>23</sup> . 7% of the population in Eden identified as Aboriginal or Torres Strait Islander <sup>24</sup> .
Age groups	56% of the Bega Valley Shire Aboriginal and Torres Strait Islander population, in 2016, were aged under 25 years (compared to 53.5% in NSW in these age brackets). 54% of the Eden Aboriginal and Torres Strait Islander population, in 2016, were under 25 years <sup>25</sup> .
Participation rates	Participation rates for Aboriginal and Torres Strait Islander persons, in 2016, were significantly lower in the Bega Valley Shire (and in Eden) compared to NSW.
Education	Education levels in the Aboriginal and Torres Strait Islander population in the Bega Valley Shire (and in Eden) are lower than levels recorded in the 2016 Census for the Capital Region Statistical Area 4 (SA4) <sup>26</sup> , regional NSW <sup>27</sup> and NSW as a whole <sup>28</sup> .

<sup>23</sup> ABS 2016 Census

<sup>24</sup> ibid

<sup>25</sup> ibid

<sup>26</sup> The Capital Region is the Statistical Area 4 as defined by the Australian Bureau of Statistics. The area includes the local government areas of Bega Valley, Eurobodalla, Goulburn Mulwaree, Hilltops, Queanbeyan-Palerang, Snowy Monaro, Upper Lachlan and Yass.

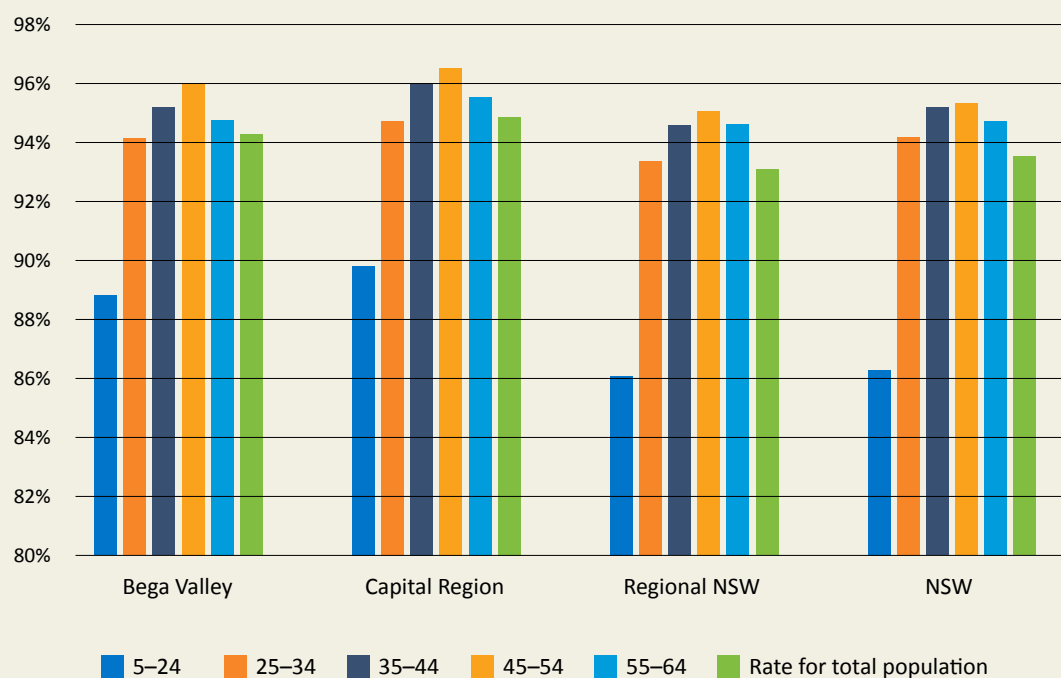
<sup>27</sup> Regional NSW is defined as NSW excluding Sydney, Newcastle and Wollongong

<sup>28</sup> ibid

## Labour force

Decreasing labour force population (15-64 years)	<p>The labour force was 59% in 2016 and is projected to decrease to 50% in 2036. This is notably lower than the future predicted labour force in regional NSW which is estimated to reduce from 61% in 2016 to 56% in 2036<sup>29</sup>.</p> <p>The 65+ years age cohort of the Bega Valley Shire population is estimated to be increasing from 24.6% in 2016 to 35.6% in 2036. Regional NSW change in this cohort is identified as being 20% in 2016 rising to 27% in 2036<sup>30</sup>.</p>
High unemployment rate <sup>31</sup>	<p>In September 2019, the unemployment rate in the Bega Valley Shire LGA was 5.4% compared to 4.9% in regional NSW and 4.5% for NSW.</p> <p>The Bega Valley Shire unemployment rate in September 2019 was lower than the same quarter in the past 3 years.</p>
Employment of people by age	<p>Employment for 15-24 year olds is lower than other age cohorts in the Shire, reflecting the pattern in the other geographic areas shown in the graph below.</p> <p>Relative to the other locations analysed, the 45-54 age cohort showed stronger employment compared to other regional NSW locations overall, although slightly lower than the Capital Region.</p>

### Employment rate by age cohort



Source: ABS 2016 Census

<sup>31</sup> NSW Department of Planning and Environment – NSW and Local Government Area population projections, 2016

<sup>30</sup> ibid

<sup>31</sup> Small Area Labour Markets, September 2019

## Bega Valley Shire level of disadvantage

Socio-Economic Indexes for Areas (SEIFA) is a metric developed by the Australian Bureau of Statistics (ABS) that measures socio-economic disadvantage of a region based on Census data. ABS broadly define relative socio-economic advantage and disadvantage in terms of people's access to material and social resources, and their ability to participate in society. The indexes are a weighted combination of Census variables.

Economic disadvantage is expressed as a numerical score where the mean is equal to 1,000. SEIFA is available at the Statistical Area Level 2 (SA2)<sup>32</sup> and Local Government Area (LGA). Regions are scored and ranked.

SEIFA rankings for economic disadvantage for Eden SA2 and the Bega Valley Shire LGA are displayed in the table below, based on the 2011 and 2016 Census results. Note there were local government amalgamations in areas outside Bega Valley Shire LGA that altered the number of council areas between the Census periods.

	<b>2016 SEIFA NSW Ranking</b>	<b>Total number of areas in the 2016 SEIFA rankings</b>	<b>2011 SEIFA Ranking</b>	<b>Total number of areas in the 2011 SEIFA rankings</b>	<b>Change in ranking</b>
EDEN	68	558	23	521	45
BEGA VALLEY	72	130	71	153	1

The Bega Valley Shire was ranked 72nd out of 130 Local Government Areas in 2016, meaning it was the 72nd most economically disadvantaged Local Government Area in NSW (and more advantaged than 55% of LGAs in the state). This ranking has remained stable since 2011.

Eden was ranked 68th out of 558 SA2 regions in 2016, meaning it was the 68th most economically disadvantaged SA2 region. This ranking is an improvement by 45 places compared to Eden's 2011 ranking of 23rd, suggesting economic conditions in Eden have improved between 2011 and 2016. Nevertheless, Eden remains one of the most relatively disadvantaged SA2 areas in New South Wales with its population on average being more disadvantaged than 87% of SA2s in the state.

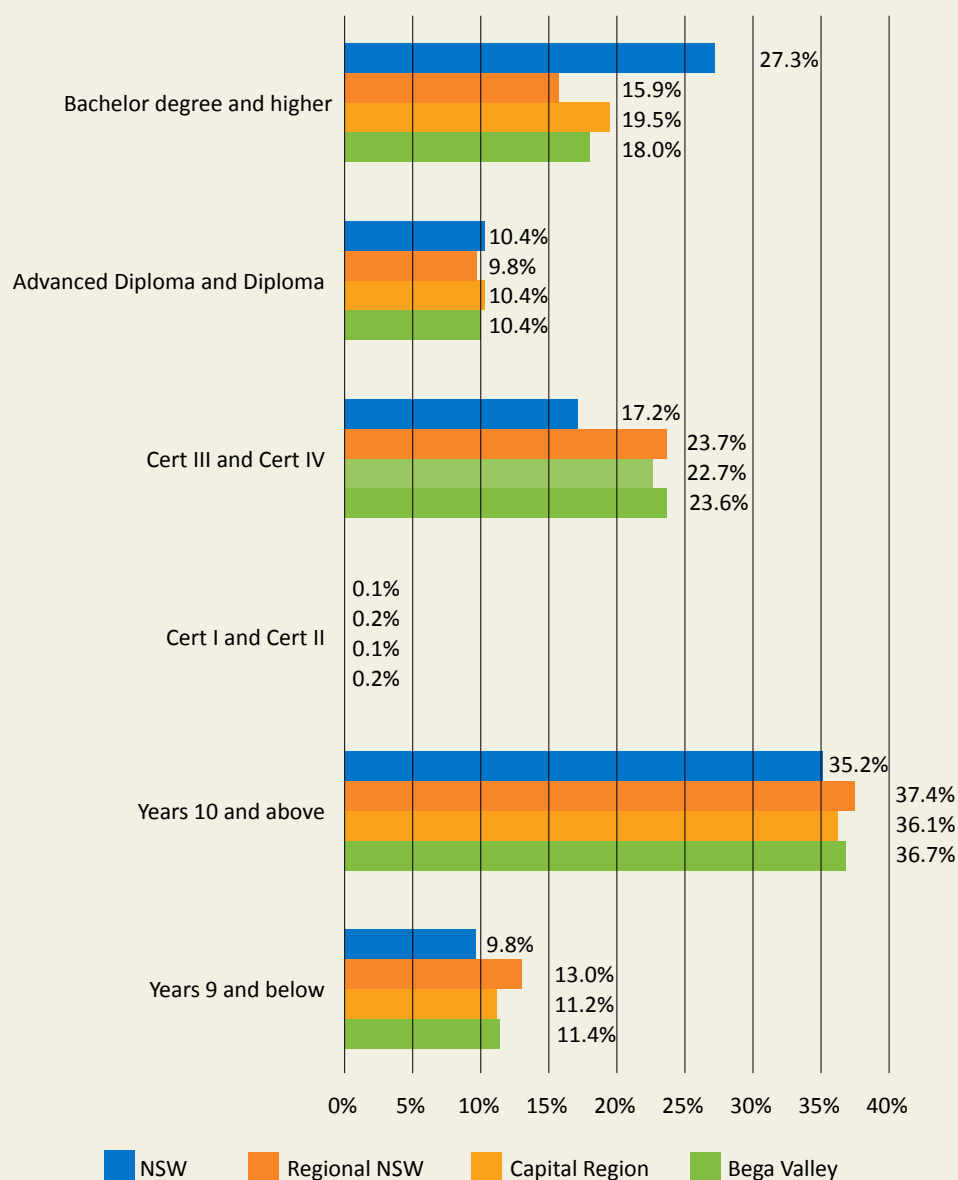
<sup>32</sup> SA2s represent a community that interacts together socially and economically and approximate to Significant Urban Areas and Tourism Regions in the Australian Statistical Geography Standard (ASGS) Non-ABS Structures. There are 558 in NSW and 2,310 SA2 regions covering the whole of Australia.

# Education

Higher levels of Certificate qualification but lower levels of bachelor degrees in the Shire

Reflecting the Capital Region and regional NSW, the Bega Valley Shire has markedly lower rates of those qualified with a bachelor degree and beyond but higher rates of those qualified up to Certificate III and Certificate IV level compared to NSW as a whole.

## Highest level of education attainment



Source: ABS 2016 Census

## Industry

Gross Regional Product Local jobs	\$1.49 billion in 2018-19 <sup>33</sup> . 10,889 (in full-time equivalent numbers) in 2018-19 <sup>34</sup> .
Strong employment numbers in a range of industries across the Bega Valley Shire area suggests resilience <sup>35</sup>	Health Care and Social assistance: 1,895 persons. Retail trade: 1,524 persons. Accommodation and Food services: 1,412 persons. Construction: 1,202 persons. Manufacturing: 1,060 persons.
Growth in employment across some industries between 2011 and 2016 <sup>36</sup>	Administrative and Support services: up 26%. Arts and Recreation services: up by 13%. Health Care and Social assistance: up by 11%. Agriculture, Forestry and Fishing: up by 8%. Information media and Telecommunications: up by 5%. Construction: up by 5%.
Some industries showed falls in employment between 2011 and 2016 <sup>37</sup>	Wholesale trade: down by 34%. Transport, Postal and Warehousing: down by 18%. Manufacturing: down by 13%. Financial and Insurance services: down by 8%.
Almost all businesses are small and the overall number of businesses has remained static over the past few years	The majority of businesses employ less than 20 people, typical of business structure in regional areas. The total count of businesses has remained static between 2015 and 2018.
Wages are lower in the Bega Valley Shire	Bega Valley Shire wages, in 2016, were lower than the averages in Capital Region, regional NSW and NSW as a whole.

<sup>33</sup> Bega Valley Shire economic profile

<sup>34</sup> ibid

<sup>35</sup> ABS Census 2016

<sup>36</sup> ABS Census 2016 and 2011

<sup>37</sup> ibid

<sup>38</sup> ABS Business counts 2015-2018

<sup>39</sup> ABS Census 2016

## Industries of comparative advantage

Location quotient analysis has been completed using 2016 Census industry information to establish where the Bega Valley Shire has comparative advantages. The location quotient is a measure of concentration of employment in an industry sector of Bega Valley Shire compared to the concentration of employment in that industry sector in NSW.

Comparative advantage arises from particular skills or a natural resource in a locality that sees more people employed locally than would be expected, based on the proportion in that sector of a wider or other economic region. For example, a locality with a large gold mine would have a location quotient in the mining sector higher than the NSW result which takes into consideration areas across the state with and without mining operations.

The analysis has been contextualised by comparing the industry presence in Bega Valley Shire as a whole, and the Eden area specifically, against the industry profile of both regional NSW area and the Capital Region. Consequently, the analysis reflects the industrial profile of the area as at the 2016 Census.

Structural changes since 2016 could impact on the current results. However, this analysis is a useful tool to enable an assessment against other regions to illustrate where the Bega Valley Shire has advantages that can be further developed – it is easier to grow sectors where there is an inherent strength already.

The information below shows the areas where the Bega Valley Shire as a whole, and Eden specifically, have comparative advantages. Potentially, these are areas where the region can flex its expertise to further develop associated or value add services and deliver positive employment outcomes from growth opportunities.

### **Bega Valley Shire industries of comparative advantage are:**

- Agriculture, Forestry and Fishing
- Electricity, Gas, Water and Waste services
- Accommodation and Food services

### **For the Eden area, the industries of comparative advantage are:**

- Agriculture, Forestry and Fishing
- Accommodation and Food services
- Other services<sup>40</sup>

In the Bega Valley Shire, additional sectors worth investigating for potential development to attain comparative advantage (given high location quotient scores just below identifying them as sectors offering a comparative advantage at the 2016 point in time) include:

- Manufacturing
- Health care and Social assistance
- Other services

Importantly, developing these industries is reliant on external demand. While strong growth is forecasted for the Health care and Social assistance sector as Australia's population grows and ages, future growth in manufacturing is less certain.

The industries that will be boosted in terms of comparative advantage, influenced by the estimated jobs creation from the 74 major projects (valued at over \$500,000 each) and the increase in cruise ship visitation are:

- Other services
- Retail trade
- Construction

<sup>40</sup> Other services as defined by the ABS includes personal services such as hair and beauty services, profession and other interest groups, some repair and maintenance services not classified in other areas and private households employing staff



More details on the major projects is provided in the Skills and Pathways section of the report and a full list of the projects assessed, plus cruise ship visitation impacts are provided in Appendix 6 (available from Bega Valley Shire Council's website).

Appendix 2 (also available Council's website) provides the details of the location quotient analysis showing the areas where a comparative advantage exists. Industries demonstrating comparative advantage are shown in the following table.

Industries (in ABS ANZSIC classifications)	Eden area industries with comparative advantage	Bega Valley LGA industries with comparative advantage	Capital Region SA4 industries with comparative advantage	Regional NSW industries with comparative advantage
Agriculture, Forestry and Fishing	✓	✓	✓	✓
Mining				✓
Manufacturing				
Electricity, Gas, Water and Waste services		✓	✓	
Construction				
Wholesale Trade				
Retail Trade				
Accommodation and Food services	✓	✓	✓	
Transport, Postal and Warehousing				
Information Media and Telecommunications				
Financial and Insurance services				
Rental, Hiring and Real Estate services				
Professional, Scientific and Technical services				
Administrative and Support services				
Public Administration and Safety			✓	
Education and Training				
Health Care and Social assistance				
Arts and Recreation services				
Other services	✓			

Source: ABS Census and WRI analysis

## Interdependencies between businesses

The relationship between businesses was investigated as part of the research processes. Information was gathered in an online survey of local businesses, with 77 completing the survey. Results of the survey covered numerous areas and they have been used to inform the report across a range of topics. Full survey details are provided in Appendix 3 (available from Bega Valley Shire Council's website).

Where do Bega Valley Shire businesses get the inputs they need to produce their goods and services?	<p>Businesses in the Shire purchase 45.6% of their products from within the Shire.</p> <p>The major supply chain points within the Shire to businesses are located in Bega, Merimbula, Pambula and Eden. 'Other areas of NSW' (26.8%) is the next largest supply area.</p>
What goods and services do Bega Valley Shire businesses buy to produce their goods and services?	<p>On average, 51% of businesses' 3 top products purchased are sourced from within the Bega Valley Shire area.</p> <p>Most commonly purchased products are:</p> <ul style="list-style-type: none"> <li>• Food products</li> <li>• Services (with concentration on marketing, accounting and insurance)</li> <li>• Consumables (broad range but multiple examples of medical products and cleaning products)</li> <li>• Machinery and hardware (broad range with moderate level of concentration on computer hardware)</li> <li>• Office equipment</li> </ul> <p>This illustrates a high level of internal connectedness and reliance between businesses.</p>
Where are Bega Valley Shire products sold?	<p>A total of 57% of all products were sold locally. There was a higher level of local sales of the 3 top products produced by respondents, with 67% sold locally .</p> <p>Within the Shire, the following locations purchase the most of the locally supplied products and services:</p> <ul style="list-style-type: none"> <li>• Bega - 25.4%</li> <li>• Merimbula – 22.4%</li> <li>• Eden – 20.4%</li> <li>• Pambula – 14.8%</li> <li>• Bermagui – 12.2%.</li> </ul>
What are the top 3 products sold by Bega Valley Shire businesses?	<p>The survey respondents identified the following products and services as their top selling products:</p> <ul style="list-style-type: none"> <li>• Tourism related – tourism services, arts supplies and arts services/artworks</li> <li>• Food and beverage products</li> <li>• Retail products</li> </ul>

# Characteristics of the labour force by occupation in the Bega Valley Shire

## Key characteristics of the labour force in the Bega Valley Shire

- A significant number of workers are 55+ years and this age group dominates those employed as Managers
- 70% of Professionals have a bachelor or higher qualification
- 69% of Technicians and Trades workers have a Certificate III or higher vocational education qualification
- High proportion of part-time workers:
  - 63% of workers in both Community and Personal services and Sales workers are part-time
  - 52% of Clerical and Administrative workers are part-time
  - 43% of Professionals are part-time
- Sales workers have the highest number of young workers aged between 15 and 24 years (28%) and they have the lowest educational attainment status
- Jobs are expected to increase nationally in Health care and Social Assistance work areas, which is also expected to be seen in the Bega Valley Shire to meet the aging population's needs
- Professionals in Australia are similarly expected to increase in number between 2019 and 2024. This is an opportunity for Bega Valley Shire to capitalise on by, for example, offering relocation packages to workers who can work remotely.

Occupation Group	Employment				Part time	Age profile		Workforce educational profile			Projected employment change 2019-24 Australia <sup>41</sup>
	2016	2011	5 year change	5 year % change	%	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications	%
Managers	1,683	1,689	-6	0%	24%	3%	43%	20%	37%	35%	6%
Professionals	1,964	1,891	73	4%	43%	3%	36%	70%	19%	7%	13%
Technicians & Trades Workers	1,625	1,501	124	8%	27%	17%	24%	4%	69%	22%	7%
Community and Personal Service Workers	1,467	1,349	118	8%	63%	17%	27%	12%	46%	32%	16%
Clerical & Administrative Workers	1,362	1,354	8	1%	52%	5%	35%	15%	33%	42%	1%
Sales Workers	1,371	1,240	131	10%	63%	28%	25%	6%	24%	63%	4%
Machinery Operators & Drivers	661	652	9	1%	24%	6%	36%	1%	33%	59%	9%
Labourers	1,625	1,463	162	10%	52%	18%	28%	3%	29%	59%	6%

Source: ABS 2016 Census

41 Federal Government Labour Market portal, <http://lmip.gov.au/>, accessed January 2020

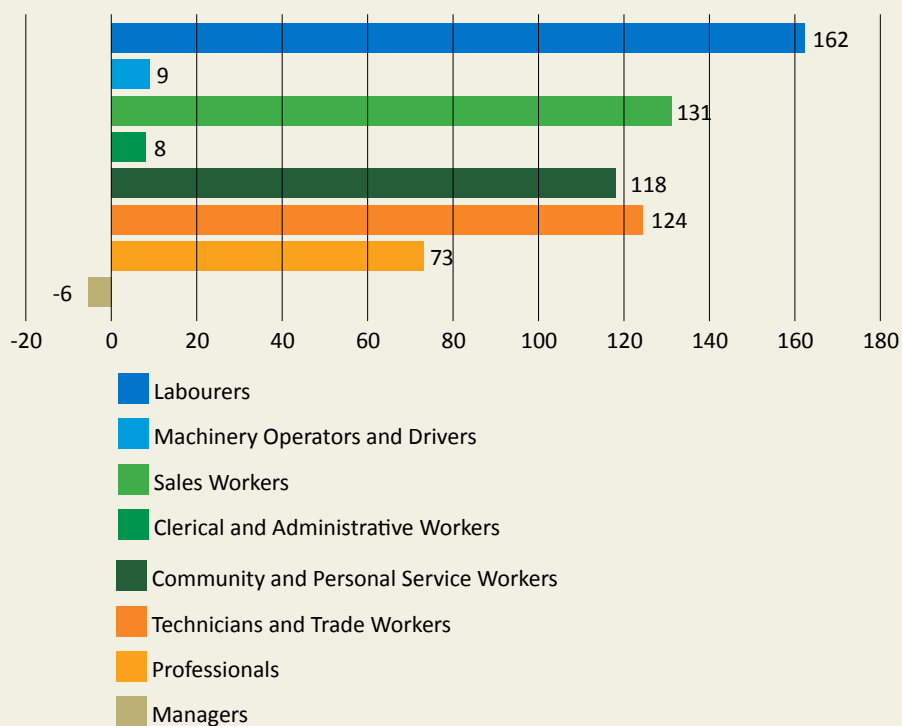
## Occupation analysis

Occupations are a way of defining and grouping jobs that require the performance of similar or identical sets of tasks. There are eight major occupation groups, as defined by the Australian and New Zealand Standard Classification of Occupations (ANZSCO).

The number of employed persons in each occupational group in the Bega Valley Shire, based on 2016 Census data, is shown in the graph below. More details at the subgroup occupation level are in the following table and give a deeper profile of the distribution of jobs in the Bega Valley Shire.

Appendix 4 (available from Bega Valley Shire Council's website) contains detailed data on the occupational analysis.

### Change in number of jobs by occupation group between 2016 and 2011



Source: ABS 2011 and 2016 Census

Occupation Group (OCCP1) in rank order of employing jobs		Number Employed 2016 Census	Top 3 employing occupation (OCCP4) within Occupational Group (OCCP1)	Number Employed	% of total Employed
1	Professionals	1,964	1 Registered Nurses 2 Primary School Teachers 3 Secondary School Teachers	351 213 192	18% 11% 10%
2	Managers	1,683	1 Livestock Farmers 2 Retail Managers 3 Construction Managers	394 310 84	23% 18% 5%
3	Technicians and Trades workers	1,625	1 Motor Mechanics 2 Carpenters and Joiners 3 Chefs	144 135 115	9% 8% 7%
4	Labourers	1,625	1 Food and Drink Factory Workers 2 Commercial Cleaners 3 Kitchenhands	238 211 140	15% 13% 9%
5	Community and Personal Service workers	1,467	1 Aged and Disabled Carers 2 Bar Attendants and Baristas 3 Child Carers	264 161 138	18% 11% 9%
6	Sales workers	1,371	1 Sales Assistants (General) 2 Real Estate Sales Agents 3 Checkout Operators and Office Cashiers	789 146 140	58% 11% 10%
7	Clerical and Administrative workers	1,362	1 General Clerks 2 Receptionists 3 Bookkeepers	225 193 127	16% 14% 9%
8	Machinery operators and Drivers	661	1 Truck Drivers 2 Earthmoving Plant Operators 3 Bus and Coach Drivers	201 74 58	30% 11% 9%

Source: ABS 2016 Census

# Visitor Economy profile in the Bega Valley Shire

More detailed analysis on the visitor economy is provided in Appendix 5 (available from Bega Valley Shire Council's website).

Visitation	<p>Destination NSW/Tourism Research Australia estimated Bega Valley Shire visitation in 2018<sup>42</sup> at 891,000 people, of which:</p> <ul style="list-style-type: none"> <li>• 30,000 were international visitors</li> <li>• 490,000 were domestic overnight visitors</li> <li>• 370,000 were domestic day trippers.</li> </ul>
Value of the visitor economy	<p>The visitor economy was estimated to have outputs and sales valued at \$274.7m in 2018-19 with 1,120 direct jobs and 603 flow-on jobs estimated. This was a minor (0.5%) decline on the 2017-18 estimates. Jobs grew by 5% between 2017-18 and 2018-19<sup>43</sup>.</p> <p>The value the sector adds to the economy's gross regional product was estimated at \$136.5m<sup>44</sup>.</p> <p>The NSW Port Authority is projecting significant growth in the sector resulting from cruise ship visitation to the Eden Wharf (though timelines to achieve growth may be impacted by the effect on the cruise industry from COVID-19).</p> <p>[Note: There are several models to estimate size and value of the visitor economy so values may differ to other models and sources of tourism information].</p>

<sup>42</sup> Destination NSW - Local Government Profile 2018, <https://www.tra.gov.au/Regional/Local-Government-Area-Profiles/local-government-area-profiles>, accessed January 2020. Note these figures represent a rolling average over 4 years.

<sup>43</sup> Bega Valley Council economic profile

<sup>44</sup> ibid

# Eden Economic Profile

A sub-regional analysis of the Eden area has been undertaken with the following summarising the features of the area. Appendix 1 (available from Council's website) has further details.

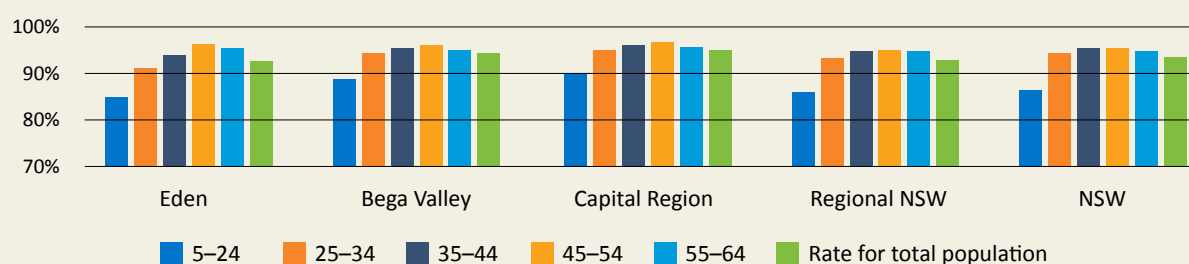
## Population projections and impact on labour force

Summary	<p>3,146 persons in Eden town area<sup>45</sup>.</p> <p>3,877 persons in Eden Coast locality<sup>46</sup>.</p> <p>Very little change in the total population between 2012 and 2018 Estimated Residential Population figures.</p>
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## Labour Force

High unemployment rate <sup>47</sup>	<p>In September 2019, the unemployment rate in Eden was 8.1% which is higher than the NSW rate, Capital Region rate, Bega Valley Shire rate and regional NSW rate.</p> <p>Eden's unemployment rate peaked in 2014 at 12.8%.</p> <p>The September 2019 figure continues a decreasing trend in Eden's unemployment since 2018.</p>
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### Eden employment rate by age cohort



Source: Bega Valley Shire economic model

<sup>45</sup> ABS 2016 Census

<sup>46</sup> ABS 2018 Estimated Residential Population

<sup>47</sup> Small Area Labour Markets, June 2019



## Education

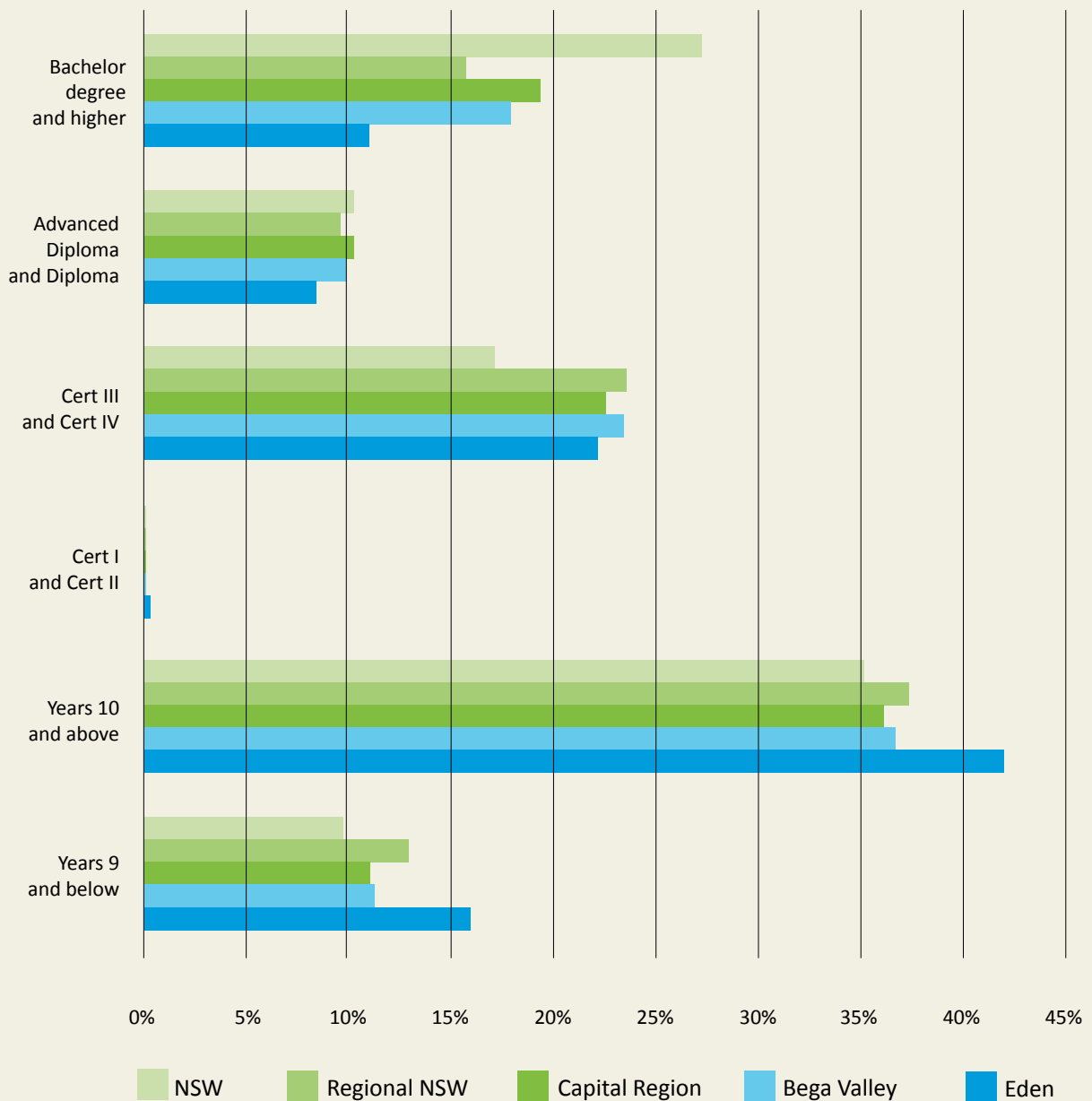
Eden has lower levels of education attainment compared to other areas analysed

Higher levels of educational attainment in Year 10 or above and Year 9 and below than other areas analysed.

Considerably lower levels of bachelor or higher degree attainment.

Moderately lower Certificate III and Certificate IV attainment.

### Highest level of education attainment



Source: ABS 2016 Census

## Industry

Employment numbers <sup>48</sup> in a range of industries across the Eden area show resilience	Retail trade: 150 persons. Accommodation and Food services: 138 persons. Health care and Social assistance: 118 persons. Agriculture, Forestry and Fishing: 86 persons. Manufacturing: 84 persons.
Growth in employment across some industries between 2011 and 2016 <sup>49</sup>	Arts and Recreation services: up by 60%. Administrative and Support services: up 41%. Education and training: up by 35%. Information media and Telecommunications: up by 33%. Other Services: up by 16%.
Some industries showed falls in employment between 2011 and 2016 <sup>50</sup>	Manufacturing: down by 35%. Mining: down by 33%. Electricity, Gas, Water and Waste services: down by 33%. Transport, Postal and Warehousing: down by 30%. Construction: down by 24%. Accommodation and Food services: down by 24%.
Almost all businesses are small and the overall number of businesses has remained static over the past few years <sup>51</sup>	Like the Bega Valley area, little change in the overall number of businesses is evident between 2015 and 2018. Three businesses employing 20+ employees were identified in 2017 and 2018 counts. These businesses have potential for major impacts to the employment profile if structural, or other changes, influence their trading conditions and should be monitored.
Income levels	Eden has a lower annual per person average income at \$33,338 compared to the Bega Shire Valley, Capital Region, regional NSW and NSW as a whole <sup>52</sup> .

48 ABS 2016 Census

49 ABS 2016 and 2011 Census

50 ibid

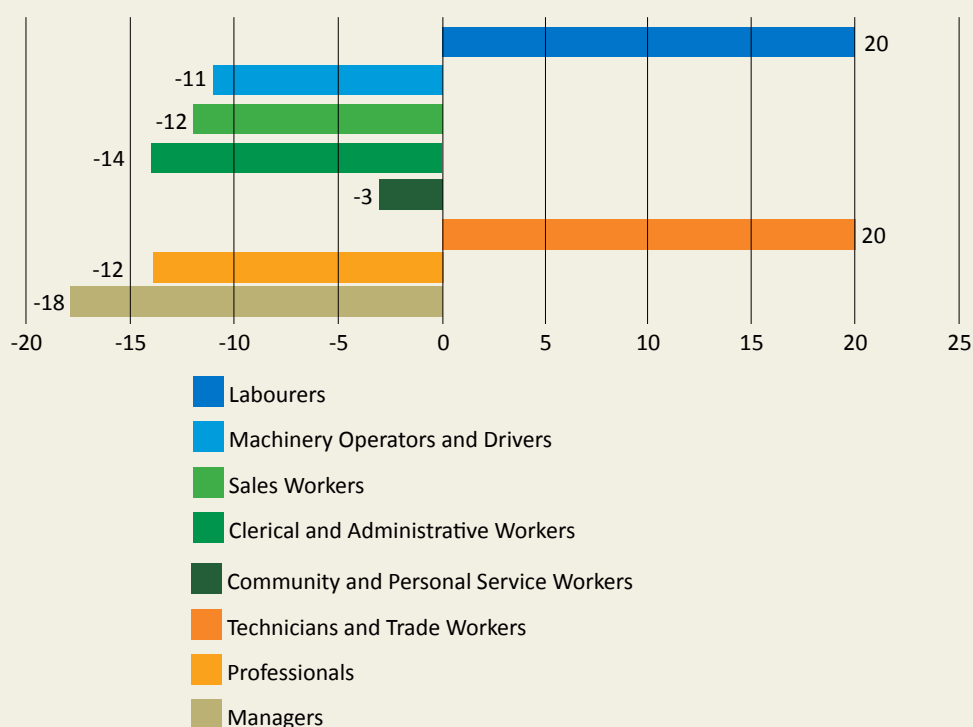
51 ABS Business counts 2015-2018

52 ABS 2016 Census

## Jobs by occupation in Eden

Diverse spread of occupations in Eden	In the 2016 Census, the most numerous occupations were sales assistants, secondary school teachers and truck drivers.
Occupation groups in Eden	<p>Labourer jobs grew by 20 between the 2011 and 2016 Censuses.</p> <p>Jobs declined between 2011 and 2016 in the following occupation groups:</p> <ul style="list-style-type: none"> <li>Managers: down 18 positions</li> <li>Professionals: down 14 positions</li> <li>Clerical and Administrative workers: down 14 positions</li> </ul> <p>Sales workers have both the highest proportion of young workers (aged 15 to 24 years) and most workers not qualified beyond school level.</p> <p>Managers, a grouping where the retail managers predominate in Eden, has the highest proportion (43%) of 55+ years workers.</p> <p>Other than the Professional occupational grouping, where 71% of employees hold a bachelor's degree or higher qualification, few roles in Eden are occupied by university qualified workers.</p>

Change in number of jobs by occupation group in Eden between 2016 and 2011



Source: ABS 2011 and 2016 Census

Occupation Group (OCCP1) in rank order of employing jobs		Number Employed	Top 3 employing occupation (OCCP4) within Occupational Group (OCCP1)	Number Employed	% of total Employed
1	Labourers	222	1 Commercial Cleaners 2 Deck and Fishing hands 3 Timber and Wood process workers	38 21 18	33% 17% 10%
2	Technicians and Trades workers	199	1 Motor Mechanics 2 Cooks 3 Structural Steel and Welding Trades Workers	27 25 22	14% 13% 12%
3	Professionals	195	1 Secondary School Teachers 2 Primary School Teachers 3 Registered Nurses	57 24 24	35% 15% 15%
4	Community and Personal service workers	175	1 Nursing Support and Personal Care Workers 2 Child Carers 3 Education Aides	29 21 21	17% 13% 13%
5	Sales workers	143	1 Sales Assistants (General) 2 Checkout Operators and Office Cashiers 3 Real Estate Sales Agents	84 17 12	63% 13% 9%
6	Clerical and Administrative workers	133	1 General Clerks 2 Office Managers 3 Receptionists	29 27 17	21% 19% 12%
7	Managers	125	1 Retail Managers 2 Caravan Park and Camping Ground Managers 3 Production Managers	30 12 10	23% 9% 8%
8	Machinery operators and Drivers	119	1 Truck Drivers 2 Agricultural, Forestry and Horticultural Plant Operators 3 Paper and Wood Processing Machine Operators	49 12 11	42% 10% 9%

Source: ABS 2016 Census



## SECTION THREE

# Major Investment and Employment Projections

# Major Investment and Employment Projections

In order to identify future skills and jobs needs, the two main areas where there are anticipated investment/cash injections into the Bega Valley Shire economy over the next ten years have been examined. Both are expected to increase economic activity and create jobs.

These two areas:

1. proposed planned investment in major projects in the Bega Valley Shire
2. uplift in tourism through increases in cruise ship visitation, due to the Eden Wharf development

## Planned investment in major projects

Information was collected from Bega Valley Shire Council, NSW and Federal government agencies, and stakeholders on private and public major projects with a value in excess of \$500,000 over a ten-year period. Note that the likelihood of the project proceeding was tested in the consultation processes.

The engagement processes that included workshops and interviews, were also used to expand the list of future major projects. Desktop research further added to the list of projects that were considered.

The key assumption is all the planned projects analysed will proceed and be completed within the ten-year timeframe. A list of the projects can be found in Appendix 6 (available on Council's website).

Capital investment projects valued at over \$500K each, over the next decade	74 projects were analysed. \$376,887,063 worth of investment is estimated from these projects.
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## Eden Wharf development's visitor economy impact

Data on projected cruise ship visitation was provided by the Cruise Development Manager, NSW Port Authority for the 2017-22 period. This was then extrapolated over ten years to arrive at total additional tourist days over the study period. The resulting figure was multiplied by the average tourist, day visitor spend<sup>53</sup> in the Shire to give an estimated total increased cruise visitor tourist spend over ten years.

Net value from additional cruise ships on the Shire's visitor economy	\$93,069,658 over the next ten years <sup>54</sup> . Estimation of growth in visitation from an anticipated level of 33,058 in 2020-21 to over 146,000 passengers in 2029-2030 <sup>55</sup> . [As previously discussed, the impacts of COVID-19 on the cruise industry and visitor economy may lead to a change in timeframes to realise this estimate.]
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<sup>53</sup> Using Tourism Research Australia estimates of expenditure – see appendix 5 for further details

<sup>54</sup> WRI estimate using TRA figures and NSW Port Authority visitation projections

<sup>55</sup> Cruise ship visitation data provided by NSW Port Authority



## Future employment projections by industry and occupation

The impact on employment arising from the major projects and increased cruise ship visitation from expansion of the Eden Wharf operations have been estimated to create 3,232 jobs in the Bega Valley Shire economy (see Appendix 6 for details – available from Council’s website). The total value of these major projects and increased visitor expenditure was entered into Bega Valley Shire’s economic profile model<sup>56</sup> to estimate the increase in job numbers.

Job numbers arising from major projects have been identified as full-time equivalent (FTE) jobs and an assessment of how many of these would be new jobs rather than being filled by existing workers was made. All jobs are local jobs that will be available in the Bega Valley Shire area.

A baseline of the value of a typical year’s construction of non-residential development was established. By establishing the baseline level of construction, an estimate of the construction jobs that already exist can be made.

In order to determine which jobs would be required above the baseline level of construction activity in the Bega Valley Shire, the average value per year of non-residential building approvals in the Bega Valley Shire was calculated and multiplied over a ten-year period. This value was subtracted from the total value of listed major projects to determine the difference in values. The ratio of these values was then multiplied against the total job figures to determine how many additional jobs would be created above the normal, or baseline number of construction-related jobs in the Bega Valley Shire in a typical year.

Jobs created to service the increased visitor expenditure from the growth in cruise ships visitation are all considered to be new positions.

Data used to model these impacts came from a range of sources including the ABS, Council’s economic profile model, desktop research, information on cruise ships visitor numbers supplied by the NSW Port Authority and WRI (the research consultants) estimates.

The modelling assumed all major projects will occur within the next ten years. The distribution across industry sectors and occupations has been assumed to mirror the distribution of jobs across industries in the current Bega Valley Shire economic structure.

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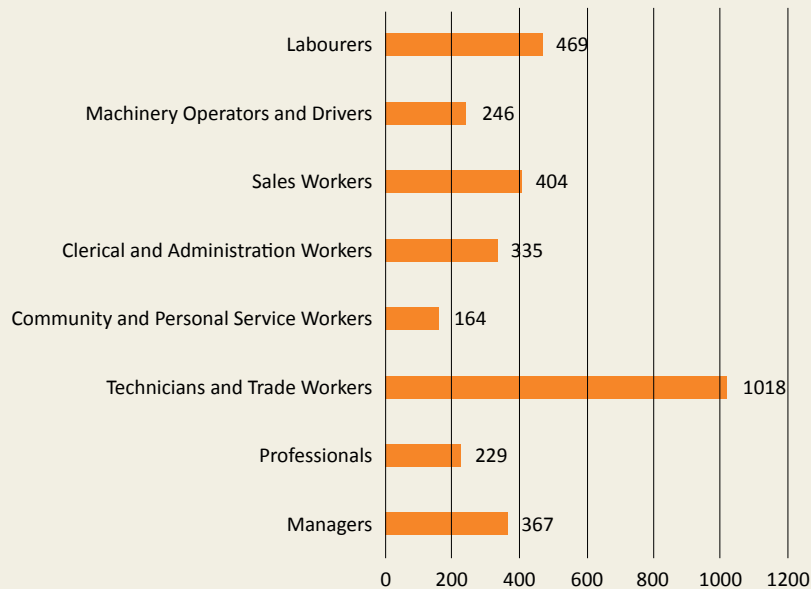
<sup>56</sup> Bega Valley Shire economic profile, supplied by id Consulting



**Characteristics of the jobs arising from the major projects and cruise ships visitation increases are:**

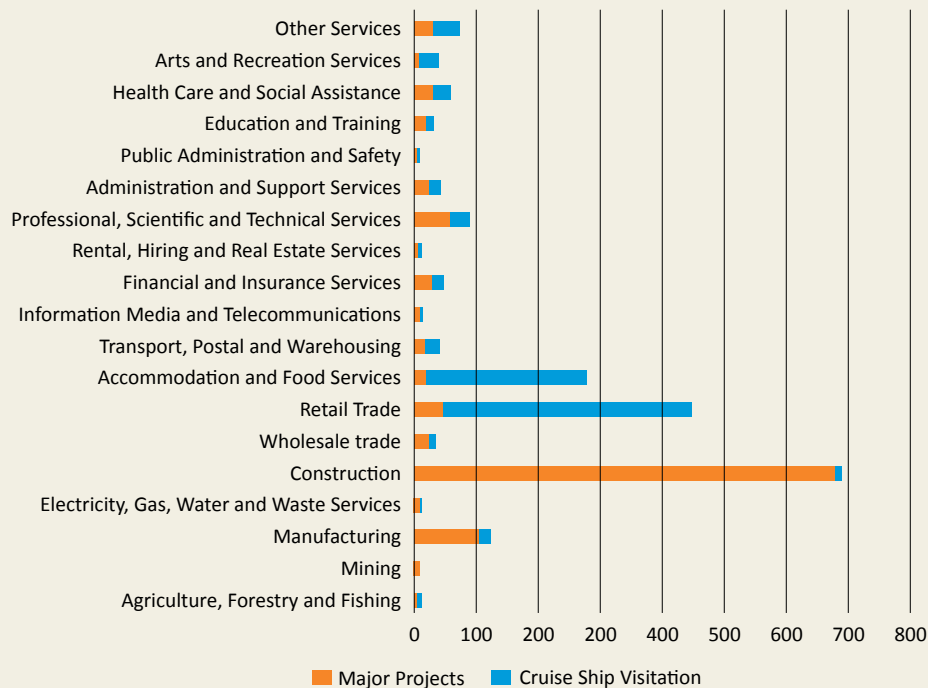
<p>Total estimated jobs from proposed major projects</p>	<p>2,296 (direct and flow on) total jobs are estimated from the 74 projects considered – of these 1,143 are new jobs.</p> <p>1,359 (973 direct and 386 flow on) of total jobs are construction-based jobs. Of these, 676 (484 direct and 192 flow on) are new construction-based jobs.</p> <p>The remaining 938 total jobs, 467 which are new, are flow-on jobs distributed across a wide range of industries with significant increases as follows:</p> <ul style="list-style-type: none"> <li>• Manufacturing: 214 total jobs, of which 106 will be new jobs</li> <li>• Professional, Scientific and Technical services: 117 total jobs, of which 58 are new jobs</li> <li>• Retail trade: 95 total jobs, of which 47 are new jobs</li> <li>• Other services: 61 total jobs, of which 31 are new jobs</li> <li>• Health care and Social assistance: 61 total jobs, of which 30 are new jobs</li> <li>• Financial and Insurance services: 60 total jobs, of which 30 are new jobs</li> </ul>
<p>Occupations to be positively impacted by the major projects</p>	<p>Major jobs creation in the following occupations:</p> <ul style="list-style-type: none"> <li>• Carpenters and Joiners: 238 total jobs, of which 118 are new jobs</li> <li>• Construction managers: 119 total jobs, of which 59 are new jobs</li> <li>• Electricians: 104 total jobs, of which 52 are new jobs</li> <li>• Plumbers: 100 total jobs, of which 50 are new jobs</li> <li>• Painting trades workers: 85 total jobs, of which 42 are new jobs</li> <li>• Earthmoving plant operators: 77 total jobs, of which 38 are new jobs</li> </ul>
<p>Total estimated jobs from Eden Wharf cruise ship visitation expansion</p>	<p>A total of 936 (642 direct and 294 flow on) jobs are estimated to arise from the anticipated expansion of the cruise ship visitation, assuming compound annual growth rates remain at current projected levels.</p> <p>Of the 642 direct jobs with major industry impacts:</p> <ul style="list-style-type: none"> <li>• Retail trade: 316 jobs</li> <li>• Accommodation and Food services: 243 jobs</li> <li>• Other services: 27 jobs</li> <li>• Arts and Recreational services: 25 jobs</li> <li>• Transport, Postal and Warehousing: 14 jobs</li> </ul> <p>The 294 flow-on jobs are estimated with major industry impacts:</p> <ul style="list-style-type: none"> <li>• Retail trade: 82 jobs</li> <li>• Professional, Scientific and Technical: 30 jobs</li> <li>• Health care and Social assistance: 19 jobs</li> <li>• Administrative and Support services: 19 jobs</li> <li>• Manufacturing: 18 jobs</li> <li>• Other services: 16 jobs</li> <li>• Accommodation and food services: 14 jobs</li> </ul>
<p>Occupations to be positively impacted by cruise ship increase</p>	<p>Major job creation impacts, from both direct and flow on jobs, are expected in the following occupations:</p> <ul style="list-style-type: none"> <li>• Sales assistants (general): 170 jobs</li> <li>• Retail managers: 69 jobs</li> <li>• Checkout operators and Office cashiers: 37 jobs</li> <li>• Bar attendants and Baristas: 31 jobs</li> <li>• Waiters: 26 jobs</li> <li>• Kitchen hands: 22 jobs</li> </ul>

### Estimated total jobs by occupation group created in the Bega Valley Shire between 2020 to 2029 as a result of major projects and increased cruise ship visitation



Sources: WRI analysis using derived estimates from ABS, Bega Valley Shire economic profile model and cruise ship statistics supplied by NSW Port Authority.

### Estimated jobs by industry created in the Bega Valley between 2020 to 2029 as a result of major projects and increased visitor spend (through increased cruise ship visitation)



Sources: WRI analysis using derived estimates from ABS, Bega Valley Shire economic profile model and cruise ship statistics supplied by NSW Port Authority.





SECTION FOUR

# Skills Mapping and Pathways

# Skills Mapping and Pathways

This section provides an analysis of occupational areas of current and estimated future employment demand. It also discusses educational pathways required to build skills to support these occupations. This section lists the specific jobs which are currently in demand and are estimated to be in demand over the next ten years in the Bega Valley Shire.

This analysis was undertaken by establishing the **current skills/occupations** needs:

- Identifying occupations where there were high levels of employment
- Assessing occupations that had grown by more than ten jobs between 2011 and 2016 Census, to establish increased demand
- Highlighting the occupations from responses in the business survey<sup>57</sup> that businesses identified as areas where they were seeking applicants

Further analysis was done to estimate **future skills/occupations** needs:

- Labour market projections across occupations and industries were assessed
- Job demand impacts from the occupations identified in the assessment of the major projects and cruise ship increases were included
- By identifying, from the business survey, the areas respondents nominated as likely to be needed

The occupational groupings<sup>58</sup> listed below show analysis of the current and future assessment of each grouping. Forecast conditions and expected impacts are identified along with the educational pathways required for the positions.

## Managers

Manager positions <sup>59</sup>	<p>1,683 managers in the 2016 Census.</p> <p>Overall number of positions stable between 2011 and 2016.</p> <p>Increases in manager roles in construction, farming and aquaculture between 2011 and 2016.</p> <p>Industries employing the most managers:</p> <ul style="list-style-type: none"> <li>• Agriculture, Forestry and Fishing</li> <li>• Retail trade</li> <li>• Accommodation and Food services</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Expected increase in demand for managers.</p> <p>Major projects and cruise ship visitation numbers will add demand for an estimated 367 positions over the next ten years.</p> <p>Opportunities in Construction, Retail trade and Accommodation and Food services.</p> <p>Likely increased demand in Health care and Social assistance to support the aging population and to provide workers for South East Regional Hospital.</p> <p>The national supply of skilled workers in this sector will be short, with most areas similarly seeking employees, leading to demand increases. Bega Valley Shire will be competing with others in the Capital Region where the sector is expected to have employment growth of 14.2% by May 2024<sup>60</sup>.</p>

<sup>57</sup> Appendix 3 has the full survey results (available from Bega Valley Shire Council's website)

<sup>58</sup> Occupation groupings are from the Australian and New Zealand Standard Classification of Occupations (ANZSCO)

<sup>59</sup> ABS 2011 and 2016 Census

<sup>60</sup> Australian Government Labour Market Information Portal – Regional employment projections by Industry by SA4, <http://lmip.gov.au>, accessed January 2020

Managers often perform a range of non-routine, cognitive duties (such as problem solving) which are less susceptible to automation with technology. At a national level, employment of these workers is projected to grow by 7.0% over the five years to May 2024 with significant growth in roles for Education, Health and Social assistance services managers.<sup>61</sup>

The new jobs estimated to be created as a result of anticipated major projects works and increased cruise ship tourism will likely substantially increase demand for manager roles.

In the Bega Valley Shire, new management roles will continue to be created into the future, with increased opportunity in the Construction sector and in the Tourism sector of Accommodation and Food services. Growth will also occur in the Health care and Social assistance sector due to service demand increases, particularly in aged care services as the population ages.

Declines in manager roles are predicted due to impacts of extreme weather events (such as drought and bushfire), leading to likely declining jobs for farmers and farm manager roles, plus structural change likely to continue to impact manufacturing roles.

### Pathway – prerequisite experience and qualifications

This is a relatively skilled group, as managers generally hold senior positions, taking responsibility for staff and operations.

Most managers in the Bega Valley Shire are older, with a large proportion aged 55+ years. They hold post-school qualifications in some roles, such as Construction, Distribution and Production managers, but less often for Farmers and Farm managers and Retail, Accommodation and Hospitality managers. Only a minority of managers in the Bega Valley Shire area hold bachelor or higher qualifications, suggesting these are not prerequisites for most of these roles.

### Bega Valley Shire Managers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 Occupation Subgroup (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Farmers and Farm Managers	537	532	5	1%	5%	55%	16%	30%	45%
Retail Managers	310	323	-13	-4%	6%	32%	12%	34%	45%
Accommodation and Hospitality Managers	223	259	-36	-16%	1%	44%	12%	37%	38%
Construction, Distribution and Production Managers	168	175	-7	-4%	2%	41%	11%	66%	19%
Miscellaneous Hospitality, Retail and Service Managers	116	108	8	7%	0%	31%	21%	41%	33%

Source: ABS Census 2016 and 2011

61 Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020



## Bega Valley Shire, current and future skills/roles in demand – manager roles

Current skill needs	Future skill/occupation need
Cafe and Restaurant Managers	
Conference and Event Organisers	Aquaculture Farmers
Construction Managers	Building/Office Manager
Crop Farmers	Business Development Manager
Farmers and Farm Managers, nfd	Conference and Event Organisers
Finance Managers	Construction Managers
General Managers	Experienced community Management
Hotel and Motel Managers	Farmers and Farm Managers, nfd
Human Resource Managers	General Managers
ICT Managers	Human Resource Managers
Livestock Farmers	Information Computer Technology Managers
Managers	Management, nfd
Mixed Crop and Livestock Farmers	Mixed Crop and Livestock Farmers
Other Hospitality, Retail and Service Managers	Other Specialist Managers
Other Specialist Managers	Policy and Planning Managers
Policy and Planning Managers	Production Managers
Practice Managers	Search Engine Optimisation Managers
Production Managers	Transport Services Managers
Retail Managers	Livestock farmers
Transport Services Managers	

The entries in the table have been identified as areas of current and future skills needs.

The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.

Professionals positions <sup>62</sup>	<p>1,964 positions in the 2016 Census.</p> <p>Number of positions increased by 4% between 2011 and 2016.</p> <p>Increases in roles in Health care and Social assistance in particular between 2011 and 2016.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Health care and Social assistance</li> <li>• Education and Training</li> <li>• Professionals, Scientific and Technical services</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Strong demand for professionals nationally (13.3%)<sup>63</sup> with expected high demand increases in the Bega Valley Shire over the next decade (229 additional jobs)<sup>64</sup>.</p> <p>Growth areas are expected for Health care and Social assistance professionals to support the aging population and for workforce needs from the South East Regional Hospital</p> <p>Information Computer Technology professionals are also expected to be in demand.</p>

Professional employment is projected to grow strongly over the five years to May 2024 (up by 13.3%) across Australia<sup>65</sup>, with particularly strong growth expected for Health professionals, Education and Training and Information Computer (ICT) professionals.

In the Bega Valley Shire, new jobs created as a result of the anticipated major projects and increase cruise ship tourism will moderately increase demand for Professional roles.

Nevertheless, continued growth in the Health care and Social assistance sector, on the back of the aging population and growing health sector needs to support the South East Regional Hospital, means there will likely be strong growth in this sector, in addition to increased opportunity for ICT professionals.

## Pathway – prerequisite experience and qualifications

This is the most skilled occupational group, with most professionals in the Shire having a bachelor degree or higher. Levels of experience required are generally high. As usually seen in the occupation, due to the educational requirement of most jobs very few 15-24 year olds are employed in the professionals group.

However, there is some variation across specific roles. For example, a substantial proportion of Midwifery and Nursing professionals are over 55 years of age, whereas this is not the case for Health Therapy professionals.

Bachelor degree qualifications or higher are generally a prerequisite for these roles in the Bega Valley Shire, with experience requirements dependant on occupation.

62 ABS 2011 and 2016 Census

63 Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020

64 WRI estimate

65 Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020

## Bega Valley Shire Professionals employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15–24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
School Teachers	493	505	-12	-2%	2%	34%	86%	11%	2%
Midwifery and Nursing Professionals	398	363	35	9%	2%	38%	68%	22%	3%
Social and Welfare Professionals	133	128	5	4%	0%	38%	69%	26%	5%
Health Therapy Professionals	99	71	28	28%	0%	21%	94%	6%	0%
Accountants, Auditors and Company Secretaries	92	89	3	3%	0%	30%	73%	16%	11%

Source: ABS Census 2016 and 2011

## Bega Valley Shire, current and future skills/roles in demand – Professionals roles

Current skill needs	Future skill/occupation need
Chiropractors and Osteopaths	Architects, Designers, Planners and Surveyors, nfd
Dental Practitioners	Chiropractors and Osteopaths
Early Childhood (Pre-primary School) Teachers	Communications and marketing
Economists	Dental Practitioners
Educations/trainers/facilitators	Designers
Engineers	Design Engineers
Environmental Scientists	Digital marketing
Experienced mentors	Economists
General Practitioners	Electronics/Control engineers
General Practitioners and Resident Medical Officers	Engineers
	Engineering Consultancy
Graphic Designers	Finance, nfd
Human Resource Professionals	General Practitioners
	General Practitioners and Resident Medical Officers
Industrial, Mechanical and Production Engineers	GIS mapping
Management and Organisation Analysts	Graphic Designers/Web Designers
	Graphic Designers
Marine Transport Professionals	Human Resource Professionals

Midwives	Industrial, Mechanical and Production Engineers
Musicians/Teachers	Insurance restoration-specific
Nurse Managers	Management and Organisation Analysts
Occupational Therapists	Marine Transport Professionals
Other Engineering Professionals	Marketing
Other Natural and Physical Science Professionals	Musicians/Teachers
Physiotherapists	Nurse Managers
	Occupational Therapists
Primary School Teachers	Other Engineering Professionals
Private Tutors and Teachers	Other Natural and Physical Science Professionals
Professionals, nfd	Physiotherapists
Property licensing	Private Tutors and Teachers
Psychologists	Professionals, nfd
Registered Nurses	Psychologists
Secondary School Teachers	Registered Nurses
Social Workers	Social media
Software and Applications Programmers	Social media management
Software engineering	Social Workers
Special Education Teachers	Software and Applications Programmers
Surgeons	Software engineering
Website design	Specialists – paediatrician
Welfare, Recreation and Community Arts Workers	Stakeholder engagement
	Surgeons
	Systems architecture
	Technology/Computer, nfd
	Videography
	Website design
	Secondary School Teacher

The entries in the table have been identified as areas of current and future skills needs. The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.

## Technicians and Trade workers

Technicians and Trade positions <sup>66</sup>	<p>1,625 positions in the 2016 Census.</p> <p>Number of positions increased by 8% between 2011 and 2016.</p> <p>Increases shown for jobs for chefs, carpenters and joiners, and motor mechanics in particular.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Construction</li> <li>• Accommodation and Food services</li> <li>• Manufacturing</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Expected strong demand for Technicians and Trade Workers to May 2024<sup>67</sup> across Australia.</p> <p>Capital projects and Eden Wharf visitation increases estimated to add 1,018 positions in this group which is more than any other occupational group.</p> <p>The jobs demand projections estimated from the major projects and cruise ship growth identified more than double any other occupation group jobs would likely be needed in this group.</p>

In the Shire, the major projects and increase in cruise ship visitation is estimated to create more new jobs for Technicians and Trade workers than any other occupational group.

There will be particular opportunity for Construction-related trades and Food trades workers.

### Pathway – prerequisite experience and qualifications

In the Bega Valley Shire, the vast majority of jobs in this occupation group hold a Certificate III or higher vocational education qualification (but no higher).

The age profile of these roles is generally younger. Apprenticeships and traineeships provide a key training pathway for many occupations in this group, with, generally, a lesser need for experience.

### Bega Valley Shire Technicians and Trades workers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15–24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Food Trades Workers	286	248	38	13%	23%	14%	1%	55%	36%
Bricklayers, and Carpenters and Joiners	153	131	22	14%	24%	21%	3%	82%	13%
Automotive Electricians and Mechanics	151	135	16	11%	21%	19%	0%	81%	15%
Horticultural Trades Workers	143	120	23	16%	10%	32%	6%	50%	35%
Electricians	90	106	-16	-18%	18%	20%	0%	90%	10%

Source: ABS Census 2016 and 2011

<sup>66</sup> ABS 2016 Census

<sup>67</sup> Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmp.gov.au>, accessed January 2020

## Current and future skills/roles in demand – Technicians and trades workers

Current skill needs	Future skill/occupation need
Animal Attendants and Trainers	Animal Attendants and Trainers
Bakers and Pastrycooks	Apprenticeship, nfd
Boilermaker	Architectural, Building and Surveying Technicians
Builders	Auto-electrical
Butchers and Smallgoods Makers	Boilermakers
Camera repair/maintenance	Builder
Carpenters and Joiners	Carpenter
Chefs	Carpenters and Joiners
Chemical, Gas, Petroleum and Power Generation Plant Operators	Chefs
Cinematographers	Chemical, Gas, Petroleum and Power Generation Plant Operators
Civil Engineering Draftspersons and Technicians	Civil Engineering Draftspersons and Technicians
Clothing Trades Workers	Clothing Trades Workers
Cloud Technologist	Cloud Technologist
Cooks	Commercial cooking
Electrical	Cornice, nfd
Electricians	Diesel Mechanics
Gardeners	Equipment maintenance
Greenkeepers	Fitters and Turners
Mechanic	Gardeners
Mechanical Engineering Draftspersons and Technicians	Greenkeepers
Mechanical Maintenance Personnel	Hanging
Mechanics	IT
Metal Trades Workers	Mechanic
Motor Mechanics	Mechanical
Painting Trades Workers	Mechanical Engineering Draftspersons and Technicians
Panel Beaters	Mechanical maintenance
Parts interpreters	Metal Fitters and Machinists
Plumbers	Motor Mechanics

## Current and future skills/roles in demand – Technicians and trades workers continued

Current skill needs	Future skill/occupation need
Quality/Technical	Painter
Radio Technicians	Panel Beaters
Safety Inspectors	Parts Interpreters
Structural Steel and Welding Trades Workers	Plastering
	Safety Inspectors
Technicians and Trades Workers, nfd	Stopping, nfd
Trades	Structural Steel and Welding Trades Workers
	Technical
	Technicians and Trades Workers, nfd
	Trades, nfd
	Vehicle air conditioning
	Vet technician
	Welder
	Bakers and Pastrycooks
	Bricklayers and Stonemasons
	Butchers and Smallgoods Makers
	Cooks
	Electricians
	Hairdressers
	Wall and floor Tilers

The entries in the table have been identified as areas of current and future skills needs.

The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.



Labourers positions <sup>68</sup>	<p>1,625 positions in the 2016 Census.</p> <p>Number of positions increased by 10% between 2011 and 2016 – shared most growth recorded for an occupational group in this period (jointly with Sales workers).</p> <p>Increases in roles in Food and Drink factory workers, Kitchenhands, Housekeepers and Livestock farm workers in particular between 2011 and 2016.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• Accommodation and Food services</li> <li>• Agriculture, Forestry and Fishing</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Expected reasonably strong demand for labourers nationally (5.6%)<sup>69</sup>.</p> <p>Growth areas are expected for labourers roles in Construction, Accommodation and Food services and Agriculture, Forestry and Fishing predominantly with a total of 469 jobs estimated to be added over the next decade<sup>70</sup>.</p>

At a national level, Labourers employment is projected to grow over the five years to May 2024 (up by 5.6%). A substantial number of new jobs are anticipated to be created for Labourers as a result of the major projects and increase in cruise ship tourism, increasing the demand for these roles with an estimated 469 jobs.

In the Bega Valley Shire, a substantial level of Labourers will continue to be created into the future, with particular opportunity for Construction labourers, Accommodation and Food services labourers and Farm, Forestry and Garden labourers.

### Pathway – prerequisite experience and qualifications

In the Bega Valley Shire, most jobs in this occupation group do not have a post-school qualification. For some occupations, such as Food process workers, Certificate III or higher vocational education training qualifications are held by a substantial proportion of those in work.

The age profile of these roles varies greatly across roles, with a particularly high proportion of Food preparation assistants aged 15-24 years old.

Apprenticeships and traineeships provide a training pathway for some but not all occupations in this group, with, generally, lesser need of experience than other occupational groups.

68 ABS 2011 and 2016 Census

69 Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020

70 WRI estimate

## Bega Valley Shire Labourers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Cleaners and Laundry Workers	383	348	35	9%	7%	38%	4%	21%	65%
Food Process Workers	263	220	43	16%	15%	18%	0%	39%	57%
Food Preparation Assistants	196	166	30	15%	54%	16%	2%	14%	79%
Farm, Forestry and Garden Workers	193	161	32	17%	15%	32%	8%	31%	54%
Miscellaneous Labourers	159	152	7	4%	7%	36%	5%	34%	49%

Source: ABS Census 2016 and 2011

### Current and future skills/roles in demand – Labourers roles

Current skill needs	Future skill/occupation need
Building and Plumbing Labourers	Building and Plumbing Labourers
Cleaners and Laundry Workers, nfd	Car Detailers
Cleaning servicing	Cleaning servicing
Concreter	Commercial Cleaners
	Concreters
Domestic Cleaners	Domestic Cleaners
Fast Food Cooks	Farm Staff
Food and Drink Factory Workers	Fast Food Cooks
Forestry and Logging Workers	Fencers
Freight and Furniture Handlers	Food and Drink Factory Workers
Grounds Staff	Forestry and Logging Workers
Handypersons	Freight and Furniture Handlers
Housekeepers	Garden and Nursery Labourers
Insulation and Home Improvement Installers	Handypersons
Kitchenhands	Housekeepers
Livestock Farm Workers	Insulation and Home Improvement Installers
Metal Engineering Process Workers	Kitchenhands
Shelf Fillers	Labourers
	Livestock Farm Workers
	Metal Engineering Process Workers
	Other Miscellaneous Labourers
	Packers
	Paving and Surfacing Labourers
	Shelf Fillers

The entries in the table have been identified as areas of current and future skills needs. The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.

## Community and Personal service workers

Community and Personal services positions <sup>71</sup>	<p>1,467 positions in the 2016 Census.</p> <p>Number of positions increased by 8% between 2011 and 2016.</p> <p>Increases in roles, in Health care and Social assistance in particular, between 2011 and 2016 in specialised roles – Aged and Disabled carers, Child carers, Enrolled and Mothercraft nurses, Dental assistants and Welfare support workers being most significant.</p> <p>Industries employing the most in this group are:</p> <ul style="list-style-type: none"> <li>• Health care and Social assistance</li> <li>• Accommodation and Food services</li> <li>• Education</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Expected strong demand for this group nationally (15.9%)<sup>72</sup> particularly for carers and aides as the health services sector expands, the needs of the NDIS services are realised and as the population ages.</p> <p>Bega Valley Shire will have to compete with strong competition as demand in this sector is expected to be high across Australia.</p> <p>Anticipated opportunities with expanding health services in the Bega Valley Shire, particularly for Health and Social assistance workers with a projected increase of 91 positions in the sector arising from major projects and cruise ship visitation<sup>73</sup>.</p>

Nationally, there will be ongoing strong demand for Community and Personal service worker roles, particularly in the Health and Social assistance industry sector.

In the Shire, a moderate increase in demand for Community and Personal service workers is expected, from the anticipated new jobs created by the major projects and increased cruise ship visitation.

The Bega Valley Shire will have to compete to retain and attract trained workers in the health sector, in particular.

There are also likely to be opportunities in tourism-related hospitality and service sectors, in occupations such as tour guides, waiters in the Accommodation and Food services sector and in Other services where beauty therapists are expected to be in demand.

### Pathway – prerequisite experience and qualifications

Entry pathways, in terms of qualifications and experience, are varied for this group, reflecting the diverse range of services provided by workers. Around 46% of workers have a Certificate III or higher vocational qualification, 32% do not hold a post-school qualification and 12% have a bachelor degree or higher. Health and Welfare support workers are the most highly educated subgroup, with around 90% holding post-school qualifications and over a third holding a bachelor degree or higher qualification.

<sup>71</sup> ABS 2011 and 216 Census

<sup>72</sup> Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020

<sup>73</sup> WRI estimate

## Bega Valley Shire Community and Personal services workers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Personal Carers and Assistants	424	396	28	7%	10%	35%	8%	54%	24%
Hospitality Workers	364	361	3	1%	39%	19%	6%	26%	62%
Health and Welfare Support Workers	199	154	45	23%	1%	35%	34%	55%	9%
Office and Practice Managers	148	132	16	11%	2%	35%	14%	36%	38%
Child Carers	138	114	24	17%	17%	16%	14%	66%	12%

Source: ABS Census 2016 and 2011

## Current and future skills/roles in demand – Community and Personal services workers

Current skill needs	Future skill/occupation need
Aged and Disabled Carers	Aged and Disabled Carers
Ambulance Officers and Paramedics	Allied health services- dietitian, diabetic educator
Bar Attendants and Baristas	Ambulance Officers and Paramedics
Baristas	Bar Attendants
Beauty therapy	Baristas
Cafe Workers	Beauty therapy
Child Carers	Cafe Workers
Dental Assistants	Care Assistants (certificate)
Driving Instructors	Child Carers
Education Aides	Cleaning servicing
	Dental Assistants
Enrolled and Mothercraft Nurses	Driving Instructors
Fitness Instructors	Education Aides
Kayak Guide	Enrolled and Mothercraft Nurses
Nursing Staff	Enrolled Nurses
Onsite care of guests on camping tour	Farm Staff
Painting, nfd	Fitness Instructors

## Current and future skills/roles in demand – Community and Personal services workers continued

Current skill needs	Future skill/occupation need
Police	Food handling
Security Officers and Guards	Hospitality
Waiters	Kayak guiding
Welfare Support Workers	Massage therapy
	Nurse Practitioners
	Nursing Support and Personal Care Workers
	Security Officers and Guards
	Tour guiding skills
	Tourism
	Trainer, nfd
	Waiters
	Welfare Support Workers

The entries in the table have been identified as areas of current and future skills needs.

The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.

## Clerical and Administrative workers

Clerical and Administrative workers positions <sup>74</sup>	<p>1,362 positions in the 2016 Census.</p> <p>Number of positions remained stable between 2011 and 2016.</p> <p>Increases did occur in roles for General Clerks, Information Officers, Contract, Program and Project Administrators and Office Managers.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Health care and Social assistance</li> <li>• Professional, Scientific and Technical services</li> <li>• Public Administration and Safety</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Nationally, the group is expected to remain at current job levels through to May 2024<sup>75</sup>. Net jobs growth may be stymied by structural change from ongoing technology improvements, experienced for some time, in the sector.</p> <p>Demand from major projects and cruise ship visitation may realise 335 positions<sup>76</sup>.</p>

The grouping overall is remaining static in future projections and there have been limited jobs identified in the sector. It is expected this grouping will have low to modest growth in the Bega Valley Shire in baseline labour force figures, created by the impacts of the major projects and increase cruise ship visitation.

### Pathway – prerequisite experience and qualifications

In the Bega Valley Shire nearly half of the employees (42%) in this occupation group don't have a post-school qualification.

Certificate III or higher vocational education training may provide a training pathway for some, but this is usually not a necessary prerequisite for these roles.

### Bega Valley Shire Clerical and Administrative workers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15–24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
General Clerks	225	196	29	13%	4%	36%	13%	32%	46%
Accounting Clerks and Bookkeepers	205	215	-10	-5%	2%	42%	19%	29%	41%
Receptionists	193	183	10	5%	10%	31%	11%	33%	47%
Clerical and Office Support Workers	96	118	-22	-23%	5%	49%	19%	25%	50%
Financial and Insurance Clerks	92	108	-16	-17%	14%	22%	10%	29%	51%

Source: ABS Census 2016 and 2011

74 ABS 2011 and 2016 Census

75 Australian Government Labour Market Information Portal – Occupation projections to May 2024 <http://lmip.gov.au>, accessed January 2020

76 WRI estimates



## Current and future skills/roles in demand – Clerical and Administrative workers

Current skill needs	Future skill/occupation need
Accounting Clerks	Accounting Clerks
Administration	Accounting/bookkeeping
Administration staff	Administration
Bookkeeping	Arts Administration
Contract, Program and Project Administrators	Bank Workers
Conveyancers and Legal Executives	Bookkeeping
General Clerks	Contract, Program and Project Administrators
Human Resource Clerks	Conveyancers and Legal Executives
Information Officers	Couriers and Postal Deliverers
Keyboard Operators	General Clerks
Office Managers	Human Resource Clerks
Practice Managers	Keyboard Operators
Reception	Office Managers
Reception/reservations	Other Clerical and Office Support Workers
Receptionists	Practice Managers
	Purchasing and Supply Logistics Clerks
	Receptionists
	Secretaries

The entries in the table have been identified as areas of current and future skills needs. The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

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## Sales workers

Sales positions <sup>77</sup>	<p>1,371 positions in the 2016 Census.</p> <p>Number of positions increased by 10% between 2011 and 2016, the equal highest growth among occupation groups (equalled by Labourers).</p> <p>Subgroup positions grew in roles for Sales assistants (general), Pharmacy sales assistants and Real estate sales agents, between 2011 and 2016.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Retail trade</li> <li>• Accommodation and Food services</li> <li>• Rental, Hiring and Real estate services</li> </ul>
Expected impact on the occupation over the next ten years in Bega Valley Shire	<p>Minimal expected growth for Sales workers nationally (4%)<sup>78</sup>.</p> <p>Expected that jobs in the Bega Valley Shire will show stronger growth rates.</p> <p>Strong growth in sales jobs is expected in the Shire, arising from the major projects and cruise ship visitation, with an estimation of 404 jobs to be created if all projects eventuate and cruise ship numbers as projected are realised<sup>79</sup>.</p>

At a national level, Sales workers employment is projected to grow slightly over the five years to May 2024 (up by 4%)<sup>80</sup>.

In Bega Valley Shire, growth is likely to be higher since a large number of new jobs are anticipated to be created for Sales workers as a result of the major projects and increase in cruise ship tourism.

Sales worker roles, in the Shire, will continue to be created into the future, particularly in Retail trade and Accommodation and Food services sectors as a result of tourism growth.

### Pathway – prerequisite experience and qualifications

Less than half the people employed in this group have post-school qualifications and the workforce is the youngest of all the occupational groups in the Shire – nearly 30% aged 15 to 24 years. The 55+ years age cohort provides 25% of the workers, offer the next largest age cohort.

The younger age profile in these jobs is likely because less experience and qualification are required for these roles. Additionally, long trading hours of many retail stores creates part-time employment opportunities for students (63% of jobs are part-time – this shares the highest part-time profile of occupations with Community workers.)

<sup>77</sup> ABS 2011 and 2016 Census

<sup>78</sup> Australian Government Labour Market Information Portal

<sup>79</sup> WRI estimates

<sup>80</sup> Australian Government Labour Market Information Portal

## Bega Valley Shire Sales Workers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Sales Assistants and Salespersons	1010	884	126	12%	31%	22%	5%	21%	66%
Real Estate Sales Agents	146	128	18	12%	3%	46%	14%	41%	36%
Checkout Operators and Office Cashiers	140	150	-10	-7%	46%	18%	2%	12%	79%
Insurance Agents and Sales Representatives	47	55	-8	-17%	7%	16%	16%	39%	45%
Miscellaneous Sales Support Workers	24	13	11	46%	21%	16%	19%	14%	48%

Source: ABS Census 2016 and 2011

## Current and future skills/roles in demand – Sales workers

Current skill needs	Future skill/occupation need
Motor Vehicle and Vehicle Parts Salespersons	Checkout Operators and Office Cashiers
Pharmacy Sales Assistants	Money handling
Real Estate Sales Agents	Motor Vehicle and Vehicle Parts Salespersons
Retail, nfd	Pharmacy Sales Assistants
Retail Supervisors	Real Estate Sales Agents
Sales Assistants (General)	Retail skills
Sales Representatives	Retail Supervisors
Sales, account management skills	Sales skills
Ticket Salespersons	Sales Assistants (General)
	Sales Representatives
	Stock display skills
	Ticket Salespersons
	Tourism/reservations

The entries in the table have been identified as areas of current and future skills needs.

The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.

## Machinery operators and Drivers

<p>Machinery operators and Drivers positions<sup>81</sup></p>	<p>661 positions in the 2016 Census.</p> <p>Small group within the Bega Valley Shire (less than half the next largest group of occupations).</p> <p>Number of positions static between 2011 and 2016.</p> <p>Inter-grouping changes evident with significant increases in roles for Truck drivers and Delivery drivers between 2011 and 2016 while other sub groups declined.</p> <p>Industries employing the most positions:</p> <ul style="list-style-type: none"> <li>• Transport, Postal and Warehousing</li> <li>• Manufacturing</li> <li>• Construction</li> </ul>
<p>Expected impact on the occupation over the next ten years in Bega Valley Shire</p>	<p>Expected moderate, increasing demand for the group nationally (9.2%)<sup>82</sup>.</p> <p>With a number of the stakeholders and those participating in the project workshops citing transportation as a major limitation for sustainable growth in the region, this grouping could experience strong local growth if initiatives are explored to improved regional connectivity.</p> <p>Growth in construction sector jobs for Machinery operators and Drivers is expected if the major projects and cruise ship visitation of 246 jobs is realised.</p>

Bega Valley Shire can expect growth in Machinery operators and Drivers roles into the future, with increase in demand from the Construction industry in particular.

### Pathway – prerequisite experience and qualifications

In the Shire, post-school qualifications are often not essential to gain employment in this group, with 59% of Machinery operators and Drivers not possessing education beyond school level. However, tickets or licences are mandatory for many positions which often require some sort of specific, formal equipment or machinery training.

81 ABS 2011 and 201 Census

82 Australian Government Labour Market Information Portal

## Bega Valley Shire Machinery operators and Drivers employment, age and education characteristics

	Employment				Age profile		Workforce educational profile		
Top 5 (OCCP 3)	2016	2011	5 year change	5 year % change	Aged 15– 24 years	Aged 55+ years	Bachelor or higher	Cert III or higher VET	No post-school qualifications
Truck Drivers	201	186	15	7%	2%	41%	0%	33%	61%
Mobile Plant Operators	159	154	5	3%	6%	29%	2%	32%	58%
Machine Operators	81	69	12	15%	8%	33%	0%	38%	51%
Automobile, Bus and Rail Drivers	72	84	-12	-17%	0%	53%	0%	26%	69%
Delivery Drivers	45	35	10	22%	8%	17%	0%	27%	73%

Source: ABS Census 2016 and 2011

## Current and future skills/roles in demand – Machinery operators and Drivers

Current skill needs	Future skill/occupation need
Bus and Coach Drivers	Earthmoving Plant Operators
Delivery Drivers	Forklift Drivers
Earthmoving Plant Operators	Machine Operators, nfd
Forklift Drivers	Machinery experience- excavator, dozer, forwarder etc
Machine Operators	MC truck license
Licensed Drone Pilots	Operational, nfd
Drivers	Other Machine Operators
Paper and Wood Processing Machine Operators	Paper and Wood Processing Machine Operators
Road and Rail Drivers, nfd	Road and Rail Drivers, nfd
Truck Drivers	Transport
	Truck Drivers
	Livestock Farm Workers

The entries in the table have been identified as areas of current and future skills needs.

The lists have been collated by:

- Analysing changes in occupations between the 2011 and 2016 Census to show current demand
- Identifying occupations where significant employment existed in 2016
- Future demand has been identified based on the estimated jobs to be created from the major projects and increased cruise ship visitation coupled with the occupations businesses across the Shire identified in the business survey as future needs. Occupations identified by survey respondents are coloured  for a single response or  for an occupation identified by multiple respondents.

NFD next to an occupation or skill means no further description available.



## SECTION FIVE

# Challenges

# Challenges

This section is based on comments made by participants in the consultation processes and via ideas generated from desktop research.

Greater detail on the responses from research interviewees and workshops participants is available in Appendix 7 and Appendix 8. Appendix 3 provides business survey analysis. (All appendices are available from Bega Valley Shire Council's website.)

## Industry Challenges

Concerns were raised in the consultation that, in the Bega Valley Shire, there is a reliance on traditional industries which are subject to structural change. Concerns were also raised about the numerous challenges constraining emerging industries.

The following section summarises the challenges identified by industry groupings.

### Agricultural, Forestry and Fishing sector challenges

- Bega Valley continues to be heavily dependent on the Agricultural, Forestry and Fishing sector. Including the agricultural manufactured goods secondary sector and the Shire's major employer Bega Cheese (as a major purchaser of local milk), this sector is responsible for more local jobs than any other.
- The sector has been, and will continue to be, impacted by challenges and structural changes. This is reflected in an expected 1.2% decline in employment in the sector nationwide over the next 5 years<sup>83</sup>.
- The fishing industry, in decline since the closure of the Eden Heinz Wattie cannery in 1999, continues to be limited by sustainable quotas.
- The forestry industry may lose jobs as a result of changing quality of the timber resource and related environmental constraints. Bushfire impacts are expected to be significant.
- The national trend towards increasing use of technology has led to the automation of routine tasks, threatening many lesser skilled tasks which are common in the agricultural industries.
- These industries are particularly susceptible to fire and infrastructure disruptions that can directly impact on supply and/or the import and export of goods, and the costs of freight transport.
- The dairy industry and its employment opportunities are also threatened by rising costs resulting from the drought and lower revenues due to major supermarket pricing policy.
- Bega Cheese held the largest market share in Australian cheese manufacturing in 2019<sup>84</sup>. The business has national significance, and its preservation is of national importance.

Additional challenges for Bega Cheese were identified, including:

- the decline in the processed cheese manufacture market in Australia which is a specialisation of the business
- high transport costs to get business inputs and to send products to market
- increasing competition from competitors (Bega Cheese lost Coles' private label cheese supply to Murray Goulburn in January 2016 but secured a lesser valued contract with Woolworths for private labelled product in July 2016 estimated to be worth more than \$100M<sup>85</sup>)
- difficulties in sourcing skilled and unskilled labour
- Construction employment is heavily influenced by major infrastructure project funding and implementation.
- Labour supply for the construction sector for the proposed major projects and cruise ship increases identified a need for 484 new direct construction jobs on top of the current supply (if all the projects are realised). Attracting applicants will be a challenge.

<sup>83</sup> ibid

<sup>84</sup> BISWorld estimated Bega Cheese was the largest producer of cheese and held 21.5% of the market share in cheese manufacturing in Australia in 2019, IBIS World Cheese Manufacturing In Australia, June 2019, report C1133A

<sup>85</sup> IBISWorld - Cheese Manufacturing 2019, Report C1133A



## Bega Cheese profile

<https://www.begacheese.com.au/>

Formed more than 100 years ago, Bega Cheese is the largest manufacturer of cheese in Australia and held 21.5% of the market's share in 2019 (IBISWorld, 2019). It employs in the Bega Valley, regional Victoria, Melbourne and Queensland. Products include natural cheddar cheese, mozzarella and processed cheese products. They also own Vegemite and Kraft Singles (but not Philadelphia Cream Cheese) following acquisition of most of the US food and beverage company Mondelez International in 2017. In February 2019, the manufacturing facility in Coburg (VIC) closed due to location and expected growth issues.

750 employees work for the company and it is the largest employer in Bega.

The production processes are highly automated and include automatic case-palletisers, un-manned laser guided forklifts and automatic de-boxers at the Bega factory. Bega Cheese produces over 100 tonnes of product annually and its raw ingredients are 100% traceable. Recent innovation has been the canning of cheese for the Middle East market, with 1,300 M tonnes of canned product produced annually.

Bega Cheese estimated their products export value in 2016-17 was \$113M. Exports of over 60M tonnes in 2018-19 were delivered to approximately 40 countries. The company revenue saw benefits from the increase in supplied raw milk negotiated directly with suppliers. IBISWorld anticipates an annualised growth in revenue of 1.1% In the sector for the 2019-2024 period.

Little waste is not re-purposed. Water waste, for example, is used to irrigate surrounding farms and nutrient levels are constantly monitored providing environmental health control.

## Tourism sector challenges

- There is competition within the regional tourism industry where many local government areas have looked to pivot to this sector to boost their economies.
- There are specific challenges to ensure the benefits of the Eden Wharf development are realised. Coordinated improvements to support the predicted expansion are required. Skills development and new business opportunities should be identified and planned for a long-term benefit realisation process.
- The impact of the Black Summer bushfires will be significant on the tourism sector. For the Bega Valley Shire, the loss of Christmas/New Year visitation will have significant and long-term impacts on the businesses who derive significant proportions of their annual income from this season each year. COVID-19 restrictions brought the loss of the Easter visitor period, further exacerbating the serious issues faced by tourism businesses in the Shire. A number of initiatives are in place to encourage visitors to continue to come to regional areas.
- There is a perception that the attributes of the Shire should be promoted more broadly within the region to encourage visitation by locals and to build their awareness. Suggestions also included specific campaigns targeting the major visitor markets in Sydney and Melbourne.
- Recent campaigns encouraging people to buy regional products and visit bushfire impacted areas, such as the Empty Esky campaign, could be explored along with specific relocation/tourism campaigns. The 'Evocities' promotion was identified as potential model to use.

## Health sector challenges

- The establishment of South East Regional Hospital in Bega has created new opportunities, but recruitment issues are creating challenges in accessing a sustainable and well-trained labour force.
- The aging nature of the population will add demand to the number of staff required in aged care facilities.
- The National Disability Insurance Scheme creates challenges for service providers to sustain their businesses with client choice.
- Bega Valley Shire will have to compete with the rest of the nation to attract workers to support the aging population/disability services clients.

## Education sector challenges

- The education sector lacks resources. This limits its ability to provide a wider range of courses in a sustainable manner or to expand to better meet demands. As such, the sector is only able to provide offerings in response to some of the current demand.

A large number of positions in the vocational education training (VET) sector were lost in the Bega Valley between 2011 and 2016 as part of the NSW VET sector's high level of structural change. The limitations in the sector are challenges given a large number of comments centred around training and tailoring of courses that would typically be offered in the VET sector.

- Some comments were made about a need for childcare facilities to assist working parents.



## Industry Constraint Challenges

### Business growth and expansion challenges

The community perceives that the ability to grow new businesses, and enable emerging industries to expand, is hampered by the local geography and the local market size. There were comments expressing a concern about community apathy and a resistance to change and trying new ideas.

The Bega Valley Shire consists of several towns and villages which are geographically dispersed and diversified in terms of social and economic needs and opportunities. This creates challenges to economies of scale/critical mass to specialise effectively and build business without concerted efforts to coordinate and collaborate across sectors.

Other growth challenges:

- Resourcing and funding were identified as issues that are inhibiting investment and growth.
- The challenges for businesses in filling vacancies with adequately skilled locals was specifically cited as holding back business expansion.
- Transport and the brain drain of young workers were also identified as challenges for businesses.

### Reliance on a small number of large businesses and organisations for employment

The Bega Valley Shire is reliant on a small number of large employers. Of private sector organisations, only Bega Cheese, the largest employer in the Shire, employs more than 500 staff. Of the remaining business only 1.3% of employ more than 20 staff (see Appendix 1 – available from Bega Valley Shire Council's website).

This dependence on Bega Cheese for employment is an area of risk and vulnerability for the Shire, especially given the structural and environmental issues facing this business and agricultural industry generally (as detailed earlier). This is a concern expressed by several stakeholders.

## Demographic challenges relating to the labour force

Three issues will continue to cause diminished skills availability in the Bega Valley Shire labour force:

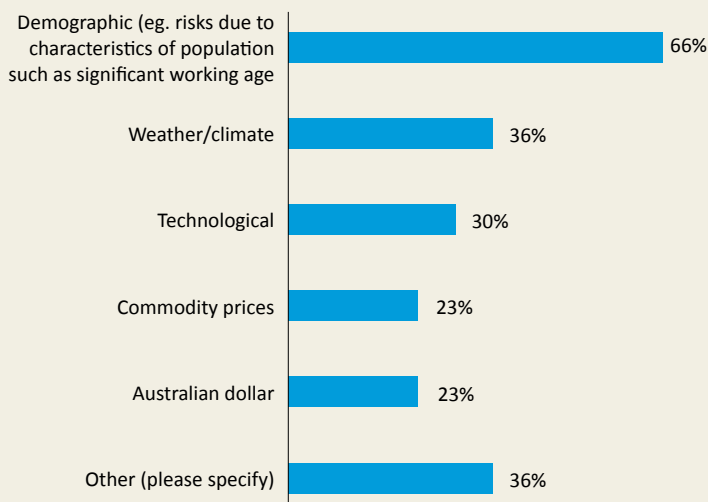
1. The aging of the Bega Valley labour force
2. In migration of older people seeking semi/full retirement
3. Out migration of younger people

Efforts are needed to:

- stem out migration
- better utilise the existing skill sets of the population

Two thirds of the business survey respondents from the Shire recognised a diminishing workforce as a major risk to the economic health of the Shire.

### What are the main risks to the Bega Valley Shire economy that come from outside the Shire



Source: WRI Business Survey

- There was a view from stakeholders that older age, new residents often moved to the Shire to semi-retire in a hospitality-related business. They are perceived to be less likely to offer long trading hours, including weekends, that are required in a vibrant visitor economy.
- The loss of the Shire's youth is attributed by stakeholders to an unquestioned assumption by many locals that school graduates must go to major urban centres to find fulfilling vocational and study opportunities. This view was expressed by the parents of those graduating from school who have influence in their children's decision making regarding the work or study locations the new graduates will explore.
- Youth educators consulted noted that staying local was thought to be uncool.

- While the Bega Valley Shire ranks in the middle of Australian local government areas in terms of socio-economic advantage/disadvantage, it is slightly below the regional local government area medians. Stakeholders identified the region as having pockets of disadvantage and/or acute social problems in particular areas and across particular demographic groups. Eden is well below the overall Bega Valley Shire level of relative disadvantage in the SEIFA index data<sup>86</sup>.
- One major employer commented on how drug and alcohol issues create difficulties in recruiting for manually-based operational roles.
- Youth unemployment, in common with elsewhere in NSW, is a significant issue in the Bega Valley Shire. In 2016, youth unemployment was 11% for the whole of the Shire and 17% for the Eden area, compared to a regional NSW level of 14.3%.
- Unemployment in the Indigenous population of the Bega Valley was recorded at 16.5% in the 2016 Census. Youth unemployment, as is the case for Australia, is particularly high in the Indigenous population. Again, this situation is more acute in some communities than others. For example, it was suggested in the consultation that youth unemployment is close to 100% in the Wallaga Lake Aboriginal community.
- Participation rates for the 15-24 and 55-64 age groups in the Bega Valley Shire are substantially lower (65% and 59% respectively in the Shire) than the 25-34, 35-44, 45-54 age groups (over 80% in the Shire), reflecting a similar pattern for regions across NSW.

It was observed by stakeholders that there can be rivalry and competition, rather than a cooperative mindset, between local towns and communities because they are geographically disparate, and have different sub-cultures, natural and economic endowments, and opportunities.

From an economic development perspective this could limit the ability for good ideas to build momentum and reach a point of collective critical mass where they are sustainable. Collaboration across businesses, with government involvement, was identified as a possible solution.

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86 ABS – Socio-Economic Indexes for Areas - <https://www.abs.gov.au/websitedbs/Censushome.nsf/home/seifa>

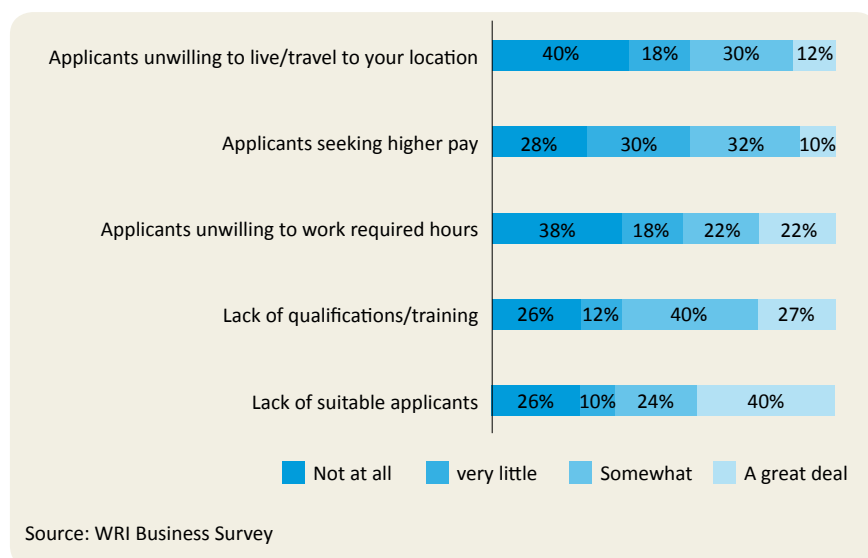
## Mismatch between demand and supply of labour and skills

### 48% of business survey respondents identified they had difficulties recruiting specific skills

- 25% of these respondents identified this issue as having a major impact on their businesses
- 82% of these respondents would increase their staffing levels if the skills were available
- Over 50% of these respondents identified that this was a barrier to future growth of their business

The business survey respondents and stakeholder interviews indicated that Shire businesses have difficulty filling positions. This issue is particularly acute in the Construction, Transport, Education and Training and Health care and Social assistance sectors.

The major reason for this difficulty in recruitment was the availability of suitable applicants and/or lack of qualifications/training.



Inability to employ suitable staff is causing significant issues for businesses in the Shire, with 54% of businesses surveyed stating lack of skills was an impediment to growing their business. Stakeholders commented on this causing operational issues. South East Regional Hospital, for example, is struggling to find suitably qualified locals for the skilled roles, detrimentally impacting on its ability to function to its maximum capacity. Similar issues were reported in the aged care sector.

Related issues in the tourism sector were also reported, with shortages of skills in areas such as chefs and restaurant managers, impacting on quality of products as lower skilled employees have had to fill these roles.

- Of particular concern was a view that the Eden Wharf tourism opportunity may fail to achieve the predicted boost to the economy due to insufficient tourism service offerings and associated appropriately skilled staff. Tailored tourism-related short courses were identified as a need. Access to training in Eden was identified as essential, a concern being a lack of venues for training delivery in the town.
- Issues were not just limited to skilled staff shortages. For example, in the tourism industry it was felt that lesser skilled roles were viewed as transitional and a stop gap. This caused issues in terms of recruitment, quality and retention of workforce.



## Lack of ongoing, permanent jobs and seasonality of employment

Respondents thought there was a significant proportion of casual and part-time work in the Bega Valley Shire. Lower skilled jobs in particular tend to be offered on a casual basis.

This is particularly true of the main employing businesses in the Bega Valley. For example, business in the current tourism industry is demand driven, based around the summer season and is not necessarily seven days a week. Instead work is as and when services are required. Impacts of the anticipated increase in cruise ship visitation may change the part-time nature of work in the tourism sector.

Similarly, low-skilled roles at two of the largest employers, Bega Cheese and the South East Regional Hospital, are often offered on a casual basis.

As a result, the Bega Valley Shire has a large gig economy base and many locals tend to work several jobs to make ends meet. This was seen by some stakeholders as problematic and conducive to unattractive, non-meaningful job offerings. Others saw it as reflecting and suiting the relaxed attitudes to work of those that live in the Shire.



## Lack of relevant, local training

Stakeholder feedback strongly suggested that lack of relevant local training is a significant issue. Only 17% of business surveyed believed that local training would be available to meet their top 5 future skill requirements.

Key reasons provided by stakeholders were:

- Reductions to TAFE funding in recent years, leading to fewer local Vocational Education Training opportunities
- Local TAFE only has anecdotal views on what skills gaps employers are experiencing but needs a solid evidence base to create and fund new relevant courses

Respondents felt that the vast majority of business are small with inadequate local market size to expand and scale up. This led to limited apprenticeship, trainee, upskilling and career advancement opportunities.

While there are online training opportunities available, these are viewed by respondents as not as desirable or useful as physical, face-to-face interactions. They don't have the same peer support or networking opportunities and are thought to lead to higher attrition rates. The alternative is studying outside the Bega Valley Shire which promotes the loss of local youth.

Where training has been offered locally in a relevant vocational sector, this is not always fit for purpose. For example, while there is general tourism-related vocational education courses, these can be long and formalised and don't necessarily directly relate to practical, day-to-day operations (for example, how to manage and build a hotel business).

The inability for Shire business to fill skilled positions is not solely due to lack of training. For example, some training is available locally in the Health care and Social assistance sector. Demand in Australia is however, outstripping supply in this sector, placing a higher competitive challenge on the Bega Valley to attract workers. The Federal Government is predicting a high level of growth in jobs in this sector, with demand in the Capital Region (where labour supply for the local health workers could be most easily drawn) increasing by 17% between 2019 and May 2024<sup>87</sup>.

## Need for soft skills training

Respondents identified a lack of soft (non-technical) skills in applicants that are important to succeed in the workforce and add value to a business. Identified soft skills (variously called interactive, emotional intelligence or people skills) that businesses identified they need included:

- adaptability
- attention to detail
- communication skills
- creative initiative
- desire to strive
- people skills
- leadership skills
- reliability
- social skills
- trustworthiness
- work ethic
- works well in a team

<sup>87</sup> Australian Government, Labour market portal, Regional projections to May 2024, <http://lmip.gov.au/default.aspx?LMIPGainInsights/EmploymentProjections>, accessed 26 January 2020



## Local skilled population leaving

Stakeholder feedback included that many talented and skilled individuals leave the Shire to pursue opportunities in the major urban centres.

In particular, concern was expressed that a high proportion of high school graduates are likely to leave Bega Valley Shire for educational opportunities – a view supported by the high levels of net loss of this cohort. Respondents identified a number of issues for this brain drain:

- continuing education and skills development opportunities are perceived as being limited in Bega Valley Shire
- cultural norms in the Shire that you must move away to get on
- there are constrained job opportunities for young people with limited variety and number of entry level jobs and advancement options. Most local jobs are in tourism, aged care, health or working for Bega Cheese. In the case of the latter, this is mainly processing work. For other work opportunities locals have to look outside the Shire
- there is no clear career road map for jobseekers

Other issues identified in retaining skilled local workers:

- respondents thought wages in Bega Valley Shire are not competitive versus urban centres
- many jobs in the growth sectors of tourism and hospitality are lower income roles
- competition for some skill sets is fierce, as there are a state-wide and national shortages in certain industry growth sectors, such as: Health care and Social assistance; Professional, Scientific and Technical services; Education and Training and Construction
- Snowy Hydro 2.0 project is likely to compete with local business for skilled and non-skilled Bega Valley Shire employees (noting this project is largely outside the Shire and thus not modelled in the jobs impacts estimates)

## Issues attracting and retaining skilled employees and businesses

Stakeholder feedback also identified that there were difficulties in attracting skilled employees to live and contribute to the Shire and its economy. Specified issues from stakeholders include:

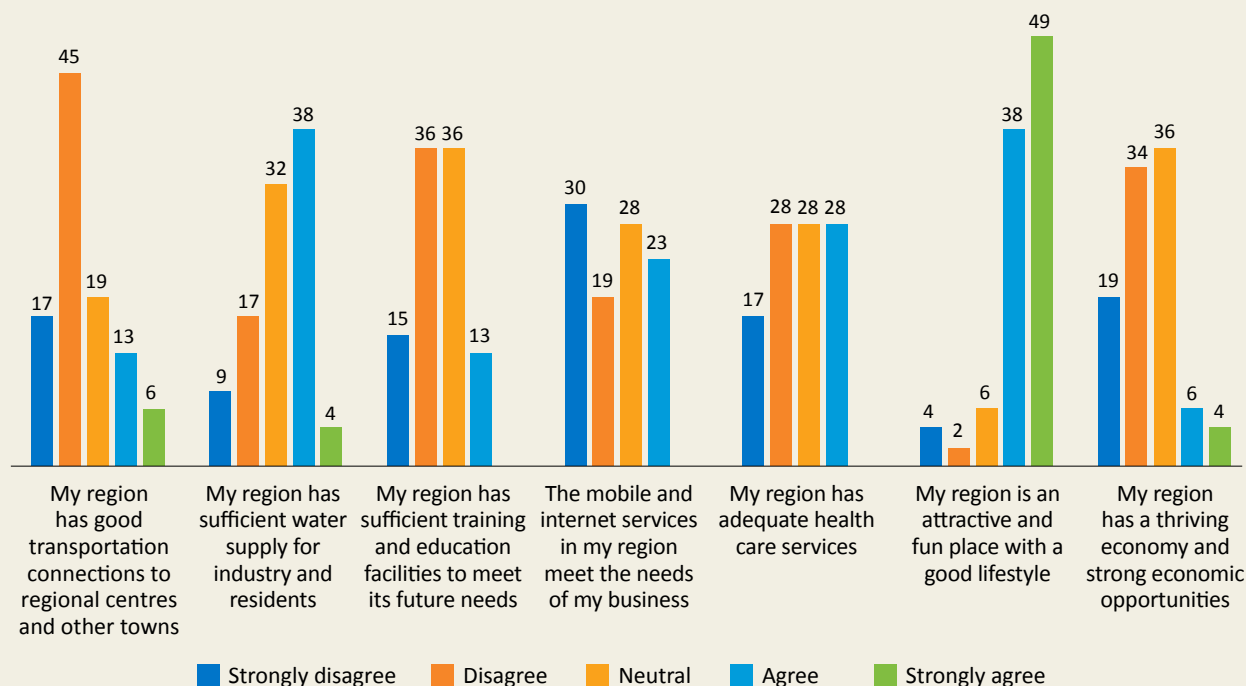
- lack of information about employment opportunities in the area for potential migrating employees
- lack of promotion and understanding of the lifestyle benefits of living in the Shire, particularly in Sydney and Melbourne markets
- limited or inappropriate housing stock available for those looking to move to area
- skilled employees, who would otherwise take up a job opportunity in the Bega Valley area, are deterred by the perceived lack of employment opportunities for their partners
- lack of, or limited, transport infrastructure makes it an unattractive location for large retailers
- poor/limited road and air access to Sydney, Melbourne and Canberra and the regional airport at Merimbula are very limiting for freight volumes
- no rail access

The inability to attract skilled individuals and business to the area has consequences beyond the direct impacts of filling local skilled positions. For example, attracting highly skilled health professionals to work at South East Regional Hospital and live in the Shire will mean these substantial salaries are spent largely in the Bega Valley, boosting the economy indirectly and helping to generate further economic growth and job opportunities.

## Inadequate infrastructure and facilities

A majority of businesses felt that transport infrastructure was an issue in the Shire: 62% of business survey respondents disagreed or strongly disagreed with the statement 'My region has good transportation connections to regional centres and other towns'.

Note: all number values above bars represent %



Source: WRI Business Survey

- Many stakeholders felt the biggest barrier for young people to employment, or training for employment, is transport.
- Distances between towns and villages in the Bega Valley Shire are large and public transport options are very limited, time-consuming and expensive.
- Jobs and training opportunities, such as Vocational Education Training courses, are offered in the larger towns such as Bega and Merimbula, or beyond the Bega Valley Shire, and are therefore not accessible to large numbers of residents.
- Travelling to work or training without a car or a driver's licence is often unfeasible. Whilst an on-demand bus service, Flexibus, had been initiated, it has achieved mixed results and was felt to be underutilised. This issue was particularly significant for the youth of the Bega Valley Shire.

Additionally, the distances between Bega Valley Shire locations and the Shire's distance to Sydney, Melbourne and Canberra, combined with limited road, rail and air transport connections, limit economic and employment development opportunities. For example, there are significant logistical costs in terms of transport and warehousing for businesses wishing to export from the Bega Valley Shire.

As the Far South Coast Regional Economic Development Strategy<sup>88</sup> identifies, this limited transport infrastructure poses a significant risk for the region by limiting competitiveness and access to markets.

88 NSW Government – Far South Coast Regional Economic Development Strategy – 2018-2022

Reliable internet and phone connectivity were also raised as an issue and this view was borne out in the business survey where the majority of responders felt that these services did not meet the needs of their business.

Other issues raised by stakeholders that are challenges for growth in the Shire include:

- lack of affordable childcare limits the ability of parents to work and reduces available labour pool
- housing stock/rental options for those wishing to move to Bega Valley is limited
- there is a significant waiting list for social housing
- many tourist accommodation options are dated and limited, deterring and constraining visitor numbers
- some stakeholders felt tourist facilities at Eden wharf, and Eden's main street, need upgrading so that the needs of anticipated increased cruise ship passengers can be met.

## Lack of awareness of support services, vocational education training and job opportunities

Stakeholders raised the following issues regarding perceived lack of awareness and knowledge about training and employment services and opportunities:

- Finding information on training and employment opportunities is not straightforward and can be inadequate, confusing or misleading.
- Jobseekers have to look in many different places and websites to investigate employment opportunities in the Shire and some jobs are only advertised in the bigger towns like Bega.
- Registered Training Organisations and educational organisations tend to provide generic information and it is difficult to find up-to-date information on what is offered locally.
- Specified areas where there is a perceived lack of knowledge regarding employment opportunities include those arising from the Eden Wharf development and at South East Regional Hospital.
- Parents, who heavily influence young peoples' vocational-related decision making, can advise based on out-of-date information on the training and the employment market in the Shire. This includes the notion that youth must move away from the Bega Valley Shire for better jobs and training/educational opportunities.
- There is a lack of understanding of the types of jobs that may be required in the future, which is creating apprehension among jobseekers and difficulties for training providers and businesses when trying to anticipate future training needs.

## Government policy challenges

The following issues were raised as challenges relating to government policy:

- Payroll tax was mentioned as an unfair burden on businesses which are labour intensive, effectively reducing profits and the ability of these firms to reinvest and expand.
- Inconsistent regulations across state jurisdictions also add unnecessary administrative burden for Bega Valley Shire companies wishing to conduct business beyond the NSW border. For example, in the transportation sector there are no national standards for weight limits or length of truck. The lack of consistency in regulation means a disproportional amount of administrative staff are needed.
- There has been a lack of investment from the NSW and Federal Government in region building projects. For example, no Federal Government departments have been decentralised to the Bega Valley Shire region. It was felt that the Bega Valley Shire was perceived to be too close to Canberra to meet the criteria for being considered as a site for Federal decentralisation initiatives, despite the Shire meeting the Federal Government's criteria of being more than 150km from Canberra.
- Unemployment benefit criteria around having to apply for a minimum number of jobs is unfeasible for many unemployed people who do not have the personal skills or resources to train and look for jobs. This criterion only serves to further demotivate and disenfranchise this cohort and further entrench their unemployment.
- The NSW and Federal Government insufficiently communicate and coordinate the employment opportunities which should be delivered from within the local community. Whilst there is good intent, collaboration can be inadequate, leading to missed local capacity building and employment opportunities.

- Broader social services which underpin the capacity to train and work, such as childcare and mental health services, are inadequate or inaccessible.
- Some stakeholders felt local land zoning is inadequate to facilitate economic development. There is a concern that there is a lack of cleared, flat land in the area with 70% of the Shire being national park/state forest/crown land. Industrial and business zoned land is perceived as being wrongly situated or inaccessible.

## Eden specific challenges

In addition to the challenges already described, consultation revealed the following Eden-specific issues:

- Eden has limited local training available. University and TAFE are available only in Bega, with limited public transport links to and from Eden.
- Eden has been particularly dependent on the forestry and fishing industries. Structural adjustments have heavily impacted on Eden. As a result, there are issues with long term unemployment.
- Most recently, there is a concern that the awarding of the NSW Government's forestry contract to Allied Natural Wood Exports away from Blue Ridge Hardwood may result in job losses in this industry.

Despite Eden's relatively high unemployment rate and level of socio-economic disadvantage relative to other towns in NSW, the median income in Eden is higher than the Bega Valley Shire, implying a large wealth divide between Eden residents.

This view was supported by local stakeholders who described Eden as having 2 cohorts:

- on the one hand, there is a large cohort experiencing socio-economic disadvantage, including a large Aboriginal population and those living in the large, social housing estate
- on the other hand, there are more investors in town because it is a 'magnificent place that still has great future'

Local stakeholders also raised the following issues:

- New residents to Eden tend to be older and moving to the area for lifestyle change. While Bega is seen more as the CBD, and is expected to be more commercial, Eden is perceived as a semi-retirement haven where migrants wish to work when it suits them.
- There is a lack of service culture in Eden which will make building tourism industry challenging.
- There is a certain amount of stigma involved in education/training in the local culture: "Why would you want to do that?"
- Eden is generally a conservative town and there can be resistance to change.





# SECTION SIX

# Opportunities

# Opportunities

Drawing on the research and consultation processes, the following are identified as opportunities to maintain and grow the labour force in the Bega Valley Shire.

Details of the activities to achieve the opportunities are provided in the companion to this document, the Jobs & Skills Bega Valley – Practical Resources Guide.

## Lifestyle/natural attractions and liveability

- Promote the unique lifestyle as a key selling point to attract new residents. Highlight the lower cost of living advantages, proximity to three major capital cities, and key facilities such as the South East Regional Hospital.
- Feature the combination of pristine coast and farming land along with forest, estuaries, lakes and mountains in promotional campaigns to attract and retain workers.
- Explore how local produce (such as oysters, cheeses and other dairy products) offer agri-tourism development opportunities.
- Work with neighbouring local government areas to maximise tourism expenditure in marketing programs.

## Connectivity

- Develop the ability to deliver online education for schools and post-secondary opportunities to address the geographic challenges that limit access to education across the Shire.
- Extend the Bega Valley Innovation Hub to support innovative new business and research and development opportunities, particularly in Information Technology business which will then support new ways for businesses to offer their products to markets.
- Home-based work opportunities could be explored as an attractive feature of jobs in the Bega Valley Shire for potential relocatees.

## Industry opportunities

### Tourism

- A strategic plan for the ongoing development of the Eden Wharf including identifying funding opportunities to ensure expenditure can be financed.
- Increased tourism services training now, to upskill locals to be equipped when the growth in cruise ship related tourism is realised.
- Maximise the uniqueness of the Bundian Way and prepare a specific promotional campaign.
- Exploit new tourism markets including cycling, agri-tourism, gourmet travel, walking trails, arts and crafts, and eco/adventure tourism.
- Develop further initiatives to build the Sapphire Coast brand and explore the opportunities identified in the Far South Coast Regional Economic Development Strategy for a broader regional food brand (for promotional activities with Eurobodalla Shire).

### Health and Social assistance sector

- Develop a marketing campaign to attract workers in the sector to the region, given the high demand nationally for workers in the health sector.
- Realise the potential of the South East Regional Hospital as a training and research facility.

### Central Business District businesses

- Businesses need to develop strategies to cope with online services in order to keep the main streets vibrant and offering employment.
- Continue to implement the CBD Masterplan program to provide vibrant and attractive places for businesses to operate and shoppers to frequent.
- Continue the buy local marketing campaign.
- Create a “bring an empty esky” like campaign to encourage tourism to experience the food products unique to the region.
- Create an online product delivery portal to coordinate product distribution.

### Value adding and collaboration opportunities

- Use the Eden Wharf growth as the catalyst for coordinating tourism services across the Shire, through collaborative marketing and promotional opportunities for business to work together.
- Review communication and engagement processes to ensure the best tools are used to engage with members across groups in the community, particularly with young people and Aboriginal community members.
- Explore collaboration opportunities between cruise ship operators and Merimbula airport, including offering point of entry to join cruises in air/road/ship packages from Merimbula.

### Forestry

- Test feasibility of local processing of pine.

## Transport

- Ongoing investment in the Blue Highway to continue to improve accessibility and encourage workers and visitors to come to the region.
- Explore the feasibility of increased freight and Navy operations out of Eden port to create ongoing employment opportunities. Include investigation of export development funding opportunities.
- Explore collaborative activities where business could save costs by buying or accessing supply chains collectively, including logistics hubs/warehousing options.
- Review transport options to assist students to get to training and workers to get to their employment.
- Explore feasibility of further airport extension for larger jet planes.

## Investment

- Collaboration when seeking grant funding, to add strength and impact of the application, by broader impact identification instead of competing with each other.
- Investment in jobs growth programs and skills development specifically for local Aboriginal communities of the Bega Valley.
- Create a region that encourages investment and makes doing business in the Shire easy by, for example, cutting red tape, making land use planning easier, offering incentives for businesses to add jobs and seeking special activation precinct status for Eden Wharf.
- Ensure contracts contain local and Indigenous jobs guarantees and processes to enforce them.
- Develop a Wallaga Lake program to support jobs creation for locals.

## Education

- Develop a Bega Valley Shire training program designed to grow the skills needed (as identified in the Labour Capabilities Report) to create job-ready locals to fill current and future vacancies. Particular focus should be on Technicians and Trades workers, Labourers and Sales workers in Construction, Retail trade and Accommodation and Food services industries.
- Identify and offer training packages to build web developer and digital officer skills locally to support new markets for businesses to expand into and create more jobs.
- Identify specific tourism-related training to cater for the increased demand from projected cruise ship increases.
- Identify and promote government incentives to encourage employers to train workers.
- Implement a program to engage with young people while still in school, to encourage them to train and stay local.
- Develop programs to build soft skills in schools and for those who have left school but are struggling to land a local job.



# APPENDICES

Appendix 1: Economic profile

Appendix 2: Location Quotient analysis

Appendix 3: Business Survey analysis

Appendix 4: Occupation detailed analysis

Appendix 5: Visitor economy profile

Appendix 6: Major projects and impact of increase  
cruise ship visitation

Appendix 7: Thematic analysis from consultation processes

Appendix 8: Big Ideas workshops summaries

Appendices are available to access from  
Bega Valley Shire Council's website.





# JOBS & SKILLS BEGA VALLEY

## PRACTICAL RESOURCES GUIDE



A guide to potential activities and ideas to help strengthen our Shire's job opportunities, address labour market challenges, and connect our community to quality skills development and meaningful work





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Bega Valley Shire Council would like to thank Western Research Institute (WRI) for the care and dedication shown in delivering the body of work presented in the Jobs & Skills Bega Valley resources. Thanks also to Campbell Page, our project's partnering Employment Services Provider. This project received grant funding from the Australian Government through the Regional Employment Trials program. Greatest thanks to our community, businesses and countless individuals that gave their time, ideas and experience to the project. All have been essential in creating this information bridge that we hope you find valuable.

Note: The consultation undertaken in this project was completed in December 2019. The Bega Valley Shire was one of the areas significantly impacted by Black Summer bushfires of late 2019/early 2020. The research was also undertaken prior to the significant impacts from the COVID-19 virus.

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# Welcome

Jobs & Skills Bega Valley – Practical Resources guide is a companion to the Jobs & Skills Bega Valley – Labour Force Capabilities report. Together they provide important information and ideas that empower us to create a brighter jobs future for the Bega Valley community and economy.

To get the most from this practical guide it should be read in conjunction with the Labour Force Capabilities report, as the guide provides a selection of practical activities that address issues raised in the larger report.

## Where have these labour market ideas come from?

The activities and ideas following have come from a number of sources in response to the issues, opportunities and challenges for the Bega Valley Shire labour market that were identified during the Jobs & Skills Bega Valley project.

Each idea for a project or activity is designed, in different ways, to address current and future needs in the local labour market – needs raised by stakeholders in our labour market and project participants from industry, government, education providers, employment service providers, local businesses and the Shire’s community.

In particular, the Big Ideas workshops (held in November 2019) were rich in ideas coming directly from the Bega Valley community, that have flowed through to this guide.

## How to use this Practical Resources guide

The guide shares with you:

- Ideas for labour market activities and projects across a range of areas
- The variety of organisations and entities that could be involved in bringing a project to life
- Suggestions on what signs to look for to show that we are on the path to success
- Examples of how some of the ideas have been implemented in similar ways or in other places. Look for the Case Studies throughout the report.

The activities and projects following are both prompts and suggestions to addressing some of the issues impacting the local job market. Some activities may already be underway. There are also many more initiatives possible than are captured in this guide. Use the following information as a spark, or a recipe book for what might be achieved by working together.

We hope this Practical Resources guide gets you thinking about how you and your organisation can contribute to making meaningful change in our labour market, and that you use both the report and the practical guide to make better-informed decisions that address our labour market needs.

## Theme Areas for working together



# Who can be brought together to strengthen our labour market?

The activities and ideas in this guide seek to have our labour market stakeholders working together, as well as individually, to create meaningful impact for the Bega Valley Shire community.

Here is a snapshot example of the labour market stakeholders that could be brought together. There are many more – don't see this diagram as exhaustive.



## Maximising the unique selling points of Bega Valley Shire

Promotional campaign to highlight the lifestyle benefits and jobs availability in the Bega Valley Shire to retain youth, attract skilled workers and support tourism expansion.

- Target former residents – particularly those who grew up in the Bega Valley Shire, who are predisposed to the region already – and who are at a critical life stage decision point (such as starting a family) to return.
- Research other locations where needed skills are prevalent. Target these locations having high numbers of people employed in jobs with the skills needed in the Bega Valley Shire.
- Promote the natural beauty of the Shire.
- Collaborative marketing campaigns with neighbouring council areas.
- Continue the Buy Local campaign and extend with similar programs to the “Bring an empty esky” and Buy Regional campaigns to promote local products to visitors

### Who could be involved

- Council
- Chambers of Commerce
- Local Destination Marketing Provider
- Local Tourism Associations
- Local businesses, especially those needing to attract skilled workers

### Success indicators

- Program developed and implemented
- Number of relocatees per year

## CASE STUDY ONE

### Evocities

Seven of NSW's regional cities united to form Evocities: Albury, Armidale, Bathurst, Dubbo, Orange, Tamworth and Wagga Wagga.

The promotion identified the benefits of living regionally, including less time commuting and working, and more family and relaxation time. The campaign aimed to change perceptions of life in a regional city and encourage people to live, work and invest in regional locations. It showcased the abundance of opportunities in the Evocities due to their lower cost of living, strong career and business opportunities and enhanced lifestyle. While now finished, the campaign was active for around 10 years and measured success by the number of relocatees.

<https://evocities.com.au/>

## CASE STUDY TWO

### Buy Regional

A NSW Government initiative, the Buy Regional campaign was designed to support drought impacted businesses in regional NSW by enabling purchases direct from the supplier.

<https://www.nsw.gov.au/regional-nsw/buy-regional>

<https://www.emptyesky.com.au/about/>

# 2

## Communications

### Maximise the size of the local workforce by engaging effectively and providing work opportunities

Create engagement programs relating to skills and training for locals that effectively reach the target audiences. For example, yarning to engage with Aboriginal people; online, dynamic engagement with young people [see also: Youth employment and engagement activity].

Build a mentoring program that connects local job seekers with underemployed/semi-retired/retired skilled residents, to assist in their skills development.

#### Who could be involved

- Council
- Chambers of Commerce
- Employment Services Providers
- Education and training providers, including local schools
- Industry
- Aboriginal communities and organisations
- Community and Service groups

#### Success indicators

- Engagement program developed and implemented
- Number of people participating in engagement activities
- Positive post-implementation feedback from target jobseekers
- Conversion of youth from leaving to staying in the Bega Valley Shire
- Increase in % of locals getting local jobs
- Mentoring program developed and implemented
- Number of participants in mentoring programs

### Youth employment support and youth engagement/retention strategy

Prepare a youth engagement strategy to retain the young people of the Bega Valley Shire.

Key industries to inform local young people of potential career pathways and skills needs. For example, to deliver presentations to schools, participate in an annual jobs expo or through targeted youth programs like Youth Connect.

#### Who could be involved

- Council
- Industry
- Education sector
- Employment Services Providers
- Regional Development organisations

#### Success indicators

- Strategy funding secured
- Strategy written and implemented
- Industry program developed and implemented
- Number of youth effectively engaged

### Eden large employer cluster

Engage with businesses in Eden employing 20+ employees with a view to creating a larger employer cluster/working group, gathering knowledge of future plans for employment levels.

If successful, this initiative could be rolled out to any area or industry cluster in the Bega Valley Shire.

#### Who could be involved

- Program developed and implemented

#### Success indicators

- Council
- Eden larger businesses

### Specific engagement with Bega Cheese

Engage with Bega Cheese on their future planning to understand and plan for any structural change or employment impacts, given the significance of the business to the Shire's labour market and economy.

#### Who could be involved

- Program developed and implemented

#### Success indicators

- Programs developed and implemented

### Cross industry collaboration

Create the communication processes to ensure the three tiers of government, businesses and community are working together to develop and deliver programs that create and maintain local jobs.

#### Who could be involved

- All labour market stakeholders

#### Success indicators

- Programs developed and implemented

## CASE STUDY ONE

### Skillset Youth Connect

Skillset Youth Connect first started in July 2016 and is funded by the NSW Department of Education to deliver the Regional VET pathways initiative.

Skillset Youth Connect's key objectives are to deliver individualised career planning and support services that engage and retain young people in education, vocational training and employment. Since starting, Skillset has worked in collaboration with key agencies to register more than 350 young people. 70% have re-engaged in school, enrolled in training or commenced in paid employment.

<https://skillset.com.au/employment-career-development/youth-connect/>

## CASE STUDY TWO

### Regional Industry Education Partnerships (RIEP)

The Regional Industry Education Partnerships is an NSW Government initiative that strengthens connections between local industry and

secondary school communities to support students in planning their future career pathways. Regional Industry Education Partnerships will take advantage of local knowledge and networks to boost student engagement with local industry.

14 locally-based Regional Industry Education Partnerships officers have been appointed throughout the network of Training Services NSW regional centres.

The Regional Industry Education Partnerships initiative will:

- Build partnerships between employers and local schools
- Support employers to engage with schools and share their expectations for their future workforce
- Help students develop the skills they need to get a job
- Strengthen links between what is learned at school and what is needed in the workplace

[https://www.training.nsw.gov.au/programs\\_services/funded\\_other/riep/index.html](https://www.training.nsw.gov.au/programs_services/funded_other/riep/index.html)

## CASE STUDY THREE

### yourtown Smart Skilled program

Yourtown offers services to create brighter futures including working with employers, families, schools, Indigenous Australians and much more. yourtown offers:

- Job search support, tools and training
- Online resources
- Group activity sessions
- Post placement support and mentoring

yourtown helps employers source, evaluate and place qualified candidates for positions.

The program includes:

- Listening to your needs
- Screening potential candidates
- Organising interviews
- Organising subsidies of up to \$10,000

<https://www.yourtown.com.au/our-services/smart-skilled-hired-youth-employment-program-yep>



### Local job forum for Aboriginal communities

Run a forum to identify job creation opportunities and training needed to deliver better outcomes for the Aboriginal communities of the Bega Valley.

Develop a strategy and program to boost skills and employment opportunities for local Aboriginal peoples, and other Australian Indigenous community members.

#### Who could be involved

- Local Aboriginal communities, groups and organisations
- Industry
- Employment Services Providers
- Education sector
- Council
- National Indigenous Australians Agency
- Indigenous Business Australia

#### Success indicators

- Forum held, with significant participation and direction on future action by local Aboriginal people
- Strategy funding identified and strategy developed
- Strategy outcomes monitored
- High levels of education attained

### Jobs creation opportunities for the Wallaga Lake area

Investigate options for oyster leasing on Wallaga Lake.

Complete a skills audit of the Wallaga Lake community to identify training needs that will lead to jobseekers successfully attaining jobs.

If successful, this activity could be implemented with any of the Shire's Aboriginal communities and LALCs.

#### Who could be involved

- Wallaga Lake community
- Merrimans Local Aboriginal Land Council
- Council
- RDA Far South Coast
- Education sector
- National Indigenous Australians Agency
- Indigenous Business Australia
- NSW Government

#### Success indicators

- Complete business case costing options for Wallaga Lake development
- Seek funding for program pilot
- Complete skills audit of Wallaga Lake community

### Ensure contract conditions for employment of Indigenous Australians are honoured

Identify a process for registering contracts with requirements for employment of Indigenous Australians.

Develop a process to monitor compliance with contract terms.

#### Who could be involved

- Local and non-local businesses operating in the Shire
- Local Aboriginal people and other Indigenous Australians in the Bega Valley
- RDA Far South Coast
- National Indigenous Australians Agency
- Council
- NSW Government
- Federal Government

#### Success indicators

- Design process to register contracts and implement
- Ongoing monitoring to check compliance

# 4

## Industry initiatives

### 4A

#### Tourism

##### Port of Eden/Snug Cove future planning

Strategic plan for economic development of the Port of Eden and Snug Cove precinct to maximise its potential. Considerations could include:

- Eden CBD masterplan initiatives
- Retail sector development
- Training of local workers and jobseekers in customer service, retail trade and food services to support the cruise market and wider tourism sector
- Coordination of business to business opportunities across the Shire, to support Port of Eden activities and spread the benefits of the tourism market. For example, exploring Merimbula airport as an entry/exit point for cruise ship visitors
- Opportunities for increased freight transport and connection through Port of Eden
- Investigate opportunity for the Port to become a special activation zone and to support Navy services
- Investigate steps required to allow cruise ships to dock overnight and for Snug Cove to become a centre for onboarding and offboarding passengers

##### Who could be involved

- Council
- NSW Port Authority
- Australian Customs
- Chambers of Commerce
- Industry
- Federal Government
- Destination NSW
- Local Tourism Service Provider
- Education sector
- Cruise ship companies
- Transport for NSW
- RDA Far South Coast
- Local jobseekers

##### Success indicators

- Strategy developed and implemented
- Increased liaison between businesses in Eden and across Shire to support the initiatives
- Number of locals trained in skills needs areas to support the precinct's economic development
- Number of businesses in Eden CBD and Snug Cove
- Increased uses of Port of Eden
- Special Activation Zone status and opportunities for Navy services investigated

## CASE STUDY ONE

### Gladstone Port

Provides a scholarship and bursary program specifically for Aboriginal, Torres Strait Islander and Australian South Sea Islander students. The program for secondary students encourages academic achievement and cultural awareness, but also participation, attitude and attendance.

Students are awarded bursaries in recognition of their commitment and to assist with the cost of schooling. The Talent Today, Talent Tomorrow Scholarship provided financial assistance of up to \$21,000 over a three-year period.

<https://www.gpcl.com.au/indigenous-relations>

## CASE STUDY TWO

### Darwin Port

Darwin Port is the only major multimodal port located in Northern Australia and is strategically located as Australia's gateway to Asia and Asia's gateway to Australia. The Port is seeking opportunities for increasing investment and trade links with our Asian neighbours.

The strategic plan has identified opportunities for Darwin Port to work with companies in the commodities, agri-business and general trade sectors to maximise the operational efficiency of the Port and the export sector.

The outcome sought is to improve the competitiveness of the NT

economy and increase activities from the Darwin Port. The Port has identified facilities to cater for cruise ship passengers to maximise the opportunity for ships to use the Port. <https://www.darwinport.com.au/trade/projects>

## CASE STUDY THREE

### Special Activation Precincts

A Special Activation Precinct (SAP) is a dedicated area in a regional location identified by the NSW Government to become a thriving business hub. Special Activation Precincts will create jobs, attract businesses and investors and fuel economic development in regional NSW. SAPs are unique to regional NSW and bring together planning and investment to focus on growing jobs and economic activity in the area. All Special Activation Precincts will be delivered as part of the \$4.2 billion Snowy Hydro Legacy Fund and support industries such as:

- Agribusiness and forestry
- Resources and mining
- Tourism and hospitality
- Tertiary education and skills
- Health and residential care
- Freight and logistics
- Defence
- Advanced manufacturing
- Renewable energy
- Technology-enabled primary industries

<https://www.nsw.gov.au/improving-nsw/regional-nsw/snowy-hydro-legacy-fund/activation-precincts/>

## Developing new sustainable tourism markets

Investigate the opportunities identified for:

- Cycling
- Agri-tourism
- Festivals
- Whaling history
- Food tourism
- Walking trails
- Arts and crafts
- Eco-adventure tourism
- Maximising the Bundian Way experience

### Who could be involved

- Council
- Local Tourism Service Provider
- Local Tourism Associations and Visitor Information Centres
- Regional and State Tourism Organisations
- Chambers of Commerce
- Industry, including a broad range of businesses
- NSW Government, including Department of Regional NSW

### Success indicators

- New tourism markets developed
- Increase in tourism spend for domestic and international segments
- Increase in length of stay for visitor segments
- Visitor economy businesses employing more locals

### CASE STUDY ONE

#### George Town mountain bikes

An estimated 80,000-85,000 tourists came to George Town in 2018 with 12,000-17,000 staying overnight. Cycling related tourism in Tasmanian has become a significant sector and the George Town mountain bike development is estimated to add between \$1.53M and \$3.4M into the local economy per annum based on 26,000 visitors. The initial investment in the infrastructure was \$2.8M.

PDF of George Town proposal:

<https://georgetown.tas.gov.au/client-assets/Community/Mt%20Bike%20Trail/GT%20Mountain%20Bike%20Economic%20Analysis%20%20->

### CASE STUDY TWO

#### Margaret River, Western Australia

The Margaret River is a food and wine destination that also supports a cruise ship visitation. It is the most visited destination in WA with visitor expenditure in 2014 totalling \$520M from over a million visitors. Features of the destination include pristine attractions and a large number of food and wine providers. WA Tourism research identified that visitors want four main things from their travel experiences:

- Unique/extraordinary natural sights
- Beautiful beaches/coastal scenery
- Unspoilt/pristine natural environment
- Good food, wine, local cuisine and produce

The Margaret River Busselton Tourism Association (MRBTA) has developed a specific nature-based tourism strategy to maximise achieving the potential of the natural attributes of the region. The plan identified product heroes that currently exist and those that have potential to include in promotion of unique features. The plan includes a mountain bike element in addition to the natural attractions, whale watching, and food and wine elements.

PDF of MRBTA Nature-based Tourism Strategy:

<https://corporate.margaretriver.com/wp-content/uploads/2017/03/MRBTA-Nature-based-Tourism-Strategy-FINAL-1.pdf>

### CASE STUDY THREE

#### Tilba Real Dairy

Tilba Real Dairy is a family owned, multiple award-winning business, creating products of the highest quality using high quality ingredients. Tilba Real Dairy has operated a dairy farm milking pure Jersey cows producing milk, yoghurt, cheese and milkshakes over the past 20 years.

Milk for the Tilba Real Dairy brand is drawn from two sources, the home farm and a pure jersey herd in the Cobargo area, with some milk going to Bega Cheese. As Tilba Real Dairy are a relatively small business, they are unable to manufacture all cheese varieties on-site through their factory and work with other cheesemakers to produce local products.

<http://tilbarealdairy.com/>

### Attract skilled health care workers

Develop a marketing campaign to attract workers needed to meet the anticipated increase in the sector. Include the unique opportunities that come from employment with South East Regional Hospital (SERH).

#### Who could be involved

- Council
- South East Regional Hospital
- RDA Far South Coast

#### Success indicators

- Marketing campaign initiated
- Skilled health care workers attracted to the Shire
- SERH and other health and social assistance organisations able to function at optimal level

### CASE STUDY

#### Beyond the Range

A collaboration of 10 councils in the NSW Central West, Beyond the Range provided jobseekers in the health sector with information on career and training opportunities. It was targeted at giving information for the entire family and to encourage relocation to the region.

The website and Facebook promotion campaign provided specifics about each council area's health community, culture and lifestyle, support for children and the spouse of the health professional, real estate information and frequently asked questions. It linked to the Evocities campaign (mentioned previously in this guide) for those councils who participated in both campaigns.

<https://www.beyondtherange.com.au/>

### Development of teaching and R&D opportunities at South East Regional Hospital

Investigate the opportunities for the expansion of teaching and research and development opportunities at South East Regional Hospital (SERH) and precinct.

#### Who could be involved

- South East Regional Hospital
- RDA Far South Coast
- NSW Government
- Federal Government
- Tertiary and vocational education providers

#### Success indicators

- Evaluation of opportunity complete

## Infrastructure audit

Ensure the infrastructure will support the development of industry into the future. Continue lobbying for black spot funding.

Include in lifestyle promotion marketing how the infrastructure of the region enables remote working opportunities.

Identify opportunities for telecommunications infrastructure to assist the agriculture sector in best practice solutions.

## Who could be involved

- Bega Valley Shire community
- Council
- RDA Far South Coast
- Telecommunications companies
- Remote workers and home based businesses based in Bega Valley
- Industry
- Chambers of Commerce

## Success indicators

- Audit complete and future needs identified

## Local processing of logs

Investigate the opportunity to process logs locally rather than exporting

## Who could be involved

- RDA Far South Coast
- Forestry Corporation of NSW
- Forestry industry and associations

## Success indicators

- Investigation into viability of local log processing complete

### Audit transport services to seek improvements for travel to/from work and education, and freight movement

Audit transport services to establish existing levels of service and identify transport infrastructure development needs.

Identify options and feasibility for increased export through Port of Eden.

Investigate opportunities to support business by collaborating on transport sharing, establishing supply chains, and identifying common suppliers and common destinations. The starting point for collaboration could be the top 3 products, identified by local businesses, as the most commonly purchased inputs – food consumables, machinery and office equipment. (This information was collected in the Jobs & Skills Bega Valley business survey – see the Labour Force Capabilities report for more information.)

Quantify the benefits of continuing the development of the Blue Highway to ensure an ongoing upgrade program continues.

#### Who could be involved

- Council
- RDA Far South Coast
- Transport for NSW
- NSW Port Authority
- Industry, both transport industry, and business needing freight for inputs and outputs

#### Success indicators

- Transport audit complete
- List of future needs identified
- Create collaboration plans for businesses to share transport services
- Additional services from Port of Eden review complete
- Blue Highway long-term planning secured

### Expansion of airport services to create jobs

Investigate the feasibility of expansion of Merimbula Airport for passenger and freight.

Options for increased liaison between the airport and cruise ship companies to encourage the airport to be used as an entry/exit point for cruise ship holidays.

#### Who could be involved

- Council
- NSW Port Authority
- Cruise companies
- Federal Government

#### Success indicators

- Feasibility study complete

### CASE STUDY

#### Freightlancer

Freightlancer is a combination of a marketplace and management system, using a free mobile application, for both drivers and freight owners to transport goods. It has simplified the supply chain for freight owners and transport companies by being reliable, convenient and safe.

Freightlancer services the mining, construction, tunnelling, rail, oil and gas industries as well as adding the new service of providing rapid metro delivery with the network of over 30 million freelancers from the Freelancer.com global marketplace.

Freightlancer is a subsidiary of Freelancer Limited (ASX:FLN).

Freightlancer has been built by a team of freight owners who have built a better way of working for freight owners and transport operators.

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



## IT skills development leading to new stand-alone technology businesses

Establish a training program to build information technology technical skills which then encourages new businesses to be created once skills are transferred/built.

Target the high demand immediate skills needed for first development (as identified in the Labour Force Capabilities report): web design, search engine optimisation, software engineering, digital marketing and other skills for generalist information technology officers.

Consider developing a short term, fee-for-service business/consultancy as skills are being developed in the workforce. This temporary business/consultancy provides the needed information technology skills until locals can establish businesses to deliver services themselves.

Implement mentoring programs, particularly seeking semi-retired, new relocatees who may have skills to transfer.

### Who could be involved

- Bega Valley Innovation Hub
- AusIndustry
- Canberra Region Innovation Network
- Industry
- Education Providers
- Council
- Angel Investors
- Bega Valley community

### Success indicators

- Training program delivered
- Number of new businesses created after participating in skills development
- Implemented mentor program

### CASE STUDY ONE

#### Bega Valley Innovation Hub

Bega Valley Innovation Hub (BVIH) opened its doors in March 2019 with the first cohort of local entrepreneurs, start-ups, creatives and innovative local businesses. BVIH is the first partner of the iAccelerate Innovation Network, fostering regional innovation and entrepreneurship. The program supports entrepreneurs with innovative ideas for creating business opportunities and local jobs to meet the needs of the local economy.

Interest in the iAccelerate business program offered by the BVIH has exceeded expectations with over 21 applications received and the first cohort selected on the basis of business readiness and scalability.

<https://www.iaccelerate.com.au/bega-valley-innovation-hub-launches-with-first-cohort/>

### CASE STUDY TWO

#### WorkLife

With locations in Berry and Kiama, and plans of expanding the network in 2020, WorkLife is a network of regional coworking spaces designed for people who would rather work in a 'members only' shared workspace and coworking community. It provides people with great design, seamless technology and personalised service. They provide spaces for meetings and everyday working needs.

<https://www.worklife.org.au/>



## Funding options for development of information technology businesses

Collaborate in efforts to attract grant funding, as an information technology whole-of-industry approach.

Grant writing development program offered.

Develop a training program that guides businesses into incorporating online service delivery in their product portfolio.

Coordination across three tiers of government for grant application processes.

Investigate an incentivisation program to assist start-ups in information technology business sector.

### Who could be involved

- RDA Far South Coast
- Chambers of Commerce
- Industry
- Council
- NSW Government
- Federal Government

### Success indicators

- Grant writing program launched
- Online skills development for product delivery created
- Coordinated grant writing successfully facilitated
- Option for an incentivisation program identified and developed

### CASE STUDY

#### Bega Valley Shire Funding Finder

Bega Valley Shire Council has made the Bega Valley Shire Funding Finder online service available to individuals, community groups and businesses. It is a one-stop shop for funding.

Powered by GrantGuru, a grants and funding search engine with over 35 years of experience in the grants industry, it makes grant seeking much easier and accessible. The site also contains tips on grant writing. This service is free and provides a grant tracking service to monitor funding opportunities.

<https://begavalley.grantguru.com.au/>

## Developing government support initiatives that enable sustainable business and employment growth

All tiers of government to continue developing new services, programs and processes that assist businesses to meet their goals. This will directly and indirectly support jobs growth in the Shire.

Target areas to encourage business investment:

- Continued 'cutting red tape'
- Employment incentivisation programs
- Improved land use planning processes and communication on land use objectives
- Investment and employment opportunity identification and communication
- Options on affordable housing

### Who could be involved

- Council
- NSW State Government (various departments)
- Federal Government (various departments)
- NSW Small Business Commissioner
- Australian Small Business and Family Enterprise Ombudsman
- Industry
- Chambers of Commerce
- Start-up businesses

### Success indicators

- Communication about measures to assist business growth is easily available
- New processes or programs to support business are designed and implemented
- New and existing businesses successfully use new government initiatives
- Post-implementation evaluation of new and existing services and programs complete

## Expand innovation sector and investigate Centres of Excellence/ formal industry clusters

Establish a Bega Valley Innovation Hub outreach service in Eden.

Research opportunities for Centres of Excellence and/or industry clustering opportunities in aquaculture and fishing, agriculture, agri-tourism and food production.

Investigate means to continue to hold comparative advantage in a number of industries and add to this list to build economic resilience.

### Who could be involved

- Council
- Federal Government, especially cluster establishment bodies such as FIAL
- Universities
- Chambers of Commerce
- Industry
- NSW Government
- RDA Far South Coast
- Employment Services Providers
- Peak Industry Bodies

### Success indicators

- Number of businesses assisted with entrepreneurial skills development
- Number of start-ups created in each location or industry
- Eden Innovation Hub established
- Centre of Excellence feasibility study
- Clustering opportunities investigated around areas of comparative advantage

### CASE STUDY

#### Space to Innovate

One fast-growing business with connections to the University of Wollongong (UOW) is Venus Shell Systems.

The marine biotech start-up, which farms seaweed for food, cosmetics and nutritional supplements, is headed by marine scientist and entrepreneur Dr Pia Winberg, a former head of UOW's Shoalhaven Marine and Freshwater Centre, who is commercialising her own research.

Operating a laboratory, seaweed farm and seaweed processing factory out of the decommissioned Shoalhaven paper mill in Bomaderry, Winberg has also partnered with other local companies to create a marine biotech industry hub in the area. "We need clean coastal areas to grow medical-grade seaweed, which you don't get near major cities but it's also far cheaper to establish a site here," she says.

Awarded a \$600,000 Regional Jobs and Investment Grant in 2017 to boost its manufacturing facilities, the company is projected to grow from seven employees to more than 30 by 2020. Winberg says the grant will help her to scale the business fast to meet rapidly growing demand. "We're also utilising smart tech, apps and clear and succinct job tasks so that the bulk of the work here can be done by local people who we train," she says.

<https://www.venusshellsystems.com.au/>

### Develop education delivery systems that meet needs and are available across the Shire

Provide virtual and face-to-face access options for education delivery across the Bega Valley Shire to enable increased participation in skills-based training.

Target courses in areas of future skills needs. Work collaboratively across education and business to tailor courses and make them easily accessible for locals to prepare them as work ready candidates.

Needs to include consideration of soft skills development as well as technical skills (refer to the Labour Force Capabilities report for details). Training needs to develop work ready candidates in the following occupations:

- Technicians and Trades workers
- Labourers
- Sales workers
- Accommodation and Food services workers

Also, additional skills development for information technology and tourism related tasks

#### Who could be involved

- Industry
- Apprenticeship and traineeship service providers
- Education sector
- NSW Government
- Federal Government
- Council

#### Success indicators

- Education delivery access broadened
- Tailored courses linked to the future needs identified in the Labour Force Capabilities report
- Incentives awareness information provided to business to encourage training



# PUBLICATION LIST

The Jobs & Skills Bega Valley study produced a number of resources

1. Labour Force Capabilities report
2. Practical Resources guide
3. Research appendices 1-8

Resources 1 and 2 are printed together in the same publication.

Resource 3 is only available electronically.

The complete set of Jobs & Skills Bega Valley resources are available from Bega Valley Shire Council's website.

For more information about the project, the resources or to request electronic copies please contact Bega Valley Shire Council's Economic Development team.

