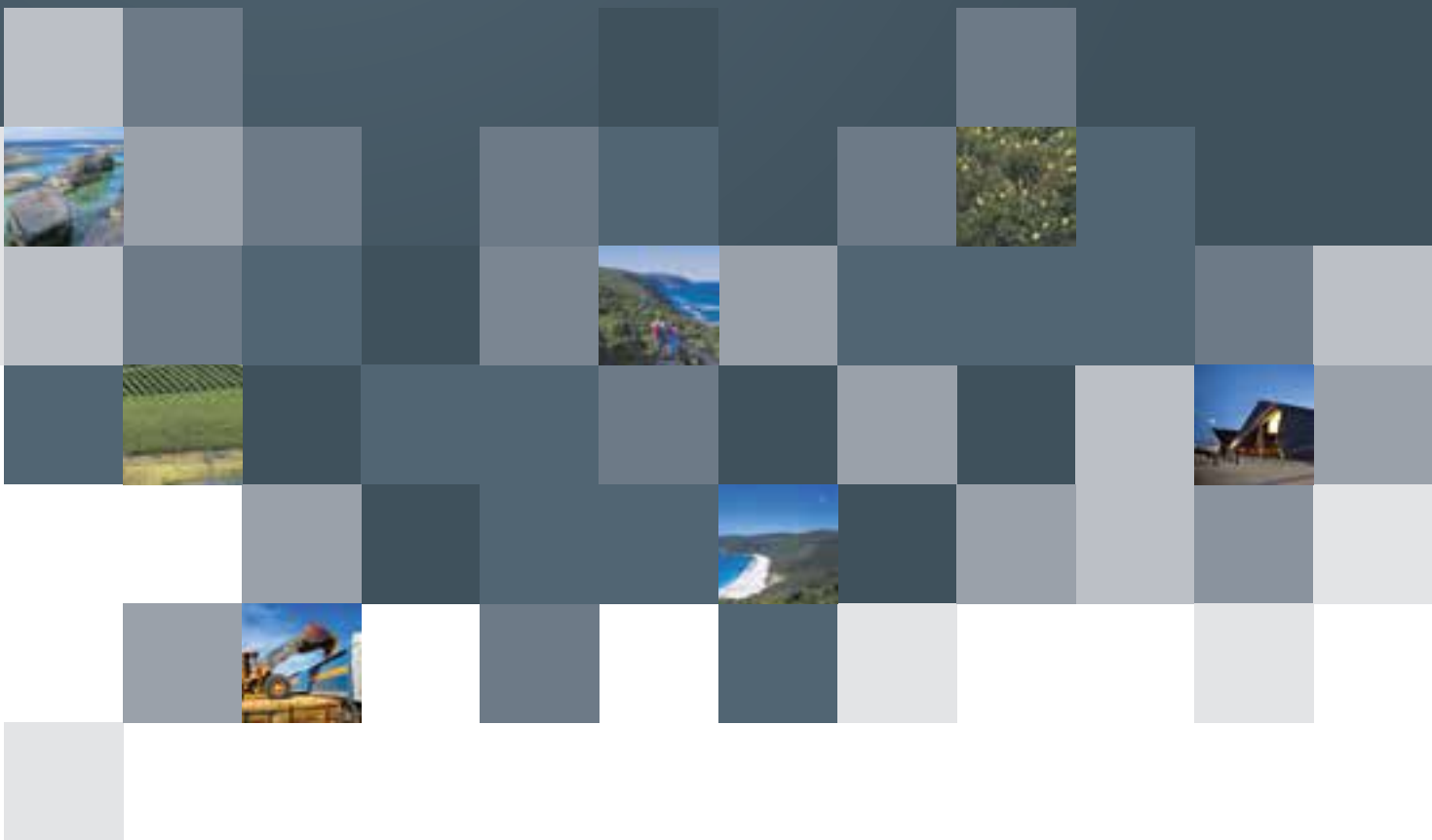


Great Southern workforce development plan 2013–2016



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An electronic version of the executive summary and the full plan can be accessed from www.dtwd.wa.gov.au

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Disclaimer: This publication was prepared under the direction of the Great Southern Workforce Development Alliance and published by the Department of Training and Workforce Development. While the information contained in the publication is provided in good faith and believed to be accurate at the time of publication, appropriate professional advice should be obtained in relation to any information in this publication. Members of the alliance, the State and the Department of Training and Workforce Development shall in no way be liable for any loss sustained or incurred by anyone relying on the information. While every effort has been made to vet the contents of this report, it may contain references to, or images of, people who are now deceased. The Department regrets any offence this might cause.

The term 'Aboriginal' people in this report is inclusive of Torres Strait Islanders. It is noted that the terms 'Aboriginal' and 'Indigenous' have both been used in this report as a result of the terminology used in sourced information.

Guide to implementation

This plan aims to build, attract and retain a skilled workforce to meet the economic needs of the Great Southern region. It contains a range of priority actions which were identified by local stakeholders to address local workforce development challenges.

The plan aligns with the State Government's *Skilling WA – A workforce development plan for Western Australia* (Skilling WA), which provides a framework for government and industry's response to Western Australia's skill and workforce needs.

The Great Southern Workforce Development Alliance, which is made up of industry, community and government representatives from the region, will be responsible for overseeing the implementation of this plan. The alliance will identify those actions within the plan that should be given highest priority and facilitate their implementation. Progress will be reported to stakeholders annually and be included in Skilling WA's annual progress report.

The plan has been designed as an important reference point for all stakeholders as it identifies the challenges, agreed solutions and organisations that have a key stake in its implementation.

For the Regional Development Council as the peak advisory body to the Western Australian Government on regional development matters, the plan is used to identify workforce issues and solutions which require policy consideration across regions. This includes guidance on Royalties for Regions initiatives to support regional workforce needs.

For local government bodies, the plan identifies workforce issues to be taken into account as part of local government decision making processes.

The plan will be used by industry associations and employer peak bodies as a reference when working directly with employers to implement industry and enterprise solutions to workforce development challenges.

The plan also captures the views and aspirations of the broader community and provides a useful reference when engaging on workforce development issues across the region.

The Department of Training and Workforce Development in conjunction with the Great Southern Workforce Development Alliance will facilitate the coordination of State Government responses outlined in the plan. This will include working with those agencies and training providers designated to take the lead on priority actions in the plan.

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Background and methodology

Over recent years, regional Western Australia has faced increased challenges associated with ensuring the availability of a skilled and flexible workforce. It has become increasingly difficult to secure the labour required that would enable regions to meet their full economic and social potential due to the combination(s) of:

- rapid economic growth;
- employment demand;
- inter-regional migration;
- ageing workforces; and
- changes in the nature of education and training.

To address this issue the Western Australian Department of Training and Workforce Development (the Department) is preparing coordinated and integrated workforce development plans for each of the State's nine regions.

These workforce development plans sit within the context of the whole of State initiative *Skilling WA – A workforce development plan for Western Australia* and involves a number of core considerations:

- an assessment of current and future demand for workforce skills;
- an examination of existing capacity and capability of the workforce;
- current and future workforce gaps; and
- the development of realistic and achievable workforce development strategies.

To support the preparation of the *Great Southern workforce development plan 2013–2016* a regional profile has been developed and utilised as background for this plan.

This plan has been developed in partnership with the Great Southern Development Commission and is overseen by the Great Southern Workforce Development Alliance which comprises key representatives from across the region.

Consultations were undertaken through sub-regional forums conducted in Albany, Katanning, Denmark, Mount Barker and Frankland which attracted over 60 participants from across the region. In addition, one on one and small group interviews were held following the forums in Jerramungup and Albany, with representatives of the Aboriginal community, State and Australian government agencies and additional industry personnel. Appendix A contains a list of stakeholders involved in the consultation process.

Pre-reading for these forums and interviews included a discussion paper designed to provide background information for the consultation phase of this project. Importantly, it offered a basis for discussion and debate about workforce planning in the region and provided:

- an overview of selected employment trends in the Great Southern;
- a discussion about some of the occupations in high demand across the region; and
- a review of some of the key attraction and retention issues in the region.

The research and analysis is based on the regional profile contained in this plan and the discussion paper which, for statistical purposes, divided the Great Southern region into two sub-divisions: Pallinup and King.

The data used in this plan are derived from:

- Department of Education, Employment and Workplace Relations Small Area Labour Market (SALM) data;
- Australian Bureau of Statistics (ABS) 2011 Census , labour force and business data; and
- Australian Taxation Office.

In addition, information has been used from data collected by Department of Training and Workforce Development, Department of Regional Development and Lands, Housing Industry Forecasting Group and the Housing and Urban Research Institute of Western Australia.

This plan also references relevant papers and plans on the region.

Profile of the Great Southern region

Regional overview

The Great Southern region is the second smallest region in Western Australia. It covers 39 000 square kilometres of land which represents about 1.5% of the total land mass of the State. At the 2011 Census the population in the region was 55 357 which represents 2.5% of the State's total population.

For statistical purposes, the Great Southern is divided into two sub-divisions: King and Pallinup (figure 2.1). The sub-division of King includes the regional coastal City of Albany, the coastal community of Denmark and the Shire of Plantagenet. Pallinup is the more rural sub-division. These sub-divisions were created, mainly as boundaries to guide the collection of a range of economic, social and demographic data. They also reflect the geographic and economic diversity of the region.

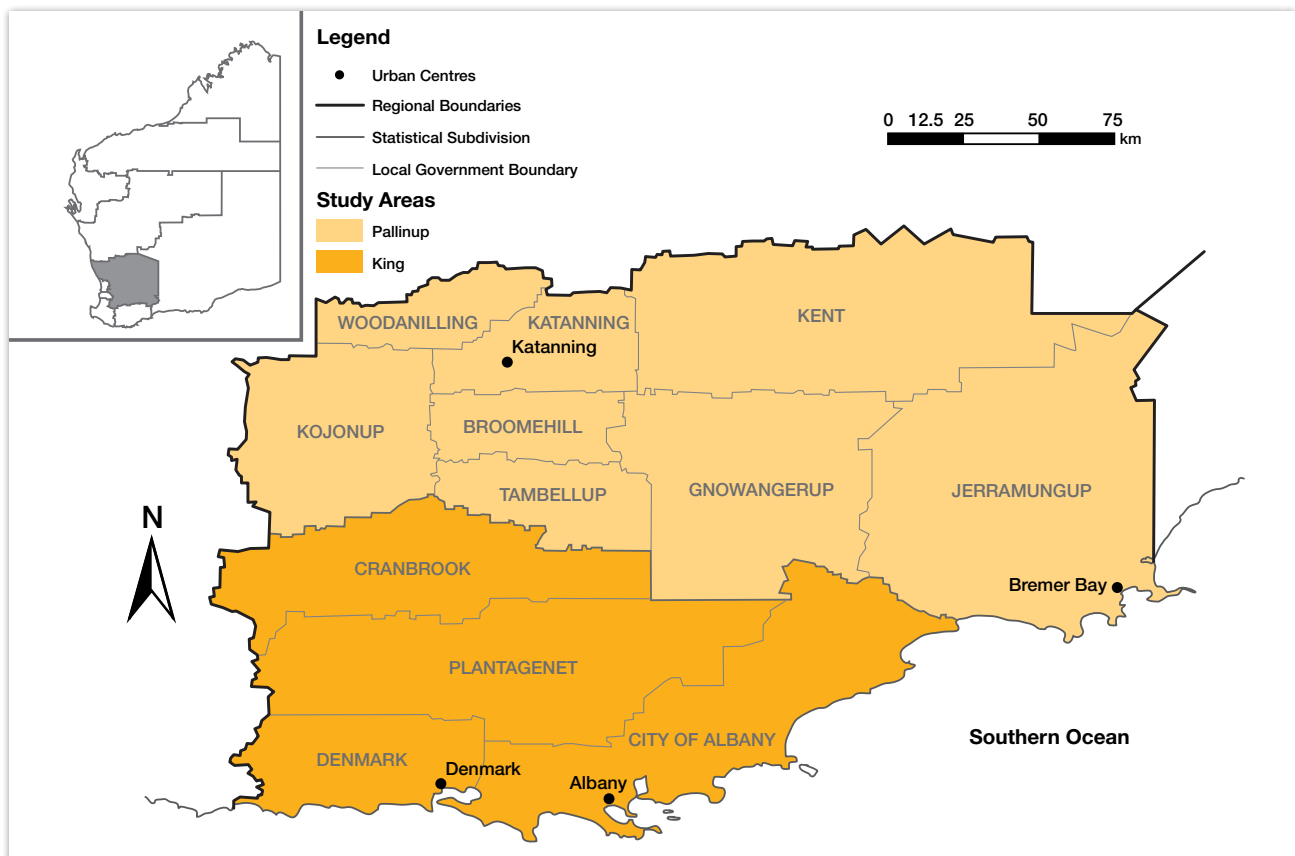
Within the region there are 11 Local Government Authorities. These include the City of Albany and the Shires of:

- Broomehill-Tambellup;
- Cranbrook;
- Denmark;
- Gnowangerup;
- Jerramungup;
- Katanning;
- Kent;
- Kojonup;
- Plantagenet; and
- Woodanilling.

The City of Albany is the regional centre with approximately 60% of the region's population. It includes the majority of the key administrative, business and financial services. Other key population areas are centred around the towns of Denmark, Katanning and Mount Barker.

While the Great Southern is economically diverse, it has a significant agricultural sector. The main industries in this sector include broadacre cropping, livestock and wool. There are major sheep and lamb export abattoirs in the region and the Katanning Saleyard Redevelopment project is expected to be completed in September 2013. Horticulture and viticulture are growing in importance, while manufacturing, construction and the retail trade make considerable contributions to the region's economy.

Figure 1: Statistical sub-divisions of the Great Southern region



Source: Tonts, Davies and Haslam-McKenzie, 2008

Data limitations

Where available, the most recent government and industry data have been used in this plan. There are known concerns with the accuracy of some Census data in rural and remote areas, particularly where labour and populations are highly mobile. Where possible, alternative sources of data have been used, or the trends and patterns have been cross-checked during regional consultations.

It is worth noting that the 2011 ABS Census data was collected using new statistical areas. The statistical area which covers the Great Southern Region is now known as Albany Statistical Area Level (SAL) 3. The statistical sub-divisions of King and Pallinup are no longer used.

The new statistical areas within the Albany SAL 3 are:

- Albany;
- Albany region;
- Bayonet Head – Lower King;
- Denmark;
- Gnowangerup;
- Katanning;
- Kojonup;
- Little Grove – Elleker;
- McKail – Willyang; and
- Plantagenet.

The ABS introduced these new statistical areas to enable comparisons at a more local level. See Appendix B for an outline of these new statistical areas.

These areas combine to make the equivalent of the King and Pallinup subdivisions used in 2006. While there may not be a direct alignment of the new ABS statistical areas with the King and Pallinup sub-divisions, the approximate alignment utilised for this plan is presented in table 2.1.

Table 2.1: Approximate alignment of 2011 and 2006 ABS statistical areas in the Great Southern region

King	Pallinup
<ul style="list-style-type: none"> • Albany • Albany region • Bayonet Head – Lower King • Denmark • Little Grove – Elleker • McKail – Willyang • Plantagenet 	<ul style="list-style-type: none"> • Gnowangerup • Katanning • Kojonup

The ABS has released a time series which allows for comparisons between the 2001, 2006 and 2011 Census on some topics. These have been arranged according to the original statistical sub-divisions of King and Pallinup. Where these statistics have been available and relevant to the discussion they have been used.

In addition, published secondary sources of data and information have been used such as that available from the Great Southern Development Commission, the Department of Regional Development and Lands, the Department of Training and Workforce Development and Regional Development Australia.

Regional economy

This section provides an analysis of the structure and dynamics of the Great Southern regional economy. It focuses on those aspects of the regional economy that have both direct and indirect consequences for labour markets and workforce planning. Central to this is a discussion of the external drivers of economic growth, the structure of the agricultural and resources sectors, industrial concentration, incomes and regional development investment.

The gross regional product (GRP) for the Great Southern region in 2010–11 was \$3.4 billion. This was a 2.0% contribution to the Gross State Product. Agriculture, forestry and fishing; construction; and rental, hiring and real estate services are major contributors to the region's economic output (Department of Training and Workforce Development 2012). The Department of Regional Development and Lands estimated that the GRP for the region in 2008–09 was \$3.7 billion, representing a 2.2% contribution to Gross State Product. The Great Southern's real GRP (adjusted for inflation) increased by 12.7% during 2008–09 (Department of Regional Development and Lands 2012).

From the various studies (Haslam-McKenzie, Tonts and Davies 2008; Regional Development Australia 2009; Tonts, Davies and Haslam-McKenzie 2008) undertaken on the Great Southern, it can be seen that the region's economy is expected to expand and its population to increase. For the most part, research suggests the significant growth is likely to be concentrated in the south of the region, in particular, the local government areas of Albany, Denmark and Plantagenet. To the north of the region, a modest decline or relative stability was expected due to the predominance of agriculture.

With a potential increase in the resources sector and the existing geographical and economic variations across the region, growth and trends in population are unlikely to be consistent. However, from the information presented in this plan and the various studies referenced, the region can expect to face issues of:

- the ageing of the workforce;
- challenges with securing labour supply;
- competitive salaries and wages;
- addressing employee attrition;
- out-migration; and
- competition from the resources sector.

Agricultural sector

The Great Southern region is the second largest agricultural producer in Western Australia. This section outlines the key components of the agricultural sector in the region and the impact it has on the State and regional economy.

The main source of information about the sector is provided by the ABS Agricultural Census. The most recent Census was conducted in June 2011. Given the above situation, this section is based on information and statistics from other sources and from earlier timeframes.

The Global Financial Crisis, export and animal health issues, the high Australian dollar and the dry climate conditions have added to the usual volatile conditions surrounding the sector. Therefore, previous economic patterns may not hold for the current situation.

Value of the agricultural sector

In 2010–11, the gross value of Western Australia's agricultural commodities was \$5.387 billion of which \$787 million was contributed by the Great Southern (see table 2.2). As a comparison, table 2.3 presents the figures for 2009–10 where the gross value of Western Australia's agricultural commodities was \$5.753 billion of which \$742.9 million was contributed by the Great Southern. In 2008–09 Western Australia's gross value was \$7.176 billion and the gross value in the Great Southern was \$1.1 billion.

Table 2.2: Value of agricultural commodities produced, Western Australia and Great Southern 2010–11

Total agriculture	Western Australia		Western Australia	
	Gross value \$M	Local value \$M	Gross value \$M	Local value \$M
Agriculture	\$5386.6	\$4974.6	\$786.9	\$732.9
Crops	\$3213.3	\$2962.5	\$403.7	\$378.7
Crops (excluding hay)	\$3109.6	\$2858.8	\$387.1	\$362.1
Horticulture – nurseries, cut flowers and cultivated turf	\$123.5	\$113.6	\$7.9	\$7.1
Horticulture – vegetables for human consumption	\$356.7	\$300.2	\$2.5	\$2.2
Horticulture – fruit	\$288.3	\$260.9	\$28.5	\$27.3
Horticulture – fruit – grapes	\$104.7	\$102.3	\$18.8	\$18.8
Livestock – livestock slaughtered	\$1410.2	\$1279.6	\$226.4	\$204.0
Livestock – livestock products	\$763.1	\$732.5	\$156.8	\$150.7

Source: ABS 2012, *Value of Agricultural Commodities Produced, Australia 2010–11*

Table 2.3: Value of agricultural commodities produced, Western Australia and Great Southern 2009–10

Total agriculture	Western Australia		Western Australia	
	Gross value \$M	Local value \$M	Gross value \$M	Local value \$M
Agriculture	\$5752.8	\$5321.4	\$742.9	\$691.1
Crops	\$3929.8	\$3641.4	\$418.4	\$393.1
Crops (excluding hay)	\$3787.4	\$3499.1	\$396.6	\$371.3
Horticulture – nurseries, cut flowers and cultivated turf	\$144.2	\$144.2	\$3.5	\$3.5
Horticulture – vegetables for human consumption	\$316.1	\$268.3	\$4.3	\$3.8
Horticulture	\$329.6	\$302.0	\$22.9	\$22.5
Horticulture – fruit – fruit excluding grapes	\$217.1	\$189.8	\$9.3	\$9.0
Livestock – livestock slaughtered	\$1220.1	\$1104.7	\$207.1	\$186.2
Livestock – livestock products	\$602.9	\$575.3	\$117.4	\$111.8

Source: ABS 2012, *Value of Agricultural Commodities, Australia 2009–10*

Value of agriculture, fisheries and forestry

Approximately 3 million hectares of land in the region is given over to the agricultural sector. In 2010–11 the total value of agricultural production in the Great Southern was \$787 million which represented 14.6% of Western Australia's agricultural production. The Great Southern region contributes 12.5% of the total value of crop production in Western Australia.

An analysis of the 2010–11 data on the value of agriculture reveals:

- crops contributed \$404 million or 51.3%;
- wheat was the highest value cereal crop (\$147.3 million or 18.6% of regional production);
- barley contributed \$76.4 million or 9.6%;
- livestock disposals had a value of \$226.4 million or 28.7% of regional production; and
- livestock products were valued at \$156.8 million or 19.9% (ABS 2011).

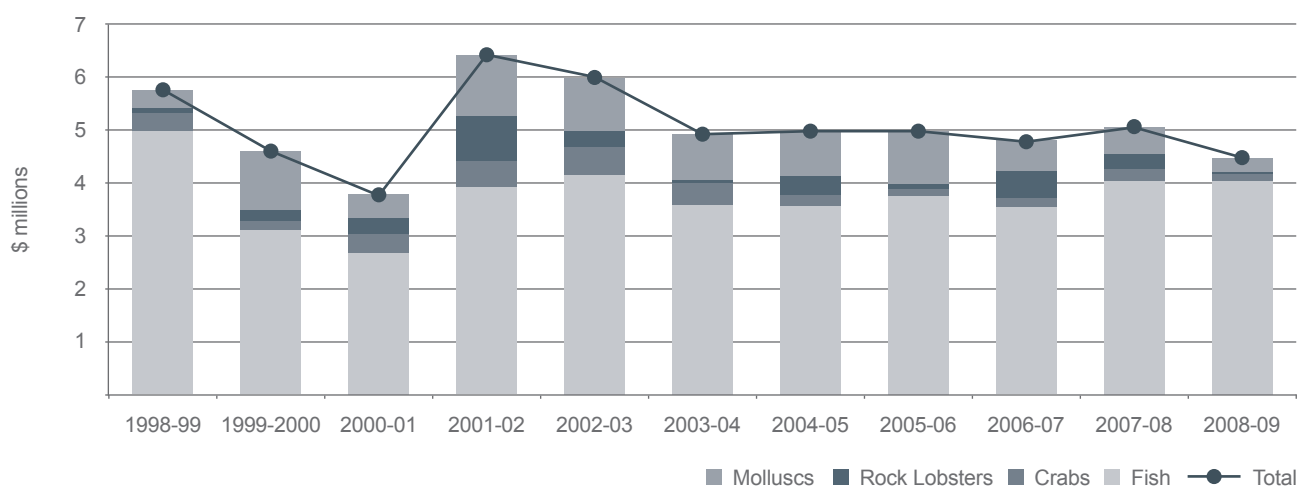
Fishing

The following information, provided by the Department of Fisheries and the Department of Regional Development and Lands gives an overview of fishing in the region for the years 1998–99 to 2008–09.

Figure 2.2 presents the decade long picture and indicates a stabilisation of the industry after a marked decline in 2003–04. Statistics of note are as follows.

- In 2008–09 there was a live weight catch of an estimated 3001 tonnes (\$4.5 million). This was a decrease on the 2007–08 catch of 11% on the estimated \$5 million that year.
- \$4 million or 90% of the 2008–09 live catch was finfish.
- The mollusc, rock lobster and crab catches have decreased over the years (Department of Regional Development and Lands, 2011).

Figure 2.2: Fishing catch estimated value 1998–99 to 2008–09



Source: Department of Regional Development and Lands, 2011 (based on Department of Fisheries data)

Aquaculture

Table 2.4 indicates that there was a steady increase in the value of aquaculture from 2005–06 to 2007–08 when it reached a peak of \$2.3 million. In 2008–09 it fell 24% to \$1.7 million.

Table 2.4: Estimated value of aquaculture 2005–06 to 2008–09

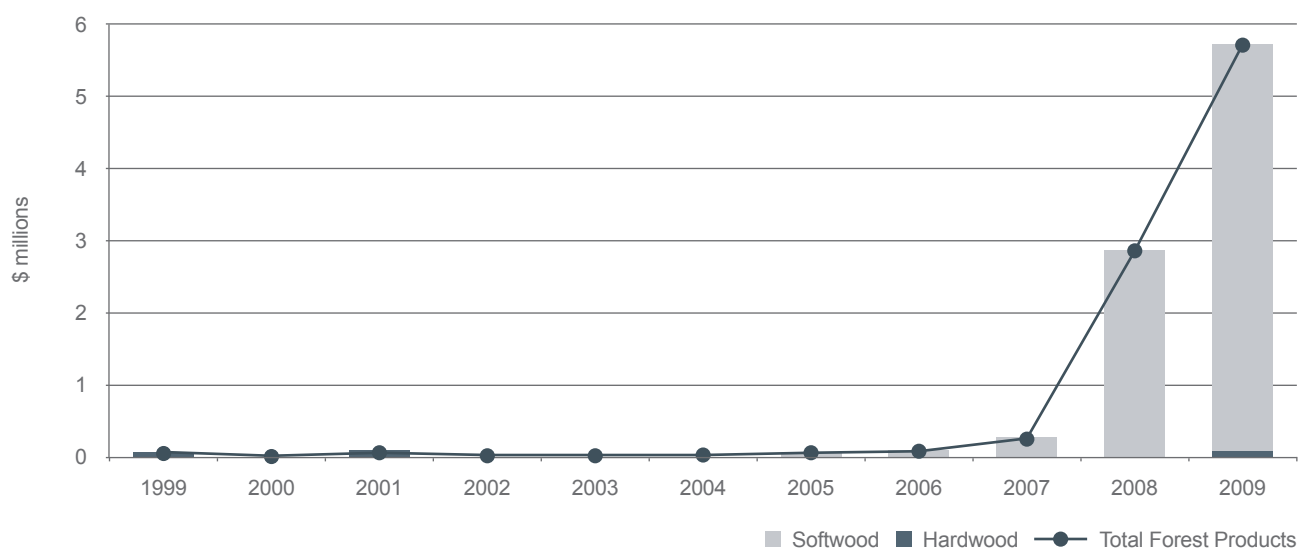
Estimated value (\$'000)				
	2005–06	2006–07	2007–08	2008–09
Finfish	\$91.5	\$134.6	\$639.6	\$774.2
Marron	\$135.5	\$158.2	\$155.8	\$159.1
Oysters	\$201.6	\$552.4	\$967.7	\$408.2
Mussels	\$108.0	\$90.6	\$76.6	\$81.0
Yabbies	\$394.0	\$552.4	\$424.0	\$292.4
Total	\$930.6	\$1488.3	\$2263.7	\$1714.8

Source: Department of Regional Development and Lands, 2011 (based on Department of Fisheries data)

Timber

The Great Southern produces 6% of Western Australia's timber production. In 2009 production peaked at 155 900 tonnes of resources or \$5.7 million. This harvest was predominately comprised of softwood. The increase in the harvest can be attributed to the maturing of the Tasmanian blue gum plantations and the thinning of pine plantations. Figure 2.3 presents the value of forestry production in the region for the period 1999–2009 (Department of Regional Development and Lands 2011).

Figure 2.3: Value of forestry production in the Great Southern 1999–2009

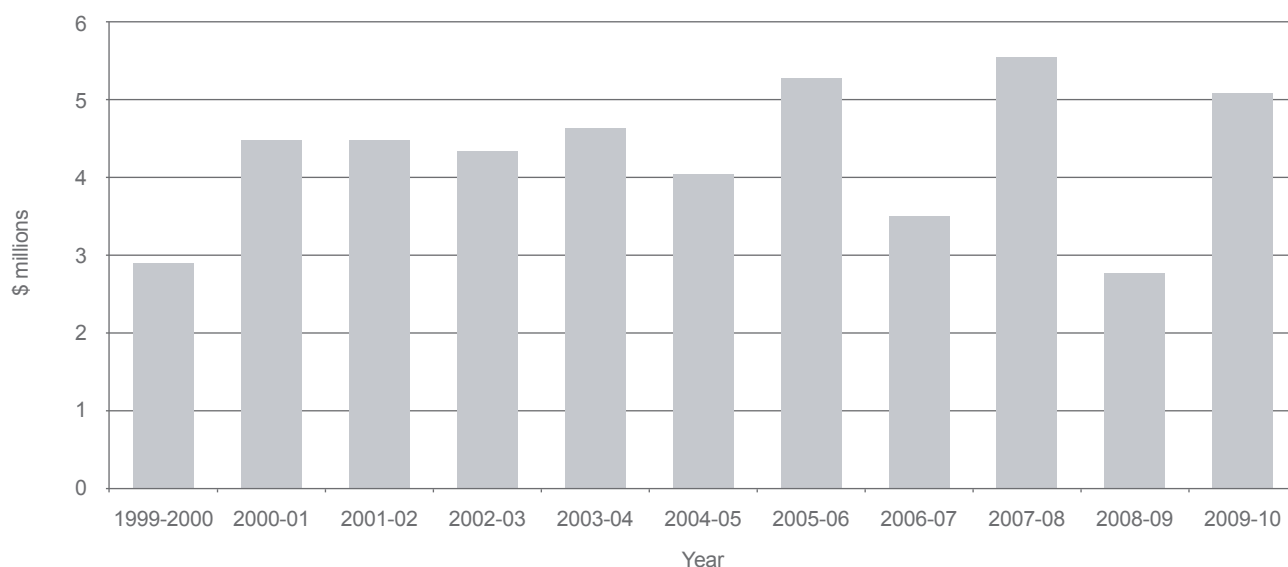


Source: Department of Regional Development and Lands, 2011 (based on Forest Products Commission data)

Resources sector

To date the Great Southern region has had a small mining sector which produced silica sand, spongolite and limesand. Silica sand is mined at Mindijup, approximately 40 km north east of Albany. A spongolite mine operates at Woogenellup near Mount Barker. Spongolite and silica were the only commodities being mined in 2007–08 and 2008–09 in the Great Southern region. The total production value almost halved over the period 2007–08 to 2008–09, down from \$5.3 million to \$2.8 million and in 2009–10 total production value had risen to \$5.1 million (Department of Regional Development and Lands 2012). There is also the potential for further opportunities in the resources sector which may have a positive impact on the region's economy. Mining and mineral production in the Great Southern for the period 1999–2000 to 2009–10 is presented in Figure 2.4.

Figure 2.4: Mining and mineral production in the Great Southern 1999–2000 to 2009–10



Source: Department of Regional Development and Lands, 2011 (based on Department of Mines and Petroleum data)

As with any regional area, the resources industry has the potential of providing significant economic benefits. Apart from the direct positive impacts from any new mining projects, there will be the need for a range of support services and ancillary industries. These will provide the opportunity for additional employment. Therefore, any future resources projects in the region will need to address the availability of a suitably skilled workforce. Available and affordable housing and land releases are also issues that will need further consideration.

Table 2.5 outlines Western Australia's mineral and petroleum resources in order of value for 2010–11.

Table 2.5: Western Australia's resources by value 2010–11

Commodity	Billion \$
Iron ore	\$57.3
Crude oil and condensate	\$12.4
LNG	\$8.7
Gold	\$8.2
Nickel	\$4.6
Alumina	\$4.0
Others	\$6.0
Total	\$101.2

Source: Department of Mines and Petroleum, 2012

Table 2.6 indicates the average commodity price movements between 2009–10 and 2010–11 in both US and Australian dollar terms.

Table 2.6: Commodity price movements between 2009–10 and 2010–11

Commodity	US\$	AUD\$
Iron ore	Up 76%	Up 59%
Tin	Up 63%	Up 45%
Nickel	Up 24%	Up 10%
Copper	Up 30%	Up 16%
Zinc	Up 8%	Down 3%
Crude oil	Up 25%	Up 12%
Alumina	Up 21%	Up 8%
Gold	Up 26%	Up 13%
Lead	Up 14%	Up 2%
Cobalt	Down 5%	Down 15%

Source: Department of Mines and Petroleum, 2012

Tourism

The Great Southern region is a popular tourist destination featuring many natural, cultural and historic attractions. As such, tourism has made and is making key contributions to economic growth. Tourism has the potential to boost income and employment across the region in a wide range of businesses. A contribution of this nature can have a significant multiplier effect and thus stimulate the local economy as well as its social wellbeing. It can fuel a need for a skilled workforce and appropriate accommodation, entertainment and leisure activities.

According to Tourism Western Australia, the average number of visitors to the Great Southern region in 2009/10/11 was 408 500. Of this number, intrastate visitors totalled 319 000 and international tourist arrivals were 45 200. Tables 2.7 and 2.8 provide more details on average visitor numbers and the purpose of the visits for the period December 2009–11.

Table 2.7: Visitor summary for the Great Southern Development Commission area

	Year ending 2009/10/11 Annual average visitors	Year ending 2009/10/11 Percentage
Estimated visitors		
Intrastate	319 000	78%
Interstate	44 300	11%
International	45 200	11%
Total	408 500	100%
Estimated visitor nights		
Intrastate	1 139 000	71%
Interstate	149 700	9%
International	324 800	20%
Total	1 613 500	100%
Average length of stay (Estimated nights)		
Intrastate	3.6	-
Interstate	3.4	-
International	7.2	-
Total	3.9	-

Source: Tourism Western Australia 2011, *Great Southern Development Commission Area Overnight Visitor Fact Sheet Years Ending December 20/9/10/11*

Table 2.8: Purpose of visit 2009/10/11¹

	Year ending 2009/10/11 Annual average visitors	Year ending 2009/10/11 Percentage
Estimated domestic visitors		
Holiday or leisure	196 700	54%
Visiting friends and relatives	108 300	30%
Business	39 700	11%
Other	20 300	6%
Estimated international visitors		
Holiday or leisure	38 200	85%
Visiting friends and relatives	5800	13%
Business	900	2%
Other	900	2%

Source: Tourism Western Australia 2012, *Great Southern Development Commission Area Overnight Visitor Fact Sheet Years Ending December 20/9/10/11*

A number of official information sources such as the Great Southern Development Commission, the City of Albany's *Economic Development Strategy* and the Katanning draft growth plan make reference to the importance of and the potential for tourism as a contributor to the regional economy. Strategies and projects past, present and future to promote tourism include:

- the newly completed Albany Entertainment Centre;
- the upgrade of the Albany waterfront, including a public marina and jetty, restaurants, shops and cafes. There are also opportunities for construction of a hotel and short stay accommodation;
- the Hidden Treasures of the Great Southern group produced its Tourism Toolkit, which provides support for small communities to develop tourism assets in a sustainable way by promoting group tours²;
- events in the region including the Perth International Arts Festival – Great Southern program, Taste Great Southern, Great Southern Wine and Food Festival, Harboursound Festival, Great Southern Adventure Race, Festival of the Sea and the Sprung Festival for readers and writers (Great Southern Development Commission 2012);
- the proposed upgrade of the Albany Airport; and
- the potential for nature based tourism ventures supported by sensitively designed developments in accommodation, adventure, tours and education.

¹Please note: Purpose of Visit is a multiple response question. Totals may not add up to 100%.

²For further information about Hidden Treasures of the Great Southern <http://www.hiddentreasures.com.au/>

Regional economic performance

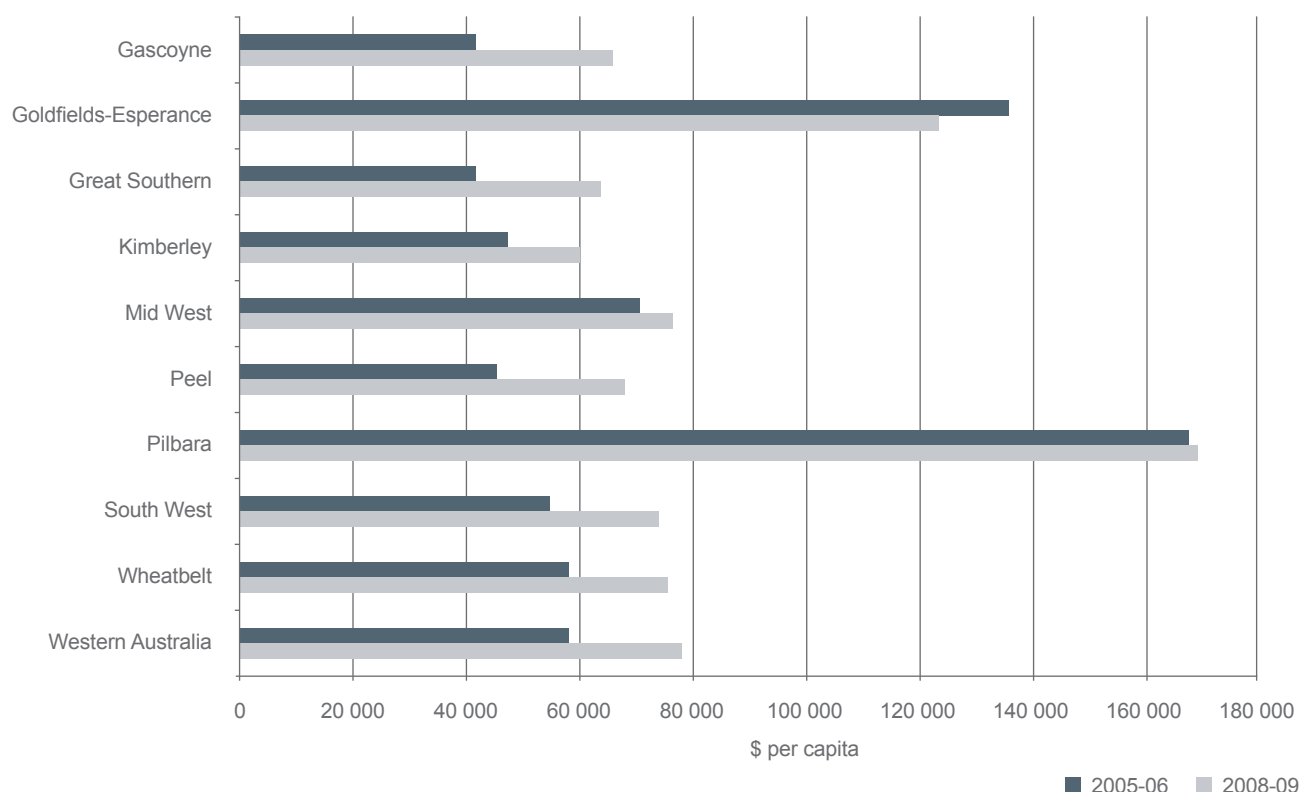
Gross regional product

While the Great Southern region is the State's second biggest contributor to the agricultural sector, in regard to overall Gross Regional Product (GRP) it's well behind the top performers, namely the Pilbara and the Goldfields-Esperance regions (see figures 2.5 and 2.6). These two high performing regions can attribute their performance to the buoyant mining sector.

In 2005–06, even though the region's overall performance was strong, per capita the Great Southern was the lowest ranked of all of Western Australia's regions (figure 2.5). In 2005–06, the Great Southern had per capita GRP of \$41 624. This was considerably less than the neighbouring Wheatbelt (\$57 926) and the South West (\$54 683) regions (Tonts, Davies and Haslam McKenzie 2008). It was also considerably lower than the Western Australian average of \$58 116. However, the relatively low per capita GRP is not inconsistent with other Australian regions with relatively high numbers of retirees and lifestyle migrants.

A full comparison of the regional economies can be found in table 2.9.

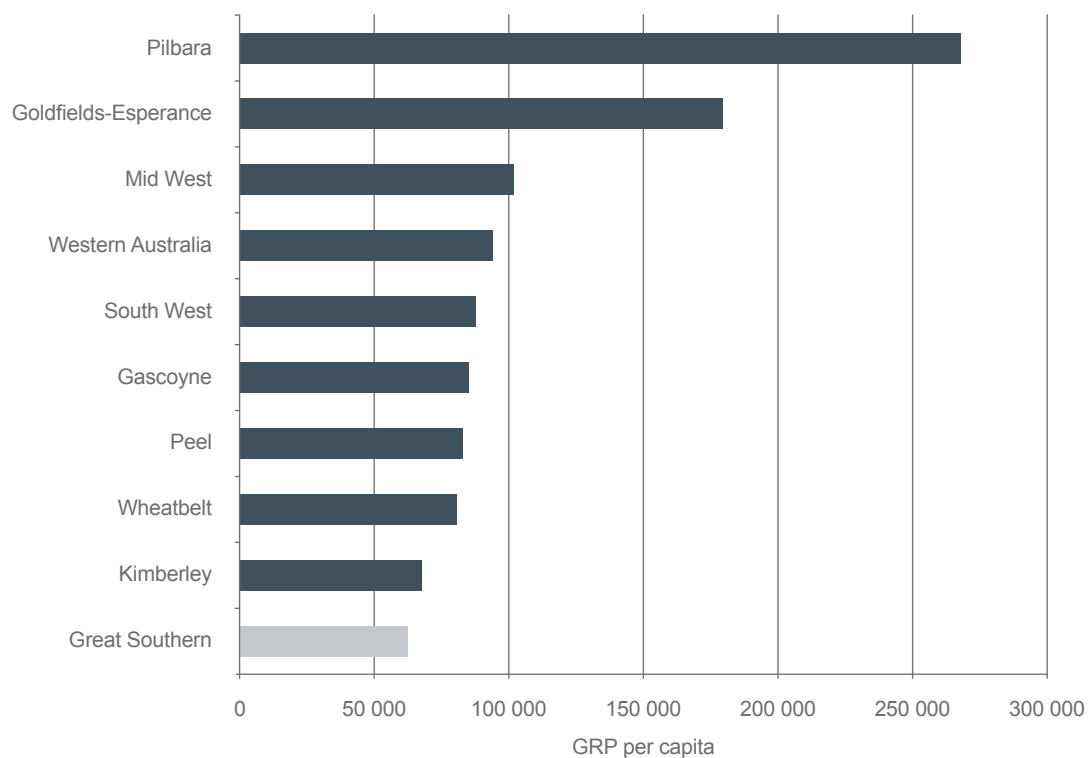
Figure 2.5: Comparison of regional economic performance 2005–06 to 2008–09



Source: Tonts and Davies, 2009; Department of Regional Development and Lands 2010

In 2010–11 the Great Southern had a per capita GRP of \$63 041 (figure 2.6), the lowest in the State. This was comparable to the 2008–09 figure of \$63 782. The region still lagged behind the Wheatbelt (\$80 308) and the South West (\$88 276). The Kimberley region which traditionally had a lower per capita GRP, had a GRP of \$67 152.

Figure 2.6: Gross Regional Product per capita – regional comparisons 2010–11



Source: ABS ERP Population and Department of Regional Development and Lands estimates of Gross Regional Product, 2011



Photo courtesy Katrina Bartley.

Table 2.9: Comparison of regional economic performance 2008–09

Gross Regional Product (2008–09)												
	Gascoyne	Goldfields - Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Gross Regional Product (\$ million)	638	7184	3664	2051	4114	6777	7814	11 299	5572	49 113	120,837	169 950
% of State total	0.4%	4.2%	2.2%	1.2%	2.4%	4.0%	4.6%	6.6%	3.3%	28.9%	71.1%	100.0%
GRP per capita (\$)	65 963	123 712	63 782	59 988	76 552	68 276	169 940	74 293	75 823	84 109	76 129	78 275

Source: Department of Regional Development and Lands

Tourism (2007–09)												
Based on three year average	Gascoyne	Goldfields-Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Total Western Australia*
N° visitors domestic ('000)	177.6	424.4	418.6	246.4	391.3	374.0	248.6	1 440.0	519.0	4 239.9	2 247.7	6 487.6
N° visitors international ('000)	53.6	42.6	51.6	44.9	49.2	23.0	36.3	104.9	37.9	444.0	639.5	1 083.5
Exp domestic (\$ millions)	161.2	190.7	187.0	221.7	196.3	124.3	207.4	551.2	160.6	2 000.3	1 100.3	3 100.3
Exp international (\$ millions)	35.4	31.8	28.2	53.8	32.9	20.4	41.5	69.1	39.1	352.3	1 319.7	1 672.0

Source: Tourism WA with further estimates by the Department of Regional Development and Lands. Totals may not add due to rounding.
 *Sum of regional averages

Table 2.9: Comparison of regional economic performance 2008–09

Agriculture (2008–09)												
	Gascoyne	Goldfields - Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Total agricultural production (\$)	77 684 883	587 261 522	1 102 507 402	186 745 504	871 814 457	129 361 820	67 094 134	624 000 501	3 154 066 537	6 800 536 760	375 646 982	7 176 183 742
% of State total	1.1%	8.2%	15.4%	2.6%	12.1%	1.8%	0.9%	8.7%	44.0%	94.8%	5.2%	100.0%
Crops and pastures (\$)	41 924 872	469 519 888	719 867 768	47 711 028	759 675 214	52 190 659	779 527	348 531 523	2 497 438 365	4 937 638 844	293 349 765	5 230 988 609
% of State total	0.8%	9.0%	13.8%	0.9%	14.5%	1.0%	0.0%	6.7%	47.7%	94.4%	5.6%	100.00%
Livestock disposals (\$)	31 211 758	87 228 663	263 028 610	139 034 248	81 388 663	66 424 846	66 314 607	100 598 734	421 542 525	1 256 772 654	63 685 848	1 320 458 502
% of State total	2.4%	6.6%	19.9%	10.5%	6.2%	5.0%	5.0%	7.6%	31.9%	95.2%	4.8%	100.0%
Livestock products (wool, milk, eggs and honey) (\$)	4 548 253	30 512 971	119 611 024	228	30 750 580	10 746 315	-	174 870 244	235 085 647	606 125 262	18 611 369	624 736 631
% of State total	0.7%	4.9%	19.1%	0.0%	4.9%	1.7%	0.0%	28.0%	37.6%	97.0%	3.0%	100.0%
Agricultural land area (Ha)	10 700 721	15 989 812	3 017 264	12 651 837	27 423 470	173 853	11 834 435	603 133	11 170 220	93 564 744	81 141	93 645 885
% of State total	11.4%	17.1%	3.2%	13.5%	29.3%	0.2%	12.6%	0.6%	11.9%	99.9%	0.1%	100.0%
Number of establishments	202	596	2159	144	947	676	66	2738	4210	11 738	921	12 659
% of State total	1.6%	4.7%	17.1%	1.1%	7.5%	5.3%	0.5%	21.6%	33.3%	92.7%	7.3%	100.0%

Source: Australian Bureau of Statistics

Table 2.9: Comparison of regional economic performance 2008–09

Forestry (2008–09)												
	Gascoyne	Goldfields - Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Total production (\$ value)	0	9000	5 691 000	0	0	7 820 000	0	69 267 000	10 000	82 797 000	10 339 000	93 136 000
% of State total	0.0%	0.0%	6.1%	0.0%	0.0%	8.4%	0.0%	74.4%	0.0%	88.9%	11.1%	100.0%
Hardwood production (\$ value)	0	2000	72 000	0	0	6 782 000	0	36 488 000	10 000	43 354 000	1 214 000	44 568 000
% of State total	0.0%	0.0%	0.2%	0.0%	0.0%	15.2%	0.0%	81.9%	0.0%	97.3%	2.7%	100.0%
Hardwood production (tonnes)	0	100	800	0	0	147 000	0	464 800	700	613 400	16 800	630 200
% of State total	0.0%	0.0%	0.1%	0.0%	0.0%	23.3%	0.0%	73.8%	0.1%	97.3%	2.7%	100.0%
Softwood production (\$ value)	0	7000	5 619 000	0	0	1 038 000	0	32 779 000	0	39 443 000	9 125 000	48 568 000
% of State total	0.0%	0.0%	11.6%	0.0%	0.0%	2.1%	0.0%	67.5%	0.0%	81.2%	18.8%	100.0%
Softwood production (tonnes)	0	200	155 100	0	0	17 400	0	641 800	0	814 500	191 900	1 006 400
% of State total	0.0%	0.0%	15.4%	0.0%	0.0%	1.7%	0.0%	63.8%	0.0%	80.9%	19.1%	100.0%

Source: (Former) Forest Products Commission

Table 2.9: Comparison of regional economic performance 2008–09

Manufacturing (2006–07)												
	Gascoyne	Goldfields- Esperance	Great South- ern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Locations	28	186	269	93	178.02	347	104	734	288	2227	7754	9982
% of State total	0.3%	1.9%	2.7%	0.9%	1.8%	3.5%	1.0%	7.4%	2.9%	22.3%	77.7%	100.0%
Number of employees	134	1719	1345	274	969	3372	577	7626	1191	17 207	57 115	74 319
% of State total	0.2%	2.3%	1.8%	0.4%	1.3%	4.5%	0.8%	10.3%	1.6%	23.2%	76.9%	100.0%
Turnover (\$ million)	26.8	759.0	351.0	59.0	285.7	2 545.4	2 277.0	2 731.7 5	19.0	9 554.5	35 493.0	45 047.5
% of State total	0.1%	1.7%	0.8%	0.1%	0.6%	5.7%	5.1%	6.1%	1.2%	21.2%	78.8%	100.0%

Source: Australian Bureau of Statistics and the Department of Regional Development and Lands

Fishing (2008—09)												
	Gascoyne	Goldfields -Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Total catch by value (\$ '000)	45 676	10 852	4 478	8 666	99 653	5 719	9 545	6 048	58 881	249 518	30 454	279 972
% of State total	16.3%	3.9%	1.6%	3.1%	35.6%	2.0%	3.4%	2.2%	21.0%	89.1%	10.9%	100.0%
Total catch by weight (tonnes)	7545	1120	3001	1778	4298	364	2264	1273	2396	24 039	1386	25 425
% of State total	29.7%	4.4%	11.8%	7.0%	16.9%	1.4%	8.9%	5.0%	9.4%	94.5%	5.5%	100.0%

Source: Department of Fisheries

Table 2.9: Comparison of regional economic performance 2008–09

Building and construction (2009–10)												
	Gascoyne	Goldfields-Esperance	Great South-ern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt	Regional WA	Perth	Western Australia
Total approvals value (\$'000)	48 395	201 885	243 249	346 978	371 892	618 889	1 080 729	873 351	285 189	4 070 557	9 036 637	13 107 194
% of State total	0.4%	1.5%	1.9%	2.6%	2.8%	4.7%	8.2%	6.7%	2.2%	31.1%	68.9%	100.0%
Total non-residential approvals (\$'000)	15 321	105 108	78 030	178 355	185 377	147 677	790 660	223 129	129 130	1 852 787	4 281 588	6 134 375
% of State total	0.2%	1.7%	1.3%	2.9%	3.0%	2.4%	12.9%	3.6%	2.1%	30.2%	69.8%	100.0%
Residential building approvals (\$'000)	33 074	96 776	165 219	168 623	186 517	471 215	290 066	650 223	156 057	2 217 770	4 755 053	6 972 823
% of State total	0.5%	1.4%	2.4%	2.4%	2.7%	6.8%	4.2%	9.3%	2.2%	31.8%	68.2%	100.0%
Average residential building approval (value)	\$389 106	\$314 208	\$266 482	\$374 718	\$289 623	\$221 853	\$457 517	\$256 599	\$269 064	\$277 951	\$277 457	\$277 614

Source: Australian Bureau of Statistics

Table 2.9: Comparison of regional economic performance 2008–09

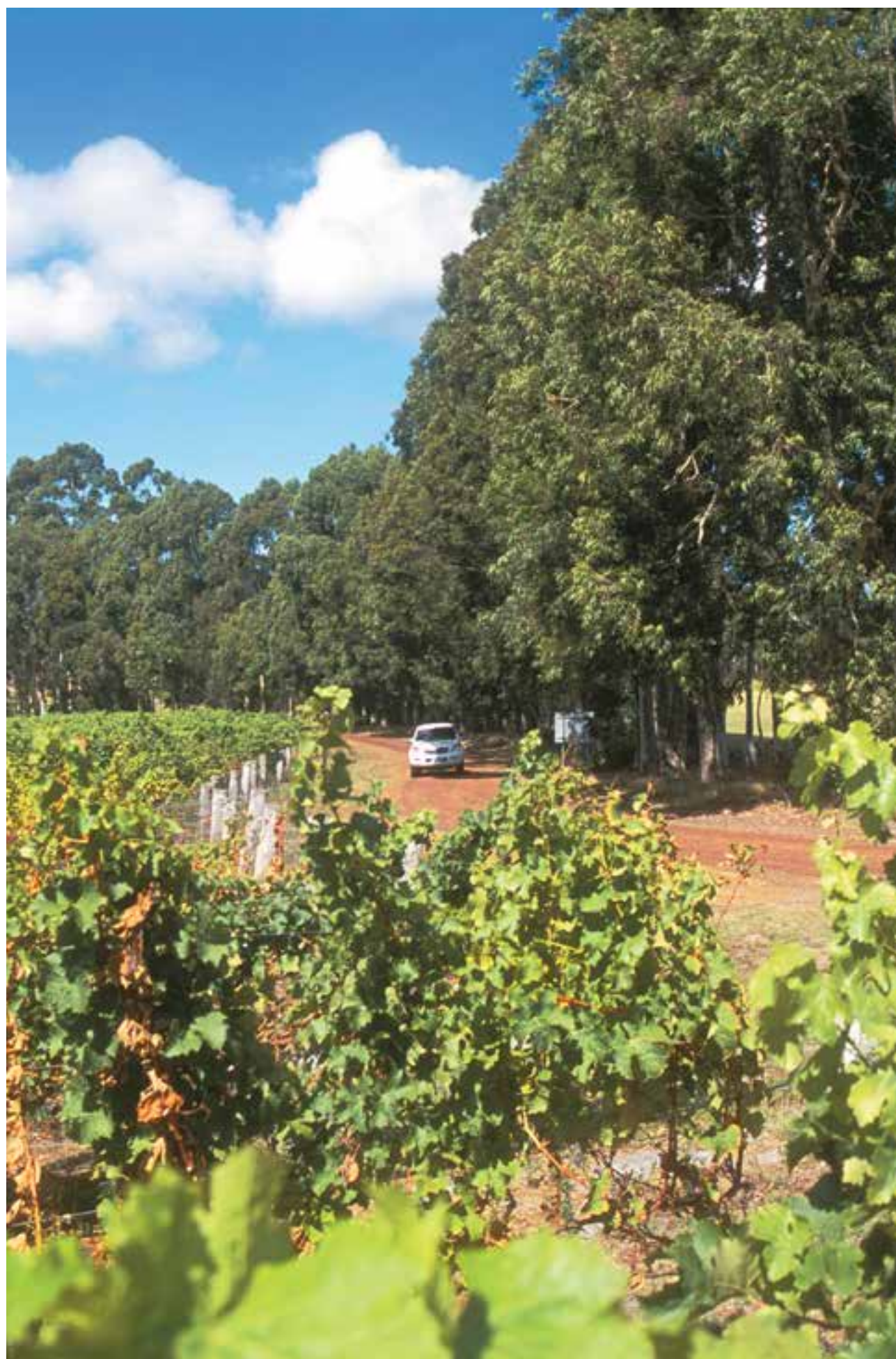
Retail (2008–09)									
	Gascoyne	Goldfields-Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt
Estimated retail turnover (\$ millions)	97.0	653.6	575.6	378.3	590.4	919.8	490.0	1 605.7	533.1
% of State total	0.4%	2.6%	2.3%	1.5%	2.3%	3.6%	1.9%	6.3%	2.1%
								23.0%	77.0%
									25 435.9
									100.0%

Source: Based on ABS State Retail Turnover. Regional estimations by RDL

Mining (2008–09)									
	Gascoyne	Goldfields - Esperance	Great Southern	Kimberley	Mid West	Peel	Pilbara	South West	Wheatbelt
Value (\$ million)	110.3	6 312.2	2.8	729.1	2 192.4	2 518.5	34 099.0	1 964.6	1 315.1
% of State total	0.2%	8.9%	0.0%	1.0%	3.1%	3.5%	47.8%	2.8%	1.8%
								29.9%	98.9%
									73.5
									71 310.5
									100.0%

Source: Department of Mines and Petroleum with further estimates by the Department of Regional Development and Lands *Regional sub-totals exclude petroleum

Sources: Department of Regional Development and Lands, 2010 (based on ABS data, 2010)



Industry structure

Table 2.10 shows location quotients for industry sectors across the Great Southern region in 2011. Location quotients (LQs) are a simple means of determining which sectors can be regarded as forming the economic base of an area. A quotient greater than 1.0 means that the area's labour force is usually biased towards that particular group, while a quotient of 2.0 means that the area has twice as many people in a given sector as expected. A quotient of 0.5 means half as many³.

It is evident that agriculture, forestry and fishing provide the foundation of the regional economy. This industry group is particularly dominant in Pallinup with an LQ of 14.4. The only other industry groups of note in Pallinup are wholesaling, with a much lower LQ of 1.3 and education and training with a LQ of 1.0. Agriculture, forestry and fishing are also the most important sector in King. However, it can be seen from table 2.10 that the sub-division is less dependent on these industries than Pallinup. Other industries in King with LQs greater than 1.0 include:

- retail trade (1.2);
- construction (1.1); and
- education and training (1.1).

The relatively high LQs in a number of these sectors are characteristic of regional centres. Albany clearly plays an important role in both King and the wider regional economy (Tonts, Davies and Haslam-McKenzie 2008).



³Calculated as: $LQ_{ir} = (E_{ir}/E_r)/(E_{in}/E_N)$. Where: E_{ir} = employment in sector i in region r; E_r = total employment in region r; E_{in} = employment in sector i in the national economy; E_N = employment in the national reference economy.

Table 2.10: Location quotients by industry group in the Great Southern region, 2011

Industry group	King	Pallinup
Agriculture, forestry and fishing	3.9	14.4
Mining	0.7	0.6
Manufacturing	0.8	0.7
Electricity, gas and water supply and waste services	1.0	0.8
Construction	1.1	0.5
Wholesale trade	0.7	1.3
Retail trade	1.2	0.7
Accommodation and food services	1.0	0.5
Transport, postal and warehousing	0.8	0.8
Information, media and telecommunications	0.4	0.1
Finance and insurance services	0.4	0.3
Rental, hiring and real estate services	1.0	0.3
Professional, scientific and technical services	0.5	0.3
Administrative and support services	0.9	0.4
Public administration and safety	1.0	0.9
Education and training	1.1	1.0
Health care and social assistance	1.0	0.6
Arts and recreation services	0.7	0.2
Other services	1.0	0.7
Not stated/Inadequately described	0.8	1.3

Source: ABS 2012, 2011 Census

Business structure

Not surprisingly, the majority of businesses in the Great Southern are in agriculture, forestry and fishing. Construction; rental, hiring and real estate; and retail also have a large number of businesses. Table 2.11 presents a breakdown of businesses by industry sectors for the region.

Table 2.11: Businesses according to industry sector in the Great Southern to June 2011

Industry sector	Number of businesses
Agriculture, forestry and fishing	2549
Construction	1000
Rental, hiring and real estate services	634
Retail trade	458
Professional, scientific and technical services	391
Transport, postal and warehousing	290
Manufacturing	261
Finance and insurance services	254
Other services	238
Accommodation and food services	237
Health care and social assistance	190
Wholesale trade	146
Administrative and support services	141
Not classified	86
Education and training	72
Arts and recreation services	44
Information, media and telecommunications	22
Mining	18
Electricity, gas and water supply and waste services	15
Public administration and safety	3
Total number of businesses	7049

Source: ABS 2012, Counts of Australian Businesses, including entrances and exits

In 2011 businesses in agriculture, forestry and fishing dominated across the region in both the sub-divisions. They represented 27.3% of businesses in King and 59.2% in Pallinup. The Great Southern is dominated by small and medium enterprises. For example, in King in 2011, the majority of businesses (65.6%) were sole traders and 84.3% were small businesses (less than 20 employees). In Pallinup there were 1959 businesses of which 1148 (58.6%) were sole traders. This business structure within the region and within the sub-divisions is common to similar regions across Australia. That is, farming/primary production businesses tend to dominate with a range of small to medium businesses providing services to the sector and the general population.

The King sub-division has a more diverse and growing economy which is reflected in the number, size and range of businesses. Pallinup, with its larger dependence on farming/primary production, may experience stagnation or marginal contraction as individual farms are amalgamated and expanded⁴.

The Great Southern region is a popular tourist destination. Therefore, it is somewhat surprising that in 2011, there were only 237 businesses or 3.4% in accommodation and food services. In 2009, there was 253 businesses in the same industry. Over the past 4–5 years this may have been influenced by the flow on effects of the global financial crisis with people reassessing their holiday plans. It is also anticipated that more recent low cost international flights have impacted on the number of visitors to the region. In the future, growth in the resources sector could have a significant impact on demand for accommodation, cafes and restaurants (Tonts, Davies and Haslam-McKenzie 2008).

Income distribution

An indicator of the performance of the Great Southern economy is the income received by residents. In terms of the cost of labour, higher than average incomes can indicate the strength of the economy. It also demonstrates that the premium employers are willing to pay workers for remaining in a given location/industry. More generally, the benefits of higher wages need to be viewed in light of the relative cost of living within a region.

One of the major issues facing the Great Southern in attracting and retaining labour is the ability to pay competitive salaries and wages. In general, incomes in the Great Southern are lower than those being earned elsewhere. The region, generally, has a lower income profile than the national average. This is largely due to the fact that the incomes earned in the Great Southern tend to reflect the structure of the economy. With the high level of dependence on agriculture, wages tend to be lower than in regions dependent on other industries, particularly mining. It should also be noted that the high proportion of retirees and sea and tree changers in the region, particularly in the King sub-division, does influence the income tables (Haslam McKenzie, Tonts, and Davies 2008 and DEEWR [n.d])

⁴The 2011 data was collected from the new statistical areas. An approximate alignment of the new areas and the two previous subdivisions was made to arrive at these figures.

In 2011 the median weekly household income in Western Australia was \$1415. In Pallinup the median weekly income was \$937 per household and in King it was \$1012, much lower than the State median.

Table 2.12 compares the median weekly household incomes according to the 2011 Census using the new statistical areas.

The incomes in the Great Southern are largely a reflection of the structure of the economy. As identified earlier, the region has a high level of dependence on agriculture, which is an industry that experiences significant cost, price and profit pressures as well as environmental constraints. Even though tourism may have a growing presence in the regional economy, particularly in King, it is unlikely to help redress the issue. In general, tourism is not normally recognised as a high wage and salary industry (Tonts, Davies and Haslam-McKenzie 2008).

Table 2.12: Median weekly household income in the Great Southern, 2011

Statistical Area	Weekly income (\$)
King (equivalent)	
Albany	\$908
Albany region	\$1118
Bayonet Head – Lower King	\$1225
Denmark	\$847
Little Grove – Elleker	\$1227
McKail – Willyung	\$1029
Plantagenet	\$888
Pallinup (equivalent)	
Gnowangerup	\$973
Katanning	\$943
Kojonup	\$895
Western Australia	\$1415

Source: ABS QuickStats, 2012

Personal income

In 2011, 54.5% of Great Southern region residents aged 15 years and over had a gross weekly personal income of \$400 or more. This compares with 58% for Western Australia as a whole.

Household income

In 2011, 50.3% of all households in the Great Southern region had a gross weekly household income of \$1000 or more. This compares with 55% for Western Australia as a whole.

Please note that gross household income does not take into account differences in household size or composition.

Taxation

The number of people paying income tax in the Great Southern region decreased from 24 826 in 2006 to 23 737 in 2009. Over this period, average taxable income increased from \$39 265 to \$49 670. The average taxable income for the State in 2006 was \$48 691 and \$62 434 in 2009.

Issues for consideration in regard to offering competitive salaries and wages include:

- inter-regional competition for labour, with some employees relocating to higher wage regions or choosing these ahead of the Great Southern as a place of work/residence;
- Great Southern enterprises/employers find it difficult to offer the wages/salaries provided in regions such as the Pilbara largely because the structure of the economy is vastly different and the scale of individual businesses and projects are generally smaller; and
- attempting to compete with wages elsewhere erodes profits and the viability of enterprises, further weakening the regional economy.

Dwelling approvals

A useful indicator of the performance of a local economy is the number of dwelling approvals. This not only indicates the level of domestic construction activity, but can be used as a de facto measure of economic confidence. Typically, areas with low levels of dwelling approvals also tend to have lagging economies, while high rates of approval indicate stronger economic performance and confidence in the future. Moreover, dwelling approvals can be a useful pointer towards future population change, since new dwellings are often a response to migration driven demand. While this can be influenced by factors such as changing household size and the replacement of existing housing stock, very high rates of dwelling approval are often associated with in-migration.

The number of dwelling approvals in the Great Southern region was relatively stable between 2005–06 and 2006–07. However, it decreased in the periods 2007–08 and 2008–09 in line with the onset of the global economic downturn. Approvals in the period ending June 2010 increased by 37%, from 391 to 620.

As shown in table 2.13, approvals remained relatively consistent in Pallinup across the period 2005–06 to 2009–10 with between 50 to 62 dwellings per year. The King sub-division approvals mirrored those in the region as a whole. That is, there was a small decrease from 2005–06 to 2006–07 and a sharper decrease in 2007–08 and 2008–09. In 2009–10 there was an increase of 230 approvals (40%). Not surprisingly this increase was most evident in the City of Albany.

Table 2.13: Dwelling approvals in the Great Southern region (2005–06 to 2009–10)

Sub-division	Statistical Local Area	2005–06	2006–07	2007–08	2008–09	2009–10
King						
	Albany – Central	177	168	105	73	155
	Albany – Balance	215	205	170	179	302
	Cranbrook	11	7	15	9	16
	Denmark	116	71	44	40	53
	Plantagenet	57	87	50	33	38
	Total	556	538	384	334	564
Pallinup						
	Broomehill-Tambellup	8	12	6	9	5
	Gnowangerup	1	0	0	4	5
	Jerrungup	15	10	9	16	21
	Katanning	22	30	21	14	17
	Kent	0	1	0	0	3
	Kojonup	12	4	3	5	4
	Woodanilling	3	5	11	9	1
	Total	61	62	50	57	56
Great Southern total		306	405	413	412	351

Source: ABS 2011, National Regional Profile Lower Great Southern

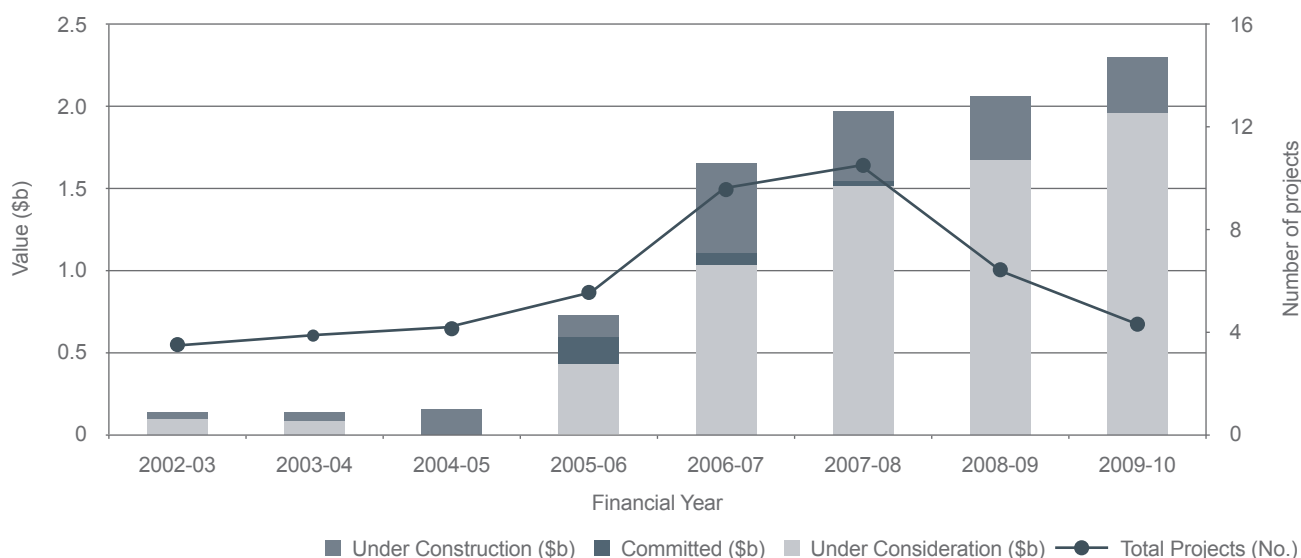
Regional development investment

This section will give an overview of project investments in the Great Southern region. In addition, it presents a reference to the investment in the region by the Australian Government. It provides details on the Royalties for Regions funding scheme which is at present the most significant form of investment in the regions.

Project investment

The total sum of costs for projects committed, under construction or under consideration in the Great Southern increased from \$55 million in 2002 to \$2064 million in 2009. The average cost of project investment in the Great Southern increased considerably in 2007 and in 2009. This could probably be attributed to the increased investment in mining projects. Since 2007–08 project investments have remained high and have increased. However, there have been fewer projects. Investment projects include the Albany Health Campus (\$170.4 million), Albany Entertainment Centre (\$70 million) and a UWA campus expansion (\$6 million) (Department of Regional Development and Lands 2011; Regional Development Australia 2009 and Department of Treasury [n.d.]). Figure 2.7 demonstrates the total cost of project investment for the period 2002–10.

Figure 2.7: Project investments in the Great Southern 2002–03 to 2009–10



Source: Department of Regional Development and Lands, 2011 (based on Access Economics – Investment Monitor data)

Royalties for Regions funding scheme

The Royalties for Regions funding scheme came into effect in late 2008. It has resulted in a significant shift in public sector funding for regional development in Western Australia. The policy has contributed to a significant increase in public sector investment. The equivalent of 25% of the State's royalties from mining and onshore petroleum is invested in regional areas. This investment underpins a range of new economic, social and other projects. The complexity of the scheme makes it difficult to report on the breadth of its investments or impacts. However, there are a number of elements of the scheme that provide insights into the scope of the policy.

The 2011–12 State Government Budget allocated a total of nearly \$1.5 billion to new regional projects through the Royalties for Regions scheme (see table 2.14). A total of \$422 million was allocated to cross regional schemes. The Great Southern region received an allocation of nearly \$77 million for investments across a range of schemes, including:

- the Country Local Government Fund – \$13.5 million;
- the Regional Community Services Fund – \$6.3 million; and
- Regional Infrastructure and Headworks Fund – \$57.2 million.

The expenditure of these funds is spread across much of the region. Not surprisingly, given their population size, there is a concentration of projects, and thus funding, in Albany, Katanning and Denmark. Katanning has also been designated by the Department of Regional Development and Lands as a SuperTown⁵.

Table 2.14: Royalties for Regions: Allocation of regional budgets (2011–12)

Region	Allocation (\$m)	% of allocations
Gascoyne	\$107.1	7.2%
Goldfields-Esperance	\$86.1	5.8%
Great Southern	\$76.9	5.2%
Kimberley	\$212.5	14.2%
Mid West	\$100.8	6.8%
Peel	\$33.8	2.3%
Pilbara	\$254.5	17.0%
South West	\$68.9	4.6%
Wheatbelt	\$130.2	8.7%
Cross regional	\$422.3	28.3%
Total	\$1493.0	

Source: Department of Regional Development and Lands, 2011

⁵For further information on SuperTowns see <http://www.rdl.wa.gov.au/royalties/Pages/SuperTowns.aspx>

It is likely to be the recipient of considerable investment in infrastructure and services in the future.

One of the aspects of the Royalties for Regions funding that can be readily disaggregated by location is the Country Local Government Fund allocations. These funds are allocated to individual country local governments and groups of country local governments to assist them to build and maintain their infrastructure.

Allocations made to the Great Southern region for 2011–12 through the Country Local Government Fund are presented in table 2.15. The allocation totalled \$4.9 million. Albany was the biggest beneficiary (\$868 939), followed by Katanning (\$601 437).

Table 2.15: Great Southern region – Country Local Government Fund allocations (2011–12)

Local Government	Allocation (\$ ex GST)	% of region's allocation
Albany	\$868 939	17.4%
Broomehill-Tambellup	\$374 889	7.5%
Cranbrook	\$335 415	6.7%
Denmark	\$596 697	11.9%
Gnowangerup	\$332 761	6.6%
Jerramungup	\$324 822	6.5%
Katanning	\$601 437	12.0%
Kent	\$324 995	6.5%
Kojonup	\$346 598	6.9%
Plantagenet	\$593 798	11.8%
Woodanilling	\$292 979	5.8%
Total	\$4 993 331	100%

Source: Department of Regional Development 2011, *Country Local Government Fund Allocations 2011–2012*

The Great Southern Development Commission administers the Regional Grants Scheme which is a competitive funding scheme for regional projects. Bids for this scheme can come from private and public sector organisations and the community for projects that contribute to aspects of the region's economic and social development.

As mentioned previously, the Royalties for Regions budget allocation 2011–12⁶ is around \$77 million. Table 2.16 outlines that investment.

⁶For further information on Regional Breakdowns for 2011-2012 budget, see <http://www.rdl.wa.gov.au/publications/Documents/Royalties%20for%20Regions%202011-12%20Budget-%20Regional%20Breakdown.pdf>

Table 2.16: Royalties for Regions project investment – Great Southern region 2010–11

Royalties for Regions fund and projects	Investment
Country Local Government Fund	\$13.5 million
Local Government – Local Infrastructure Asset Renewal and New Assets	\$8.5 million
Regional Groupings of Local Governments	\$5.0 million
Regional Community Services Fund	\$6.3 million
Regional community programs and schemes	
Country Aged Pension Fuel Card*	\$3.9 million
Community Resource Centres	\$1.2 million
Responsible Parenting Support Services	\$949 000
Aboriginal initiatives	
Clontarf Colleges	\$210 000
Regional Infrastructure and Headworks Fund	\$57.2 million
Southern Inland Health Initiative	
District Medical Workforce Investment Program	\$1.4 million
District Hospital Investment Program	\$338 000
Primary Health Centres Demonstration Program	\$65 000
Small Hospital and Nursing Post Refurbishment Program	\$27 000
Telehealth Investment Program	\$503 000
Residential Aged and Dementia Care Investment Program	\$50 000
Regional skills and training	
Regional Work Camp Enhancement	\$2.9 million
Regional health infrastructure	
Albany Hospital	\$20.3 million
Regional development – water and NRM initiatives	
Intensive Horticulture and Energy Efficiency Project	\$704 000
Regional infrastructure projects	
SuperTowns Development Project Fund	\$13.3 million
SuperTowns Development Planning Fund	\$917 000
Regional Mobile Communications Project	\$889 000
Community Safety Network	\$4.7 million
Housing for Workers	\$2.2 million
Bunbury to Albany Gas Pipeline	\$4.9 million
Regional Schools Plan – Denmark Senior High School	\$4.0 million

Source: Regional Budget Breakdown 2011–12, 2011

Regional Development Australia

Regional Development Australia is an Australian Government initiative that brings together all levels of government to enhance the development of Australia's regions. A national network of Regional Development Australia committees has been established to achieve this objective. The Regional Development Australia currently has 63 investment projects in the Great Southern. These investments range from upgrades to community facilities such as footpaths and toilets to the construction of a Rescue Boat Compound at Princess Royal Sailing Club (Department of Regional Australia, Local Government, Arts and Sport 2012).

Regional demography

Introduction

This section provides an overview of regional demographic trends in the Great Southern region. It focuses on total population trends, age and sex structure and population mobility. All of these trends provide insights not only into the broader economic and social changes affecting the region, but also aspects of the regional labour markets and workforce dynamics.

Demographic trends

On Census night 8 August 2006, 52 592 persons counted the region as their usual place of residence. Of these 50.1% were males and 49.9% were female. This was not dissimilar to the Australian breakdown of 49.4% (males) and 50.6% (females).

There were 1714 Aboriginal persons (this includes Aboriginal and Torres Strait Islander people) in the region on the night of the Census.

On Census night 9 August 2011, 55 357 persons counted the region as their usual place of residence. There was an almost equal number of men and women. This was similar to the Western Australian breakdown. There were 2096 Aboriginal persons (this includes Aboriginal and Torres Strait Islander people) who counted the region as their usual place of residence.

Table 2.17 shows the estimated population of the subdivisions and statistical local areas within the Great Southern region at the 2001, 2006 and 2011 Census. It shows modest growth in the King subdivision, in particular in Albany, Denmark and Plantagenet. Most of the areas in the Pallinup sub-division are characterised by a decline in population.

Table 2.17: Number of persons in the Great Southern region (2001, 2006 and 2011)⁷

Subdivision	Statistical Local Area	2001	2006	2011	% change 2001 -2011
King					
	Albany – Central	15 675	16 009	16 077	2.5%
	Albany – Balance	13 896	14 942	16 832	17.4%
	Cranbrook	1049	1098	1059	0.9%
	Denmark	4358	4380	5049	13.6%
	Plantagenet	4329	4287	4684	7.5%
	Total	39 307	40 716	43,701	10.0%
Pallinup					
	Broomehill-Tambellup	1124	1075	1110	-1.2%
	Gnowangerup	1521	1325	1274	-19.3%
	Jerramungup	1208	1092	998	-21.0%
	Katanning	4146	4127	4129	-0.4%
	Kent	628	547	499	-25.8%
	Kojonup	2145	2088	1882	-13.9%
	Woodanilling	382	390	390	2.0%
	Total	11 154	10 644	10 282	-8.4%
Great Southern	Total	50 461	51 360	53 983	6.5%

Source: ABS 2012, 2011 Census Time Series

⁷Based on place of enumeration

Table 2.18: Total population Great Southern by statistical area, 2011

Statistical area	Population
Albany	13 680
Albany Region	2997
Bayonet Head – Lower King	4260
Denmark	5194
Gnowangerup	2833
Katanning	4598
Kojonup	4193
Little Grove – Elleker	3274
McKail – Willyung	9440
Plantagenet	4883
Total	55 357

Source: ABS 2012, 2011 Census Basic Community Profiles

The 2012 report on population profiles and projects by the Western Australian Planning Commission estimated that the Great Southern region would experience significant population growth. An average annual growth rate (AAGR) of 1.2% is suggested. The AAGR for young people aged 0–19 years is approximately 0.5%, for the age groups 20–64 years it is approximately 0.9% and older people have a rate closer to 3.7%. Examples of population projection for the region are:

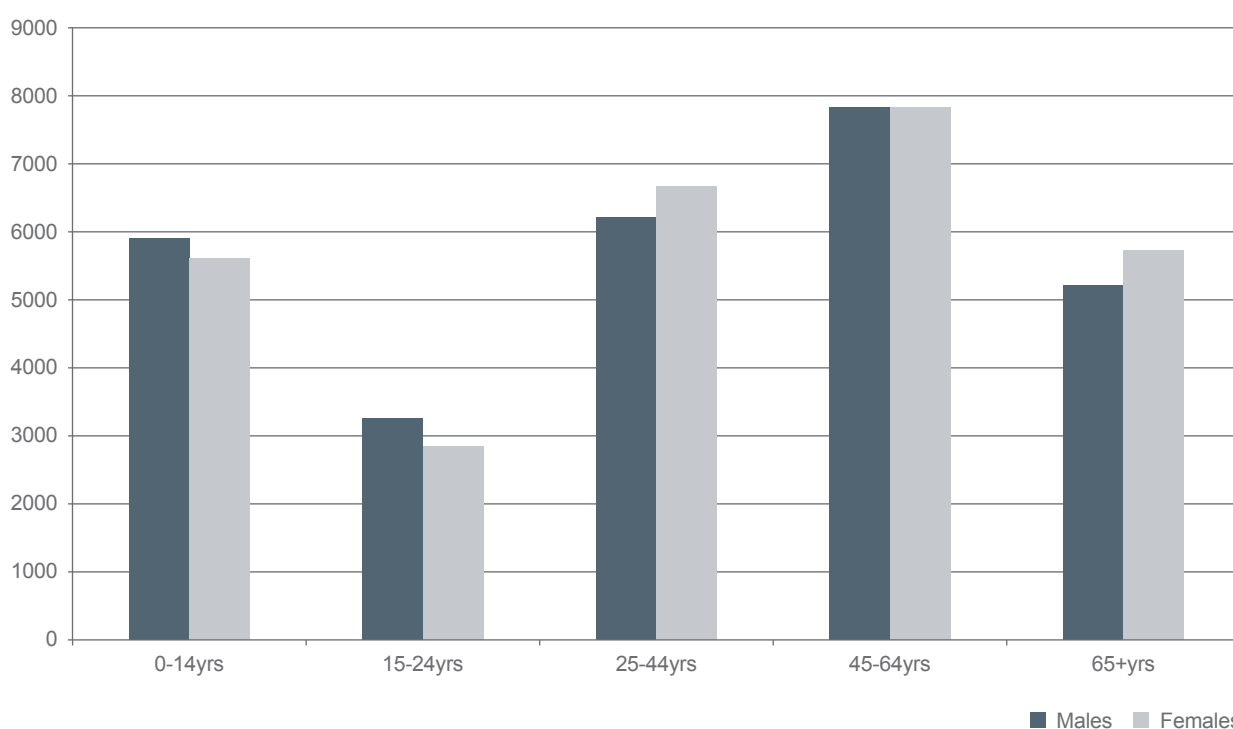
- 64 200 people by 2016;
- 67 400 people by 2021; and
- 70 500 people by 2026.

Age structure

At the time of the 2011 Census 15 668 people were in the 45–64 age cohort, representing 28.3% of the Great Southern region. Approximately 23.2% or 12 862 people were in the 25–44 age cohort. 20.7% of the population or 11 471 people were in the 0–14 age cohort. 30.1% of the population was aged over 55 years.

This is consistent with other coastal areas in Australia that have experienced strong in-migration by retirees and lifestyle migrants over recent decades (Burnley and Murphy 2004). This has two important implications for labour demand in the future. First, over the next decade or so, a relatively large proportion of the population will move into retirement, fuelling greater demand for replacement labour to fill the gaps left by retirees. Secondly, the older age structure will shape the local economy and service sector, with increasing demand likely in areas such as recreation and leisure services and health and social services. Figure 2.8 shows the age and gender structure for the region as a whole in 2011.

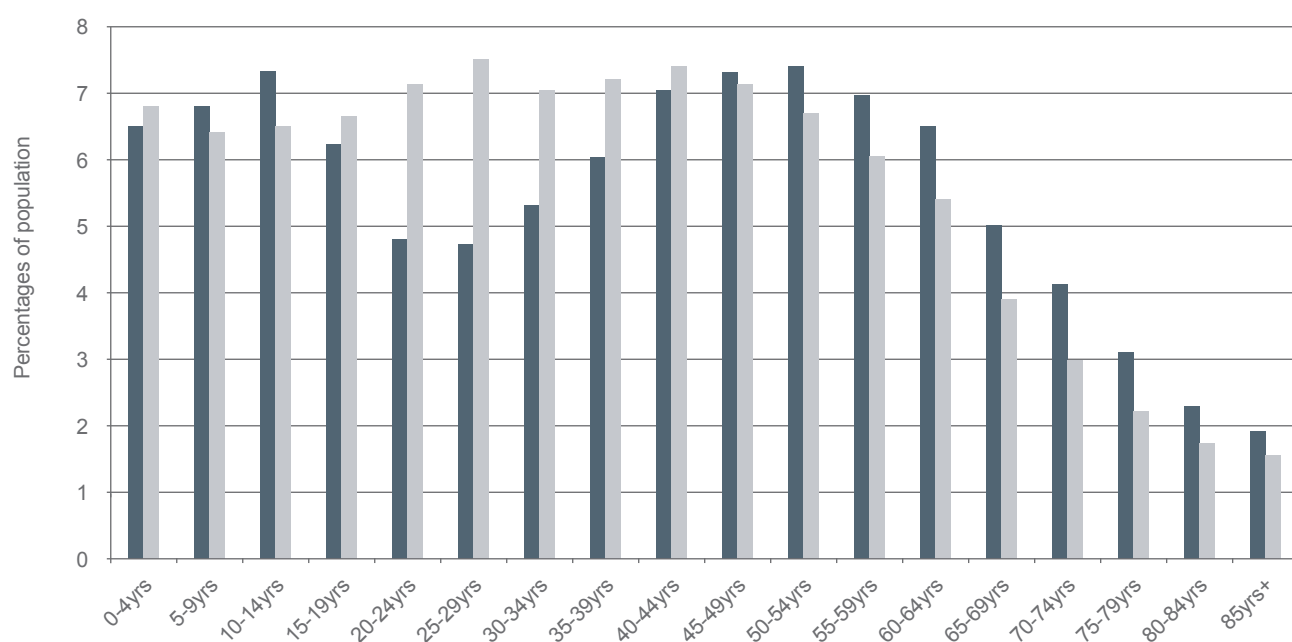
Figure 2.8: Age by gender in the Great Southern 2011



Source: ABS 2012, 2011 Census

Figure 2.9 compares the age structure of the region with that of Western Australia in 2011.

Figure 2.9: Age structure of the Great Southern and Western Australia by proportion of the population, 2011



Source: ABS 2012, 2011 Census

■ Great Southern ■ WA

Gender structure

In 2011, 49.8% of the region's population were male. Table 2.19 presents the population across each statistical area showing the percentage of males in each area. From the figures it can be seen that in each area there is a relative gender balance.



Table 2.19: Males as a percentage of population by statistical area, 2011

Statistical level 3	Statistical area	Population (males and female)	Males as percentage by statistical area
Albany	Albany	13 680	47.1%
	Albany Region	2997	51.1%
	Bayonet Head – Lower King	4260	49.6%
	Denmark	5194	49.1%
	Gnowangerup	2833	53.4
	Katanning	4598	50%
	Kojonup	4193	50.7%
	Little Grove – Elleker	3274	56.2%
	McKail – Willyung	9440	49%
	Plantagenet	4883	51.1%
	Albany Statistical Area Level 3	55 357	

Source: ABS 2012, 2011 Census

Population mobility

With regard to internal migration in the Great Southern between 2006 and 2011, both Pallinup and King had a relatively stable population. Approximately 61% of the Pallinup population were living at the same address in 2011 as in 2006. In King 54% were living at the same address. In Western Australia 49% of the population were living at the same address in 2006. Ten percent of King's population had moved address within the statistical area and in Pallinup 12% had relocated within the area. In 2011 29% of the population in King had been living or located outside the area and in Pallinup 20% of the population had been living or located elsewhere. See table 2.20 for population mobility statistics.

Table 2.20: Population mobility in the Great Southern, 2006–2011⁸

Statistical area	Pop ⁿ	Same address in 2006	Same SA2 in 2006; Different address	Different address in WA	Different address interstate	Overseas in 2006
King (equivalent)						
Albany	12 916	6678	1523	3221	303	553
Albany Region	2856	1787	140	721	47	36
Bayonet Head – Lower King	3995	2161	291	1127	75	139
Denmark	4906	2520	708	1193	109	108
Little Grove – Elleker	3140	1892	100	641	50	40
McKail – Willyung	8666	4558	870	2359	165	246
Plantagenet	4565	2621	503	902	61	116
Total	41 044	22 217	4135	10 164	810	1238
Pallinup (equivalent)						
Gnowangerup	2582	1609	315	397	52	56
Katanning	4240	2370	583	654	92	300
Kojonup	3846	2532	424	543	67	76
Total	10 668	6511	1322	1594	211	432

Source ABS 2012 Source: ABS 2012, 2011 Census

Comparative demographics

Tables in this section compare the population of the Great Southern with the surrounding regions, namely the South West, the Mid West and the Wheatbelt. Table 2.21 present the statistics according to the geographical regions. Figure 2.10 charts the 2010 population by the age distribution for each of the four regions. The graph, in particular, demonstrates the similarities in age breakdowns across the regions with the exception of the 55–59 age group in the South West. Please note that the figures in figure 2.10 may not total 100% due to rounding.

⁸Please note that in a number of instances usual place of residence was not recorded. Thus the number of responses may not equal the population total

Table 2.21: Comparative demographics 2006–11 – WA regions

Region	2006	2007	2008	2009	2010	2011
Great Southern	55 769	56 455	57 592	58 851	59 412	55 357
Mid West	51 855	52 678	53 882	54 972	55 584	53 657
South West ⁹	142 999	147 307	152 493	157 772	162 164	158 104
Wheatbelt ¹⁰	72 142	72 746	73 686	74 899	75 535	74 082

Sources: ABS National Regional Profiles 2006-2010, 2011; ABS 2011 Census, 2012

Figure 2.10: Comparative age structure 2010

Source: ABS National Regional Profiles 2006-2010, 2011

⁹2006-2010 ABS statistics without the population statistics for Boddington, Mandurah and Waroona. ABS Census 2011 had changes to the statistical boundaries that may be reflected in the drop on population.

¹⁰2006-2010 The Wheatbelt comprises the two ABS statistical divisions of the Midlands (northern Wheatbelt) and the Upper Great Southern. At the 2011 Census the Wheatbelt comprised the statistical areas of Wheat Belt North and Wheat Belt South

Regional labour market

Introduction

This section describes the Great Southern region's labour market. It considers the overall trends in employment and unemployment, as well as more specific locational and sectoral characteristics of the labour force. This includes an assessment of participation in the labour force, employment by industry sector, occupational structures, fly-in fly-out operations and the ageing of the workforce. It also examines the educational and skills base of the region.

Employment and unemployment trends

During the period 2002–11, the Great Southern workforce increased by 5522 people. During this same period the region's percentage of the State's workforce was relatively stable. This can be attributed to the growth in the total State workforce (table 2.22) (Regional Development Australia, 2009). In June 2012 the labour force dropped by 849.

Table 2.22: Estimated Great Southern labour force 2002–12

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Great Southern labour force 2002–12 (estimate)	28 661	28 465	27 165	27 043	30 522	30 159	30 938	32 650	33 096	34 183	33 334
% of State labour force	2.9%	2.8%	2.7%	2.6%	2.8%	2.7%	2.7%	2.7%	2.7%	2.6%	2.5%

Source: SALM 2009, 2002–2012 and Regional Development Australia

Current employment profiles

In November 2011 the ABS released the data for the National Regional Profile, 2006–10. The employment profile for Pallinup is presented in table 2.23 and the profile for King is presented in table 2.24. These tables offer a comparison with the labour force data from the ABS 2011 Census presented in table 2.25.

Table 2.23: Pallinup employment profile 2006–10

Estimates of unemployment – June quarter		2006	2007	2008	2009	2010
Unemployed persons	No.	222	170	234	207	308
Unemployment	%	3.0%	2.3%	3.0%	2.8%	4.3%

Source: ABS 2011, National Regional Profile, Pallinup, 2006–10

Table 2.24: King employment profile 2006–10

Estimates of unemployment – June quarter		2006	2007	2008	2009	2010
Unemployed persons	No.	1128	906	1110	1048	1155
Unemployment	%	4.9%	4.0%	4.7%	4.0%	4.5%

Source: ABS 2011, National Regional Profile, King, 2006–10

Table 2.25: Labour force status at 2011 Census

Statistical level 3	Statistical area	Employed	Unemployed	Total labour force	Percentage unemployed
Albany		24 880	1269	26 149	4.8%
King (equivalent)	Albany	5917	335	6252	5.3%
	Albany region	1556	72	1628	4.4%
	Bayonet Head – Lower King	1896	76	1972	3.8%
	Denmark	2242	113	2355	4.7%
	Little Grove – Elleker	1436	63	1499	4.2%
	McKail – Willyung	4223	232	4455	5.2%
	Plantagenet	2173	129	2302	5.6%
Pallinup (equivalent)	Gnowangerup	1496	46	1542	2.9%
	Katanning	1993	120	2113	5.6%
	Kojonup	1952	85	2037	4.1%
Western Australia		1 097 881	54 319	1 152 200	4.7%

Source: ABS 2012, 2011 Census Basic Community Profiles



Table 2.26: Comparative unemployment rates 2009–12

	Unemployment								Unemployment rate (%)						Labour force June 2012
	June 2009	Dec 2009	June 2010	Dec 2010	June 2011	Dec 2011	June 2012	June 2009	Dec 2009	June 2010	Dec 2010	June 2011	Dec 2011	June 2012	
Albany	784	910	834	954	1000	920	961	3.9	4.5	4.3	4.9	5.1	4.6	4.8	20 126
Broomehill	13	19	17	18	19	17	15	4.2	6.1	5.6	5.9	5.9	5.3	4.7	319
Cranbrook	19	21	19	26	39	25	31	2.4	2.6	2.4	3.3	4.8	3.1	3.8	813
Denmark	126	154	145	148	130	118	133	4.5	5.5	5.4	5.5	4.6	4.2	4.7	2814
Gnowangerup	26	33	35	45	56	43	50	2.5	3.2	3.5	4.5	5.4	4.1	4.8	1040
Jerramungup	11	13	11	9	11	8	10	1.3	1.5	1.3	1.1	1.2	0.9	1.1	886
Katanning	126	162	172	182	220	190	216	5.0	6.4	7.0	7.4	8.5	7.4	8.4	2575
Kent	2	3	4	3	3	3	5	0.4	0.6	0.9	0.7	0.6	0.6	1.0	480
Kojonup	1	30	35	41	44	40	44	1.4	2.0	2.4	2.8	2.9	2.6	2.9	1539
Plantagenet	141	166	157	142	196	154	174	4.9	5.8	5.6	5.0	6.7	5.3	5.9	2926
Tambellup	14	25	28	34	38	41	35	3.9	7.0	8.1	9.7	10.4	11.3	9.6	364
Woodanilling	3	5	6	5	9	7	8	1.0	1.7	2.1	1.7	3.0	2.3	3.0	301
Great Southern	1286	1541	1463	1607	1765	1566	1682	2.9	3.9	4.0	4.3	4.9	4.3	4.5	34 178
Western Australia	46 700	61 600	62 200	51 600	55 900	50 200	53 100	3.8	5.0	5.0	4.0	4.4	3.9	4.0	1 311 300
Australia	570500	648800	640900	586500	606900	601000	626000	5.0	5.6	5.5	4.9	5.1	5.0	5.2	12087800

Source: SALM Quarterly Reports, 2009-2012

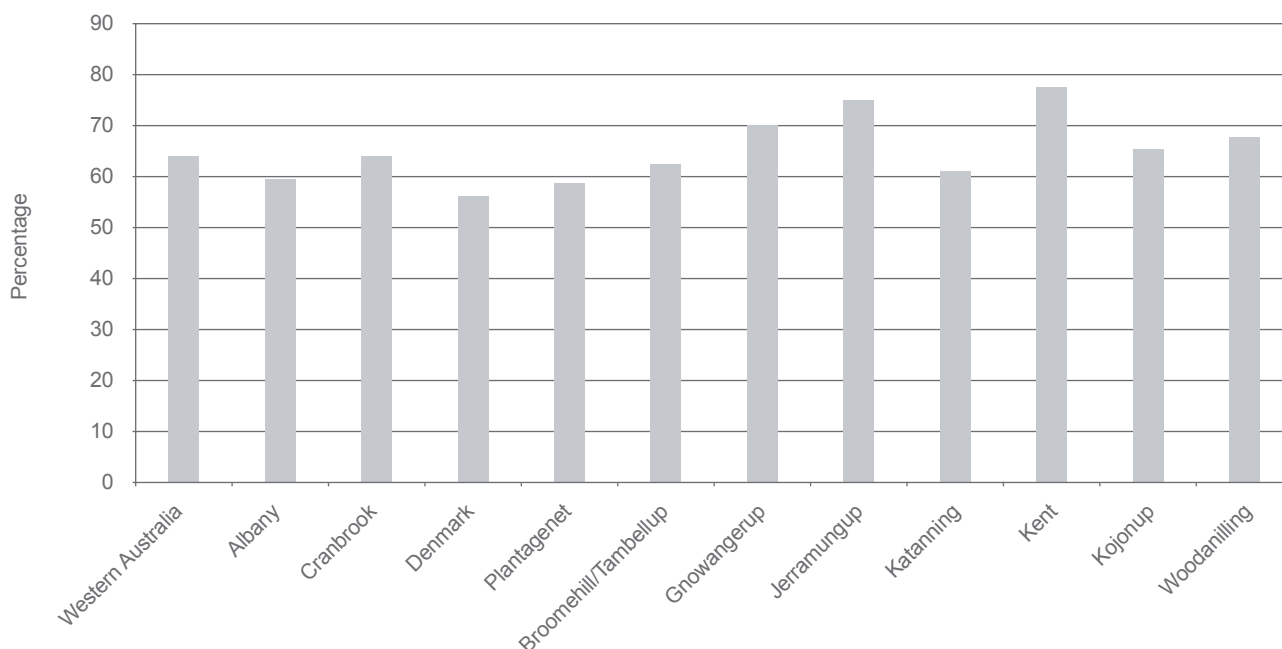
Figures released from SALM for the quarter ending June 2012 (table 2.26) indicated that the region's workforce numbered 34 178. This represents an increase of 18.5% since 1990–2000. For the period June 2009 to June 2010, the unemployment rate was lower than the State rate. Since December 2010 the region's unemployment rate has been higher than that of the State, reaching a peak of 4.9% in June 2011.

Participation in the labour market

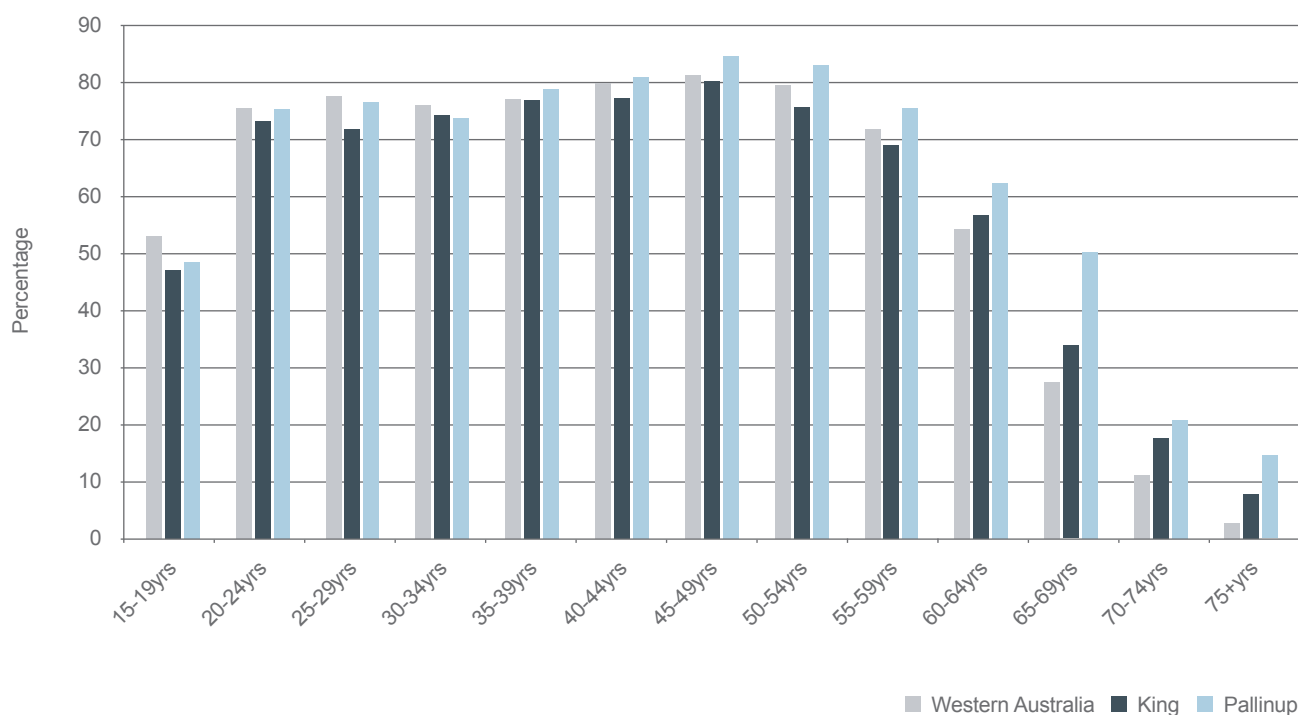
According to figures extracted from the 2011 ABS Census data, there is considerable variation in the labour force participation rates across the Great Southern (see figure 2.11). In King, participation rates were lower than the State average in both 2006 and 2011. This may suggest that there is some scope to better engage non-participants in the labour force. However, these figures may be influenced by the number of people seeking to retire to the area. It is not uncommon in retirement and lifestyle communities to find slightly lower participation rates than are experienced elsewhere.

As demonstrated in figure 2.12 Pallinup had much higher rates of participation than in Western Australia as a whole. In 2006 the rate was 74.4% and in 2011 it was 68%. While this was a drop of 6.4% it was still above the Western Australian rate of 63.8%. The reason for the decrease in participation between 2006 and 2011 is unclear. It has been suggested that it may be linked to the decline in agriculture leading to some members of the population withdrawing from active engagement in the labour force.

Figure 2.11: Labour force participation rates in the Great Southern, 2011



Source: ABS 2012, 2011 Census

Figure 2.12: Labour force participation in the Great Southern by age, 2011

Source: ABS 2012, 2011 Census

With regard to labour force participation, rates across different age cohorts in 2011 were as follows.

- In the main, the age ranges in the profile across King were close to the State. The age groups 15–29 years were slightly lower than the State average, at 63.9% compared with 68.5%. However, the 65+ age groups were higher than for Western Australia as a whole. This could be related to the increasing retirement and lifestyle communities.
- The level of participation in Pallinup was higher than of the State across the majority of the age groups. The 15–19 age group recorded a lower rate than the State average (48.5% compared with 52.8%) and the 30–34 age group was also slightly lower (73.6% compared with 76%). The 65+ age groups were significantly higher than the State average. The higher participation rates in the over 40 age groups are considered to be a reflection of the relative age of the agricultural labour force in Pallinup. Across Australia this element of the labour force is often older than in other sectors.

Employment and industry sector

According to the ABS in 2011, the agriculture, forestry and fishing sector employed the largest workforce. Across the region it employed 48.8% of the total workforce. This dominance was seen mainly in Pallinup with 39.9%. In King it comprised 8.9%. As can be seen from table 2.27 these figures are much higher than the Western Australian average of 2.4%.

In comparison to Pallinup, the King sub-division has a more diverse workforce. Apart from the agriculture, forestry and fishing sector, the other major employers were retail trade (13.8%) and health care and social assistance (13.1%). Education and training (10.2%) and public administration and safety (7.5%) demonstrated the strength of the services sector. Naturally, a key influence on the diversity is the presence of the regional centre of Albany. As agriculture, forestry and fishing dominates the workforce in Pallinup, the proportion of workers in other sectors is low. Retail trade (8.2%), education and training (8.6%) and manufacturing (6.4%) were the other relatively significant employers.



Table 2.27: Proportion of the labour force (%) in different industry sectors in the Great Southern, 2011¹¹

Industry sector	King	Pallinup	Western Australia
Agriculture, forestry and fishing	8.9%	39.9%	2.4%
Mining	0.3%	0.1%	6.4%
Manufacturing	7.6%	6.4%	8.3%
Electricity, gas, water and waste services	1.2%	0.8%	1.2%
Construction	7.3%	3.1%	10.4%
Wholesale trade	2.7%	4.7%	3.6%
Retail trade	13.8%	8.2%	10.1%
Accommodation and food services	6.9%	3.3%	5.9%
Transport, postal and warehousing	3.8%	3.5%	4.6%
Information, media and telecommunications	0.8%	0.4%	1.1%
Financial and insurance services	1.8%	1.2%	2.6%
Rental, hiring and real estate services	1.7%	0.4%	1.8%
Professional, scientific and technical services	4.2%	2.2%	7.3%
Administrative and support services	2.2%	1.05	3.1%
Public administration and safety	7.5%	6.3%	6.3%
Education and training	10.2%	8.6%	8.1%
Health care and social assistance	13.1%	6.5%	10.4%
Arts and recreation services	1.1%	0.1%	1.4%
Other services	4.0%	2.6%	3.9%
Other	0.9%	0.6%	1.3%
Total	100.0%	100.0%	100.0%

Source: ABS 2012, 2011 Census

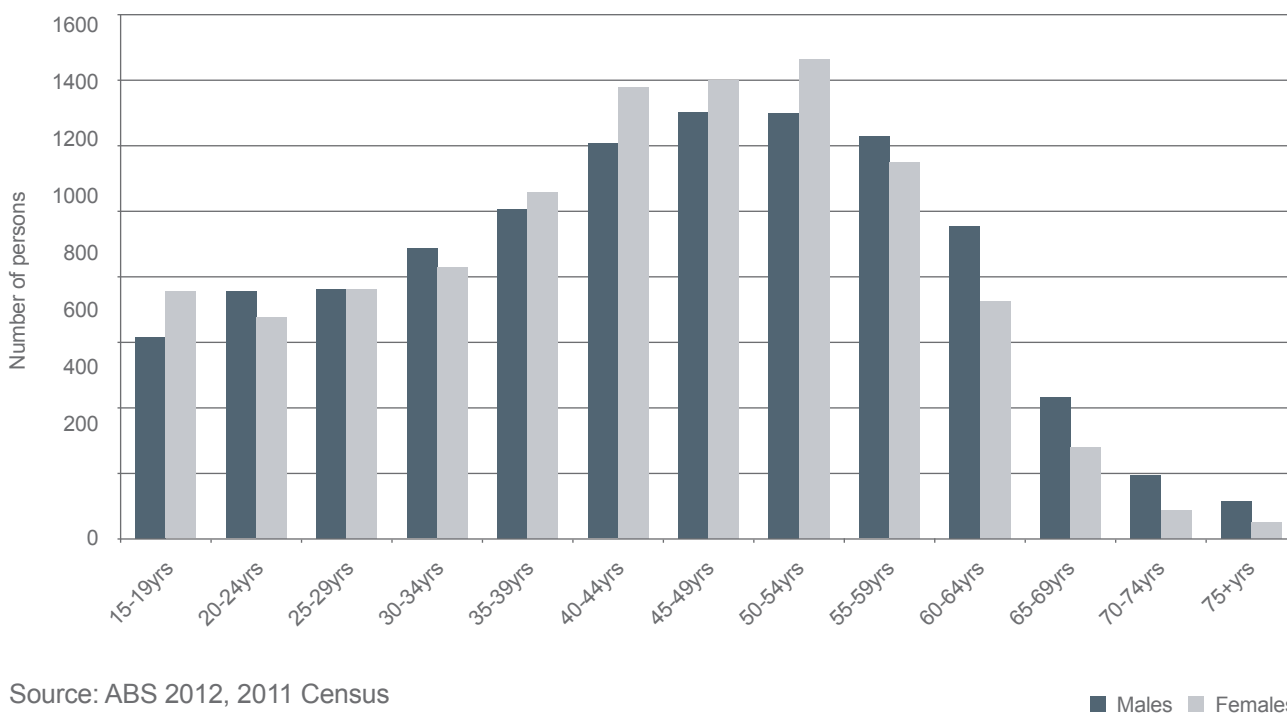
¹¹Please note the figures may not total 100 due to rounding.

Ageing of the workforce

One of the major challenges facing Australia is the ageing of the workforce. Research suggests that this problem tends to be more chronic in rural and remote areas than in large urban centres (James and Davies 2001). It is well known that an increasing percentage of the Australian population is within 10 years of the nominated retirement age of 65 years. Many people are in fact retiring at an earlier age. The ageing of the workforce not only results in a decrease in labour supply as older cohorts retire, but also leads to a loss of experience and continuity in many firms and industries. As a consequence, governments and industry groups are giving increasing attention to the issue of workforce ageing (Public Sector Commission 2007).

The data from the 2011 Census indicates that the median age of the Great Southern region is 41 years. With regard to the age of the labour force, 39.2% of the male labour force and 35.3% of female labour force are over 50 years of age. Thus 37.3% of the total labour force is over 50 years of age. Figure 2.13 presents the labour force in the Great Southern in reference to age and gender.

Figure 2.13: Labour force by gender by age in the Great Southern, 2011



Fly-in fly-out workforce

It has been estimated that by 1996 approximately one quarter of those employed in the Western Australian resources sector industry worked on a fly-in fly-out (FIFO) basis. By 2006 it was estimated that more than 4 in 10 workers in the sector were FIFO. In 2008 the Chamber of Minerals and Energy estimated that 45% of workers directly engaged in the State's mining industry were employed on a FIFO basis. The ABS estimated that in December 2011 the workforce for the resources sector was approximately 101 000. The Chamber of Minerals and Energy of Western Australia estimated that in 2011 52% were employed on FIFO rosters (Chamber of Minerals and Energy 2008 and 2012).

However, FIFO is not limited to the mining industry and is also common in a range of other sectors, including construction, light manufacturing, medical and other service occupations. There is also a longstanding tradition of drive-in drive-out (DIDO) employment, particularly amongst contractors. In addition, the use of FIFO and DIDO is increasing in the agricultural sector.

Over the past decade, FIFO has become an increasingly contested workforce practice. While it is beyond the scope of this report to offer a comprehensive assessment of these, they are claimed to include a number of advantages and disadvantages.

The perceived advantages include:

- an ability to attract skilled and other labour to remote areas;
- the ability to expand a labour force in a particular location extremely quickly;
- reduced costs for companies and governments who no longer need to construct project towns; and
- increasing flexibility and choice on the part of workers with regard to work location and conditions.

The perceived disadvantages include:

- economic activity bypassing local and regional economies;
- constrained population growth;
- a range of social/psychological impacts on families, children and workers; and
- the impacts on social institutions in both the 'source' urban communities and regional communities.

The impacts of FIFO and DIDO have recently been considered by the Commonwealth Government's House of Representatives Standing Committee on Regional Australia.

The committee's terms of reference were to consider:

- the extent and projected growth of FIFO and DIDO work practices;
- the impact of FIFO and DIDO work practices on individuals, communities and companies;
- long term strategies for economic diversification in towns with large FIFO and DIDO workforces; and
- provision of services, infrastructure and housing availability for FIFO and DIDO employees.¹²

¹²See http://www.aph.gov.au/Parliamentary_Business/Committees/House_of_Representatives_Committees?url=ra/fifodido/tor.htm

It is worth noting that the committee recently recommended that the Commonwealth Government require each Regional Development Australia committee, in consultation with regional health groups such as Medicare Locals, to have a health focus in its strategic plan, specifically focussing on long term workforce and infrastructure planning and the role that FIFO and DIDO medical practitioners will play in future service delivery, with a primary aim to increase residential service delivery.

This is worth considering as increasingly, the Great Southern is seeing a workforce making more use of FIFO. It is also experiencing the impact of fly-out fly-in (FOFI) labour where residents in the regions travel to work in other regions. The impact of FIFO/FOFI on regional economies and communities has been a topic of considerable interest for nearly 20 years (Storey 2001). Yet surprisingly few quantitative analyses have been undertaken of the structure and dynamics of FIFO/FOFI workforces. A limited number of case studies have been published that explore the impacts of FIFO/FOFI on local economies, communities and families.

Of local relevance, the City of Albany, as part of its strategic objective to position Albany as Western Australia's most highly sought after place to live, work and invest, has a strategy to promote Albany as a base for FIFO operations for resource development projects. This strategic initiative is now being implemented (City of Albany 2009).

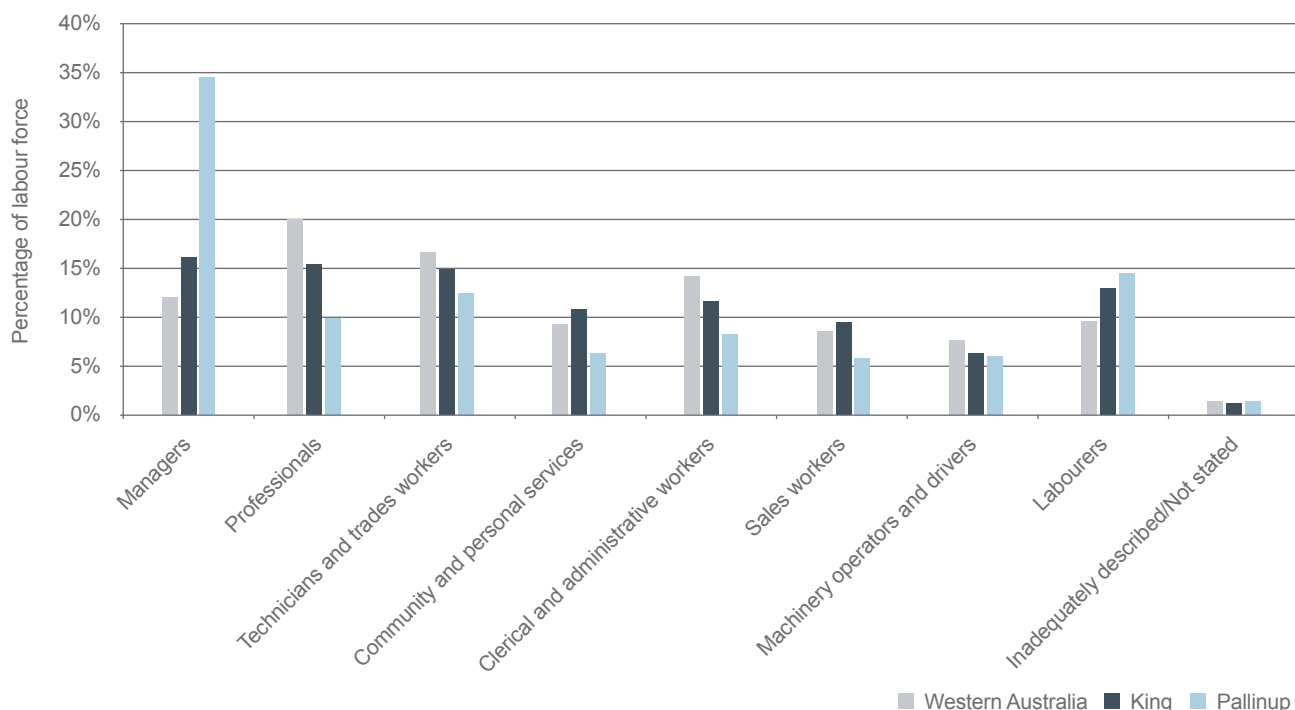
Closely related to FIFO/FOFI is the expansion of mobile, contract labour in regional areas. Increasingly, labour is being provided by metropolitan based contracting firms for activities as diverse as mine site engineering, transport and logistics, construction and so on. This is, in part, a reflection of the volatility of resource economies and the labour force flexibility now being demanded as part of many resource and other projects. Thus, in many areas DIDO labour has important implications for regional communities and economies.

An increase in FIFO workers can reduce the permanent resident population.

The typical flow on effects of this situation include a contraction of the local retail trade and service sectors and further reductions in the permanent population (Tonts, Davies and Haslam-McKenzie 2008).

Occupational trends

In terms of occupational structure in the Great Southern, the most common occupation for people in the Great Southern is managers. As can be seen from figure 2.14, this exceeds the State average. It has been suggested that this situation is due to the prevalence of family farms, where the farm owner is regarded as a manager. Given the dominance of this occupational group, most other sectors are under-represented when compared to the State averages. The relatively high proportion of labourers in both sub-divisions may be due to unskilled or semi-skilled labour demand in some industries across the region.

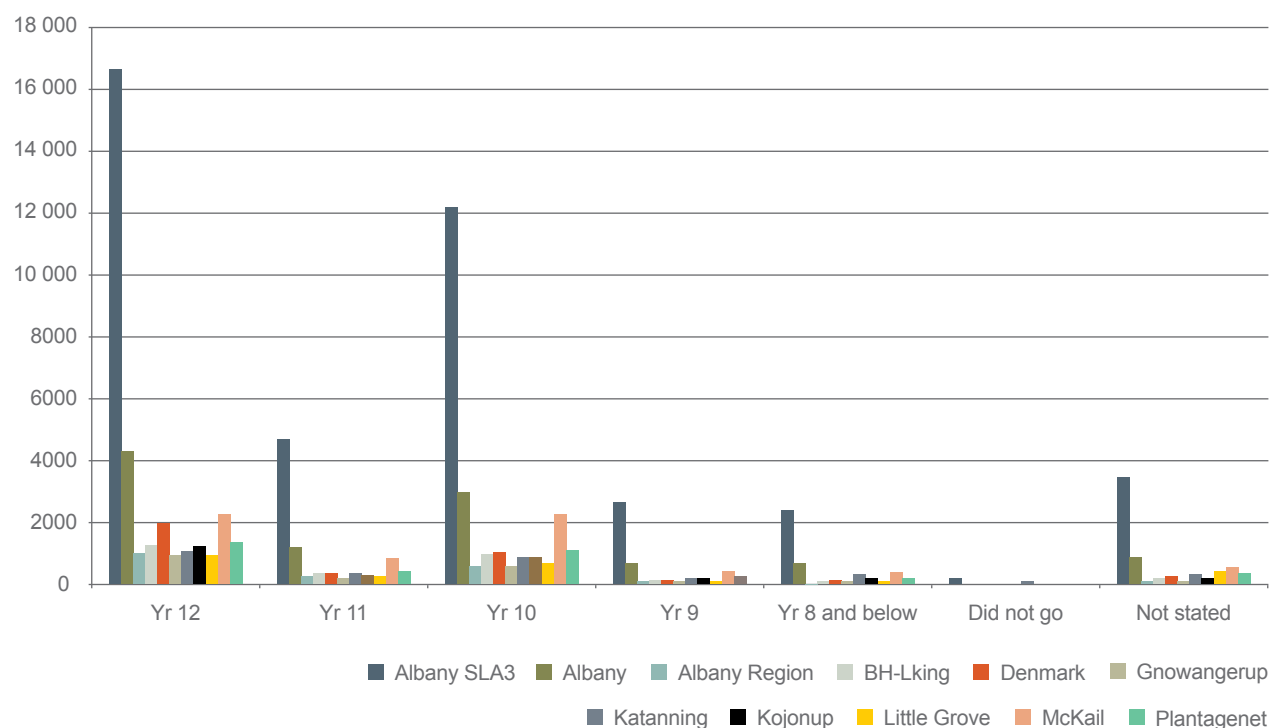
Figure 2.14: Labour force by occupation in the Great Southern, 2011

Source: ABS 2012, 2011 Census Time Series

Education base

From figure 2.15 it can be seen that in 2011 the highest level of schooling achieved by residents in the Great Southern region (Albany SAL 3) was lower than the Western Australian average. Given that primary and secondary industries prevail across the region this is not unexpected. The requirement for formal education and training is historically lower than in other sectors.

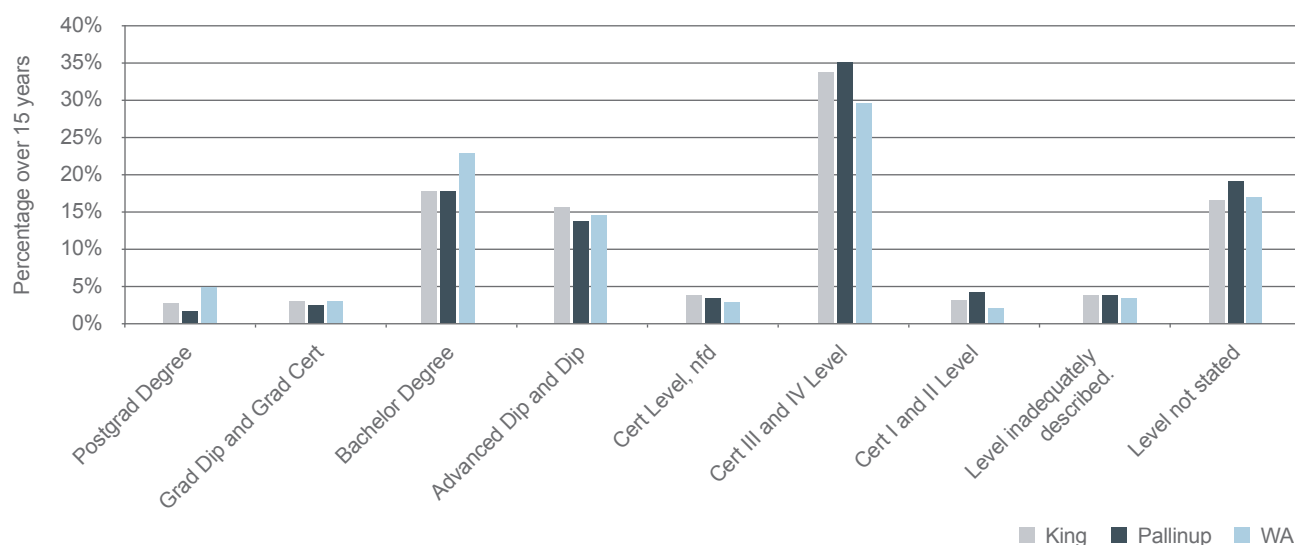
Figure 2.15: Highest level of schooling in the Great Southern region, 2011



Source: ABS 2012, 2011 Census

Figure 2.16 presents a proportional distribution of post school qualification levels held by residents of the Great Southern in 2011. In King 23% of the population with post school qualifications had a bachelor degree or higher. While in Pallinup the figure was 22%. For Western Australia as a whole it was approximately 31%. The slightly higher figure for King is not unexpected. The sub-division has the City of Albany which has a mix of enterprises and services which usually require people to have formal university level qualifications, for example in areas such as education, finance, accounting and health services.

Through stakeholder consultations it was noted that Tertiary Institutions Service Centre data indicated an increase in year 12 students who deferred taking up a place in a tertiary institution. Of the 2011 cohort of year 12 students in the City of Albany, 76.4% deferred taking up their place, up from 73.5% in the previous year.

Figure 2.16 Distribution of levels of post-school qualifications held in 2011

Source: ABS 2012, 2011 Census Time Series

Table 2.28 provides a comparison of the level of highest qualification in 2006 and 2011.

Table 2.28: Level of highest qualification – persons aged 15 and over, 2006 and 2011

Level of highest qualification – persons aged 15 and over	2006	2011
Postgraduate degree	347	538
Graduate diploma and graduate certificate	441	593
Bachelor degree	3140	3771
Advanced diploma and diploma	2789	3254
Certificate	7168	8743
Level of education inadequately described	589	813
Level of education not stated	4613	3579
Total	19 088	21 295

Source: ABS 2012, 2011 Census Time Series

Regional infrastructure

This section addresses the key infrastructure issues which have the potential to influence or impact on the economic development of the regions. In general, the Great Southern has well developed infrastructure. Nonetheless, some developments and improvements could have a positive impact on economic and social conditions. Capital investment in infrastructure in the areas of power, water and transport remains a key factor in attracting new industries and in expanding those already established in the region. The issues presented here are the:

- road network;
- road transport services;
- airports and air services;
- water resources;
- rail network;
- communications network;
- health services; and
- education.

The road network

Generally, the road network in the region is well developed. It connects all major towns. In its profile of the Great Southern region Main Roads stated that there were 1566 km of State roads and 13 376 km of local roads in the area. This represents 12% and 10% of the State total respectively.

Main Roads has noted that the existing road network is ageing. Further strain is being placed on the network due to the closure of key rail spurs.

Historically, the agricultural industry has been a significant user of the network with considerable quantities of grain transported by road. The closure of rail spurs in the region has increased the agricultural use of the roads. The tourist industry also contributes to road use with the majority of tourists being domestic visitors who travel to and within the region in private vehicles. While the mining sector has not been a significant user of the road network to date, recent developments in this area will undoubtedly put more pressure on the network. Likewise, developments such as those occurring at the Albany waterfront and the Katanning SuperTown project are likely to result in increased road use.

The City of Albany's *Economic Development Strategy (2010–2015)* flagged a commitment to advocating for improvements to regional transport infrastructure including the construction of the Albany Ring Road (Stage 2 and 3) for heavy haulage to bypass Albany's urban areas and upgrades to Albany Highway, in particular, increasing the number of overtaking lanes.

The Regional Development Australia *Regional Plan* highlighted the need to improve the road and rail infrastructure in conjunction with any developments of the Albany Port.

In 2009, Main Roads listed five major unfunded priority projects for the area:

- South Coast Highway – Pfeiffer to Cheynes;
- Albany Highway – Gordon River Southern;
- Albany-Lake Grace Road;
- Albany Highway – Federal St to Le Grande Ave; and
- Albany Highway – Kojonup (North Passing Lanes).

The 2010–11 State Budget allocated \$10 million for the reconstruction and sealing of existing roads within the Fitzgerald River National Park, including Hamersley Drive (from Hopetoun to Hamersley Inlet). A budget of \$5 million was allocated to commence the upgrading of Chester Pass Road (Main Roads 2009).

Road transport services

Transwa is part of the Public Transport Authority and is Western Australia's regional public transport provider. It provides coach services in the Great Southern region.

Transwa routes of interest to the region include:

- Perth to Esperance via Jerramungup/Dumbleyung;
- Albany to Esperance (Hopetoun/Bremer Bay connection);
- Perth to Albany via Williams/Kojonup/Narrogin;
- Perth to Albany/Gnowangerup/Katanning via Northam/Narrogin; and
- Perth to Albany via Bunbury/Walpole.

The Public Transport Authority's Regional Town Bus Services team manages school and town public bus services in regional Western Australia. The various town bus services are provided by a range of contractors from within the regional locations under an arrangement with the PTA.

A daily passenger bus service operates from Albany to Bunbury and to Perth (Public Transport Authority 2012).

Airports and air services

The Harry Riggs Albany Regional Airport is the main airport in the region. It has the capacity and capability to handle Boeing 737 sized aircraft with its 1800 m runway. It has an instrument landing system. At present the facility handles daily return services to Perth.

There are sealed runways at Denmark and Gnowangerup and small unsealed runways at Cranbrook, Jerramungup, Bremer Bay, Kojonup and Katanning. Charter and private aircraft, as well as agricultural contractors, use Albany airport and the airstrips at Denmark and Gnowangerup.

As part of its *Economic Development Strategy (2010–2015)*, the City of Albany plans to advocate for improvements to the airport infrastructure to accommodate jet services should they be introduced as a regular public transport service.

In addressing the proposal for Katanning as a SuperTown, the draft *Katanning SuperTown growth and implementation plan* (March 2012), makes reference to the current and proposed value and use of the Katanning Airport.

The airport lies a few kilometres to the south east of Katanning and is most suited to small aircraft. It is used by the local mining companies. It is anticipated that the airport will service private enterprise rather than passenger services. The airport is regularly used by the Royal Flying Doctor Service.

Based on advice from the Civil Aviation Safety Authority that aerodrome registration is needed in order to maintain the current instrument approach approvals, the Shire has begun registration proceedings. A recent independent report suggested that a number of upgrades are required to support the registration and to ensure safety standards.

The improvements include:

- an upgrade of the existing gravel strip to a sealed all weather standard;
- the widening and sealing of the existing taxiway;
- the realignment and sealing of the airport access road; and
- an upgrade of the navigational aids.

The Katanning draft growth plan identified the following additional benefits to improving the airport.

- If the resources industry is to expand it is likely to significantly increase airport traffic.
- Australian Defence Force aircraft use the airstrip for exercises on a regular yearly basis.
- There are three privately owned/leased hangers at the airport and there is an Aero Club in operation.

The issue of a fly-in fly-out workforce is of significance to the role of airports in the region in supporting economic and community development. Fly-in fly-out services will put considerable strain on the existing facilities and will impact on the ways in which the local community uses and has access to the airport facilities and services. In December 2011 Rio Tinto announced an expansion of its regional fly-in fly-out services from Albany to their Brockman Operations in the Pilbara.

The 2010–11 State Budget made \$5.5 million available for the Regional Airport Development Scheme (City of Albany 2009; Rio Tinto 2011; Shire of Katanning 2012).

Rail

While the Great Southern region is well serviced by rail transportation for bulk commodities, there are no passenger services available. Some railway stations can still be found in the region, for example at Katanning, and are evidence of earlier passenger services. However, it is unlikely that the services will be reinstated as the current policy view is that it is unsafe for freight and passenger services to share the same tracks (Shire of Katanning 2012).

The majority of the network used by grain trains is operated by WestNet Rail (WNR) under long term lease from the State Government through the Public Transport Authority (PTA). Any line sections that are demonstrably non-commercial may return to government control.

Prior to the initial privatisation sale of the network in 1999, much of the network had undergone a re-sleeper program. Thus by 2009 significant sections of the network had or would soon reach the point where a further round of sleeper replacement was required.

Australian Railroad Group (ARG)¹³ is presently the single operator which provides the rail services to the grain sector and thus the Great Southern.

In mid-2009 the then Minister for Transport, Hon Simon O'Brien MLC, established the Strategic Grain Network Review Committee to provide advice to the Minister on emerging transport infrastructure issues in the export grain supply chain. The following findings and recommendations of the committee are of relevance to the region.

- Rail transport operations were considered to be commercially viable in the Albany¹⁴ zone, however, funding of \$164 million would be needed for re-sleepering. Rail was viewed as viable in the future if Government met re-sleepering costs. Rail's competitiveness would increase as diesel fuel and carbon costs increased in future.
- Investment in road corridor upgrades was viewed as a necessary complement to the long term rail network. In particular for roads not fit for use by heavy grain haulage trucks, most notably the Chester Pass Road into Albany. Some of these roads would be impacted by the cessation of uncompetitive rail services.

¹³ From July 2011 ARG operates under the QR National banner which acquired ARG in 2006

¹⁴ The Albany zone services grain growers in a wide arc between the timber country in the south west and the open land in the Hyden area. The western and northern parts of the zone are served largely by rail (17 sites), while eastern and central areas are largely served by road. There are three main road corridors and one rail corridor linking the zone with its port. The grain transport task in the Albany zone averages two million tonnes per annum, with rail carrying around 50% of this task.

-
- There was a sound business case for the long term retention of the Northam-Albany line. This line was nominated as being of ongoing strategic significance to the region, the grain industry and future mineral export opportunities. The line also acts as a barrier protecting the coastal metropolitan areas from the impact of heavy truck movements.
 - The Katanning to Nyabing and Gnowangerup lines were deemed to be uncompetitive with road transport and would become even less competitive with time. Thus rail services no longer operated on these lines and the recommendation was made that they should be formally closed¹⁵.

In November 2010, the Western Australian Government announced an upgrade of the grain freight network with the allocation of a \$178.8 million State Government funding package for the re-sleeper program. This was in addition to more than \$13.5 million that had already been invested in the re-sleeper program. Nearly 400 km of rail lines in the Albany zone were to be upgraded under the package. The State Government's funding initiative also locks in a Federal Government contribution of \$135 million. In addition to the government funding, WestNet Rail, had invested more than \$8.25 million as well. This brings the total investment in the grain freight network to \$352 million over four years (Ministerial Media Statements – Grain Freight Network 2011–12).

Water resources

The main water supply is the Great Southern Towns Water Supply Scheme (GSTWS), primarily that proportion known as the lower GSTWS. This scheme also supplies potable water to 33 towns in the upper Great Southern region. The water is supplied from Harris Dam near Collie.

Water is also supplied by the Albany scheme with some regional centres having their own water supply system (Great Southern Development Commission 2012). The lower GSTWS sources include a series of borefields to the south west and a surface water source to the north east of Albany.

In 2010 the Water Corporation launched its 50 year plan for the delivery of sustainable water sources for the towns of the Great Southern region (*Water Forever: Lower Great Southern report*). The strategy was prepared in consultation with the Department of Water and aims to secure future water supplies for the towns of Albany, Denmark, Mount Barker and Walpole. In doing so it focuses on three main areas to help meet the challenges of a drying climate:

- using less water;
- recycling more; and
- finding new water sources.

According to the Water Corporation, the drinking water requirements of the Great Southern region are likely to double by 2038. The Department of Water released its report, *Water Resource Development Strategy for the Lower Great Southern Region* (June 2010), to guide the identification and selection of new drinking water sources.

¹⁵Report prepared for Freight and Logistics Council of WA on behalf of the Strategic Grain Network Committee December 2009

Furthermore, the Water Corporation has identified four current or proposed projects of relevance to the region. The projects are a response to the expected population growth and seasonal water demands. These projects are:

- Albany Water Supply

A series of new bores is planned, as is the replacement of a selection of older bores. The existing bore fields have been scheduled for replacement commencing in 2012 and this will continue for four years.

- Denmark Wastewater Scheme

The Denmark Wastewater Treatment Plant will be upgraded during 2012–13.

- Denmark Water Supply

A new water storage tank, pipeline and pumping stations are currently being built to increase Denmark's water storage capacity. Construction of the water storage tank, pipeline and pumping stations began in January 2010 and were completed in March 2012. The Water Corporation is also proposing to supplement the water supply from Quickup Dam by transferring treated water from the Denmark Pipehead. Once the assessment and approval process for this are completed, the Corporation anticipates putting a project in place to complete the construction by late 2014.

- Kojonup Water Supply

As Kojonup's current water supply main is nearing the end of its economic life, it will be replaced.

The 2010–11 State Budget allocated \$10.6 million for construction of the new 15 megalitre water storage tank and pipeline in Denmark and \$7 million for an upgrade of the Denmark Wastewater Treatment Plant.

The expected increase in demand from new/expanded mining projects and any increases in population as a result of the SuperTowns initiative have the potential to impact on the quality and quantity of water required. Any other significant increases in industry development in the region will put pressure on the supply of potable water. For example, the Western Australian Meat Marketing Co-operative Limited situated in Katanning uses approximately one-third of the town's potable water (Department of Water 2010; Shire of Katanning 2012; Water Corporation [n.d] and 2009).



Gas

At present, reticulated gas is not provided to the region. Requirements for gas are mostly catered for through bottled gas for the domestic market and bulk gas storage for the industrial requirements. LPG supply is located in Albany. The location is serviced by distribution networks reticulating the liquefied petroleum gas.

The proposed gas pipeline has the potential to provide an important resource for industry development and the growth of Katanning as a SuperTown.

The 2010–11 State Budget provided \$4.9 million for a Bunbury to Albany Gas Pipeline. The State Government has commenced a project to determine route alignment options for the Bunbury to Albany Gas Pipeline corridor. Existing and potential energy demands and route alignment options will be assessed. The potential demands generated by the SuperTowns initiative as well as social, economic, environmental and engineering factors will be taken into consideration as part of the project (City of Albany 2009; Department of Regional Development and Lands 2011; Shire of Katanning 2012).

Electricity

Power is provided to the Great Southern from the South West Interconnected System electricity supply. Verve Energy operates the power stations, including the wind farms, which provide the power to the Great Southern. These stations produce approximately 60% of the State's electricity. Western Power supplies the electricity to the region through the South West Integrated Grid. There are substations in Albany, Mount Barker, Katanning and Kojonup.

There is also a 22 MW wind farm in operation at Albany and another north of Mount Barker which consists of three 800 kW E53 Enercon wind turbines.

Verve Energy and Western Power appear to be in a position to continue to meet energy requirements as well as provide additional capacity to meet any demand from population increases related to such stimulus as the SuperTown initiative. However, any new large demands from industry such as new mining activity will require a specific assessment of capacity and of the network to supply the additional electrical load.

In its economic development plan, the City of Albany has flagged that it would advocate for the local electricity infrastructure to accommodate renewable energy projects and major industry projects and support the introduction and use of renewable energy projects to set up Albany as a net exporter of renewable energy generation including wave, wind and biomass power (City of Albany 2009; Department of Regional Development and Lands 2011; Shire of Katanning 2012).

Telecommunications

The consistent availability of robust telecommunications is central to economic and social capacity. The use of the internet and mobile services is extremely important in the region and also critical to economic activity. The region has a complete range of voice and data telecommunications, including higher end bandwidth solutions such as ISDN and Frame Relay. The rollout of the National Broadband Network offers further potential for the region to capture the economic and social benefits of high speed communications.

Southern Phone, which has a focus on delivering services to customers across regional Australia, will now offer Telstra Wholesale's 3G mobile network coverage and speeds to its customers. Southern Phone currently offers Telstra Wholesale's 2G mobile network coverage (City of Albany 2009; Department of Regional Development and Lands 2011; Shire of Katanning 2012).

Katanning is the distribution centre for telecommunications for the greater part of the South West and Great Southern. This provides significant capacity through a direct high speed connection with the national and international communication line. The Katanning draft growth plan noted: 'Katanning enjoys Next G mobile coverage within a 4 km radius of the town and mobile broadband coverage at a speed 1.1-20 Mbps within a 1 km radius of the town. Investigations have found that ADSL broadband is generally available within the town site however there is anecdotal evidence that this coverage is not complete. The town site is fully serviced with landlines for telephones' (Shire of Katanning 2012).

In its *Economic Development Strategy* the City of Albany has stated that it will advocate for improved broadband access for residents and businesses in outlying areas of the City of Albany (City of Albany 2009).

The apparent availability of telecommunications infrastructure notwithstanding, there is community concern about the extent and reliability of the infrastructure and related services. The consultation program which was undertaken as part of the Regional Development Australia process to develop a regional plan for the Great Southern, consistently raised the issues of access to broadband and poor or no mobile phone coverage. In addition, there was a prevailing view that the cost of technology was prohibitive. Concerns were also raised about the lack of IT support, the limited number of service providers and the capacity to use technology (Regional Development Australia 2009).

While the following information on telecommunications is not specific to the Great Southern region, it is worthwhile noting the information when considering improvements needed to telecommunications in the region.

-
- The Engineer Australia's 2010 Western Australia Infrastructure Report Card¹⁶ found that, in general, the condition of Western Australia's infrastructure was adequate to good. Nonetheless major changes were needed. Growing pressures on keeping up with demand and fixing many inadequacies still remained. While the C- rating given to the telecommunications infrastructure acknowledged that the PSTN network was of a good standard for telephony, there were major limitations in providing data services as evidenced by the significant broadband black spots in metropolitan Perth and very limited availability in non-metropolitan areas. Mobile phone coverage in larger urban areas across the State was adequate, however, it was noted that there was a lack of coverage outside major regional centres. Of significance was the lack of coverage along major highways. It was also noted that there was a lack of competitive infrastructure for mobile phone networks outside major centres. Backhaul was adequate to metropolitan areas. Nevertheless there was a failure to provide the level of services required in other areas of the State (Engineers Australia 2011).
 - A Regional Telecommunications Independent Review Committee was established in 2011 to review telecommunications services in regional, rural and remote parts of Australia. The five key areas of interest for the 2011–12 Regional Telecommunications Review were:
 - opportunities the emerging digital economy provides for regional Australians;
 - improving regional health and education outcomes;
 - the communication needs of Aboriginal people and communities;
 - developments in the terrestrial and satellite mobile phone sector; and
 - consumer concerns of people and business in regional, rural and remote Australia.

The committee submitted its report to the Minister for Broadband, Communications and the Digital Economy on 5 March 2012. It was tabled in Parliament on 23 May 2012¹⁷.

The 2010–11 State Budget allocated \$889 000 to a Regional Mobile Communications Project. The region will also benefit from the budget allocation of \$120.3 million over three years to expand the State's mobile phone coverage on the State's highways, including \$8.3 million in 2010–11 to expand mobile phone coverage to address black spots.

Health services

Existing and potential employees in regional areas are commonly concerned with the availability and quality of health care, including key specialist services. A range of medical, dental, mental and aged health services are provided throughout the region. Furthermore, the State Government has provided funds to improve the situation including:

- \$170.4 million Albany Heath Campus development;
- \$9.3 million for the Flying Doctor Service; and
- \$9 million for the Patient Assisted Travel Scheme.

Note that the two latter allocations are distributed statewide and not specifically to the Great Southern.

¹⁶The Infrastructure Report Cards is a major initiative of Engineers Australia. It aims to advance the quality and provision of infrastructure across the nation, with subsequent benefits to Australia's economy, communities and the environment. The project's output consists of Report Cards for all Australian States and Territories.

¹⁷For further information see <http://www.rtrc.gov.au/> Full report may be found at http://www.rtrc.gov.au/files/2012/06/Regional_Communications-Empowering_digital_communities.pdf

The Southern Country Health Service, previously WA Country Health Service (WACHS), provides the following facilities and services across the region:

- Hospital services;
- Albany Hospital;
- Bremer Bay Health Centre;
- Denmark Hospital and Health Service;
- Gnowangerup Hospital;
- Jerramungup Health Centre;
- Katanning Hospital;
- Kojonup Hospital;
- Plantagenet Hospital; and
- Tambellup Nursing Post.

They also provide:

- Aboriginal health services;
- Great Southern Aboriginal Health Service;
- aged care services;
- Great Southern Aged Care Unit;
- community and public health services;
- Great Southern Population Health Unit;
- mental health services; and
- Southern Mental Health Services – Albany.

Diabetes service centres and sites operate through the Great Southern Public Health Service, Great Southern GP Network, regional hospitals and regional primary health services (WACHS 2012).

Health status profile

Based on ABS 2007 data, the Great Southern population is relatively healthy on a population wide basis. However, the prevalence of chronic disease is on the increase and the population is proportionally more obese than the State average. There are more females with higher blood pressure (although notably fewer men) and there are more people with high cholesterol (WACHS 2012).

Causes of hospitalisation¹⁸

Almost 45% of hospitalisations were recorded as 'other admissions' which includes respiratory medicine, gynaecology and ophthalmology. Specific reasons for hospitalisation in the Great Southern were:

- orthopaedics 9.42%;
- diagnostic GI endoscopy 7.22%;
- non subspecialty surgery 5.62%;
- renal dialysis 5.61%;

¹⁸WACHS website <http://www.wacountry.health.wa.gov.au/index.php?id=517>

-
- obstetrics 5.48%;
 - chemotherapy and radiotherapy 5.3%;
 - non subspecialty medicine 5.62%;
 - cardiology 4.16%; and
 - psychiatry acute 3.89%.

The recently completed *Great Southern Health Profile* identified a range of specific considerations which need to be taken into account in the planning of primary health services within the Great Southern region. Those with direct and indirect relationships with workforce planning include:

- population – the percentage of people aged over 65 in the region was higher than that of the State;
- emergency departments – the attendance rate has increased in the region. It is significantly higher than that of the State;
- diabetes and its complications was the leading condition for potentially preventable hospitalisations among both Aboriginal and non-Aboriginal residents;
- the hospitalisation rate for alcohol related conditions was significantly higher than that of the State; and
- determinants of health – the region has some areas with low socioeconomic indexescores (WACHS 2012).

The State Government's Royalties for Regions program is funding the Southern Inland Health Initiative. Under this initiative there will be a significant improvement to medical resources and 24 hour emergency coverage in the area. The initiative aims to:

- deliver safe and effective emergency services and good access to general practice;
- put private general practitioners back into country towns, supported by visiting specialists and health practitioners backed up by 'e-technology' such as telehealth;
- provide better support to nurses who, due to the lack of doctors in this region, carry greater responsibilities; and
- fund the equivalent work value of 44 extra doctors to secure emergency department services and GP services across eight districts (Department of Health 2011).

Issues impacting on regional health include:

- the shortage of GPs and attracting and retaining medical and allied health professionals;
- access to medical specialists, specialist services, free dental care and allied health professionals;
- the age and capacity of existing infrastructure;
- travel distances to access health services;
- the lack of allied health services for children;
- the lack of access to aged care facilities;
- an increasing demand for mental health services; and
- opportunities for telehealth and e-health (Regional Development Australia 2009).

General practitioners

A critical component of health services in the region is the availability of general practitioners (GPs). They are central to individual health care as well as public health programs, such as vaccinations and the early intervention and management of chronic conditions. The Great Southern GP Network not only covers the Great Southern region but also Ravensthorpe and the Southern Wheatbelt health district. During 2009–10 there were more than 300 000 GP attendances. This translates to a rate of 3718 per 1000 people in the area. In comparison, the State rate was 3858 per 1000 people. Table 2.29 outlines these attendances (WACHS 2012).

Table 2.29: Medicare GP professional attendances – Great Southern division of general practice, 2009–10

Item		Number	Crude rate (p/1000)
GP attendance	Total	300 183	3718
	\$ Benefit	11 143 956	138 043
	After hours	386	5
Multidisciplinary care plans		11 228	139
Health assessments		2212	27
Mental health treatment		4510	56

Source: Medicare Australia group reports, 2010

Home and community care

Given the higher proportion of the population over 65 years of age, home and community care (HACC) is important to the region. HACC provides a basic level of support and maintenance services to older Australians, younger people with a disability and their carers. It aims to assist them to be more independent at home and in the community. Thus, it has the potential to reduce the need for admission to residential care. According to HACC statistics, there were more than 82 000 occasions of service provided by HACC in the Great Southern. This accounts for 16% of Western Australian Country Health Service (WACHS) HACC occasions of service (WACHS 2011).

Albany Health Campus

The construction of the new Albany Health Campus is underway with the new facility scheduled to open in 2013. It will feature modern facilities which will support the delivery of health care and services enabling up to 80 per cent of patients from the Great Southern to be treated closer to where they live. Emergency, medical, surgery, maternity, cancer and mental health services will all be available. Improvements include:

- a larger emergency department with state of the art equipment and a four bed short stay observation unit;
- the inpatient mental health ward expanded from nine to 16 beds, including a four bed secure unit;
- a purpose built surgical centre incorporating three new theatres, a scope room and a procedure room, allowing for more elective and day surgeries to be performed in Albany;
- a new maternity unit and three birthing facilities;
- a Level 2 special care nursery to care for sick infants 36 weeks and older;
- extensive ambulatory care centre, encompassing six renal dialysis chairs, allied health services and specialist clinics;
- radiology including CT with provision for MRI in the future;
- improved six bed high dependency unit next to the emergency department;
- new inpatient wards with a mixture of single and double rooms;
- comprehensive cancer centre, including seven chemotherapy chairs; and
- the first purpose built sub-acute care unit of its kind in country Western Australia for patients 15 years and older who need rehabilitation services.

The Albany Health Campus will also support and work with smaller hospitals throughout the region to provide improved medical services throughout the region (WACHS 2012).

Education

The availability and quality of education facilities, particularly secondary schools, is a key concern for the community. Numerous studies point to the transition to high school, especially senior high school, as one where rates of out-migration tend to be high. The availability and quality of education facilities is often a key component of decision making with regards to migration.

The Great Southern region has educational facilities ranging from preschool to vocational education and a university presence. Pre-primary and primary schools are located across most of the region's centres, with three district high schools at Gnowangerup, Jerramungup and Kojonup and five government senior high schools located at Albany (two), Denmark, Katanning and Mount Barker. Private schools, K-12 and primary level also operate in some regional centres. The WA School of Agriculture is located in Denmark. The Great Southern Institute of Technology is located in Albany with campuses in Denmark, Katanning and Mount Barker. Ten other centres are coordinated through these campuses. Areas of training and education cover primary industry, business, hospitality, social sciences and trades.

A Bachelor of Science in Nursing is offered at Great Southern Institute of Technology's Albany Campus, contracted through Curtin University (Great Southern Institute of Technology 2012). The University of Western Australia's Centre in Natural Resource Management is located in Albany.

Great Southern Institute of Technology has implemented a range of projects aimed at encouraging learning experiences in the region as well as providing a skilled workforce for the region. These include:

- a new automotive workshop at the Albany campus funded by the State Government (\$1.9 million); and
- the Training Infrastructure for Tomorrow project at the Albany campus focusing on primary industry (wool and aquaculture). This is funded by the Australian Government (\$2.995 million).

The State Government is also funding the project for a new Mount Barker campus which presents opportunities to develop options for establishing industry focussed training.

The educational and training issues identified in the *Regional Plan* for the Great Southern region included:

- skills shortages;
- disengaged youth;
- training for youth in trades; and
- sustaining the quality of education.

The current situation was seen as an influence on young people's decisions to leave the region. In addition there was a call for more technology to support education and service provision in the region (Regional Development Australia 2009).

A major project funded by the State Government in the 2011–12 Budget was \$25.5 million on building and upgrading schools throughout Western Australia including completion of the Yakamia Primary School, completion of a Trade Training Centre at North Albany Senior High School and \$4 million from Royalties for Regions for Denmark District High School from a total of \$7 million.

Other statewide allocations to education were:

- \$1.6 billion invested in primary and secondary education infrastructure throughout Western Australia over the forward estimates period;
- \$52 million for all schools to be air-cooled over four years;
- \$2 million for the Royalties for Regions Boarding Away From Home Allowance program; and
- \$3.9 million from Royalties for Regions toward the Orange School Bus initiative.

Aboriginal participation

Introduction

Aboriginal employment remains an important political and social issue in rural and remote Australia. Unemployment rates in these areas are higher than for the non-Aboriginal population. Participation rates and levels of socioeconomic wellbeing are lower. This section examines the employment characteristics of this component of the population. It first summarises the general demographic characteristics of the population, before examining rates of participation, unemployment and employment by sector.

Aboriginal demographics

The 2011 ABS Census shows that, of the 55 357 Great Southern residents recorded in the 2011 Census data, 3.4% were Aboriginal Australians. This equated to 2095 people. In comparison to other regions in Western Australia, the Great Southern has a lower proportion of Aboriginal Australians. Table 2.30 details the Aboriginal population in the region by age.

Table 2.30: Aboriginal population by age in the statistical areas 2011

Age	Albany SAL2	Albany region	Bayonet Head – Lower King	Denmark	Gnowan/up	Katanning	Kojonop	Little Grove – Elleker	MKail – Wilyung	Plantagenet
0–9yrs	86	3	29	17	45	95	86	9	122	48
10–19yrs	93	7	40	16	27	95	54	15	88	29
20–29yrs	49	0	19	0	24	47	34	52	62	23
30–39yrs	38	6	16	4	12	49	32	36	47	13
40–49yrs	41	0	23	13	12	46	34	18	48	12
50–59yrs	30	3	4	3	14	34	20	6	23	16
60–64yrs	10	0	0	3	6	14	5	6	12	7
65yrs +	18	3	4	0	3	10	9	0	17	4
Total	365	22	135	56	143	390	274	142	419	152

Source: ABS 2012, 2011 Census

At the time of the 2006 Census, the unemployment rate for Aboriginal Western Australians was over three times that of non-Aboriginal Western Australians. It was identified as 24.5%. In terms of employment, the 2011 Census showed 30% of Aboriginal people aged 15 years and over were employed (employment to population ratio). By comparison, in Western Australia 17.8% of the Aboriginal population was unemployed. The employment to population ratio was 38% (ABS 2011 Census Aboriginal and Torres Strait Islander Peoples [Indigenous] Profile 2012).

Of relevance to the development of this plan are the:

- higher unemployment rates;
- lower participation rates; and
- lower levels of education and schooling.

Important here is identifying the barriers to higher Aboriginal participation in the labour force and how these can be overcome. These are complex issues and are central to regional workforce planning.

Aboriginal participation in the labour force

Common to most regional areas is the issue of raising Aboriginal employment. For many years there have been a large number of programs which focussed on the issue. As an example, the Great Southern Employment Development Committee provides a range of Aboriginal employment services including:

- building the aspirations of Aboriginal Australians;
- developing or providing training for Aboriginal Australians;
- employer support services to recruit and retain more Aboriginal Australians; and
- developing Aboriginal workforces in communities and in industries.

These and other services and programs notwithstanding, employment outcomes for Aboriginal Australians still tend to be lower than for non-Aboriginal people.

Aboriginal unemployment rates

Low rates of participation in the labour force are often combined with very high unemployment rates. In areas of high unemployment, it is not uncommon for participation rates to fall as people withdraw from the labour market on account of the low levels of success in finding work (Siegel and Swanson 2004). For the Aboriginal population, there also is a considerable body of evidence pointing to exclusion from the labour market on the basis of lack of qualifications and sociocultural difference (Altman 2000).

While low participation rates can reflect a degree of self exclusion from the labour market, unemployment rates reflect external exclusion whereby persons willing to be employed are unable to gain work.

According to ABS figures, the Aboriginal unemployment rate in the Great Southern was 16.5% compared to 4.5% for non-Aboriginal people in 2010.

Community Development Employment Projects

The Community Development Employment Projects (CDEP) program helps Aboriginals seeking employment to develop the skills, training and capabilities needed to find sustainable employment. The CDEP program provides services and projects through two streams: the Work Readiness Stream and the Community Development Stream. On 1 July 2013 the Australian Government will introduce the Remote Jobs and Communities Program (RJCP). The RJCP aims to achieve personal, social and economic development through active participation, jobs and stronger communities in remote Australia. The CDEP program will transition into this new program.

During the consultation process to develop the *Great Southern Regional Development Plan 2010–20*, the community expressed concern about the level of engagement of Aboriginal people and integrating them into the workforce, particularly in Albany, Katanning and Mount Barker. The impact of the anticipated closure of the CDEP was also noted in the plan (Regional Development Australia 2009).

Educational status of Aboriginal people

One of the factors hindering increased levels of Aboriginal employment in rural and remote Australia is relatively low levels of education. In the Great Southern region, the highest level of schooling completed by Aboriginal people in 2011 was year 10 or equivalent (30%). This percentage of Aboriginal people who have completed year 10 and above compares favourably with the percentage of completion at the State level. Table 2.31 compares the highest level of school achieved by Aboriginal people across the region and the State. It also includes figures for the non-Aboriginal population in the region.

While the level of schooling for Aboriginal people in the region compares favourably with the State statistics It does not compare favourably with that of the non-Aboriginal population across the region. For example 41% of the non-aboriginal people in the region have completed year 12 compared with 18% of the Aboriginal population.

Table 2.31: Highest level of schooling by Aboriginal people, 2011¹⁹

Year achieved	Aboriginal – Great Southern	Non-Aboriginal – Great Southern	Aboriginal – WA
Year 12 or equivalent	18%	41%	21%
Year 11 or equivalent	12%	11.5%	14%
Year 10 or equivalent	30%	30%	29.5%
Year 9 or equivalent	11%	6%	9%
Year 8 or below	8%	6%	9%
Did not go to school	0.8%	0.6%	2%
Highest year of school not stated	20%	5%	15%

Source: ABS 2012, 2011 Census and ABS 2011 Census Time Series

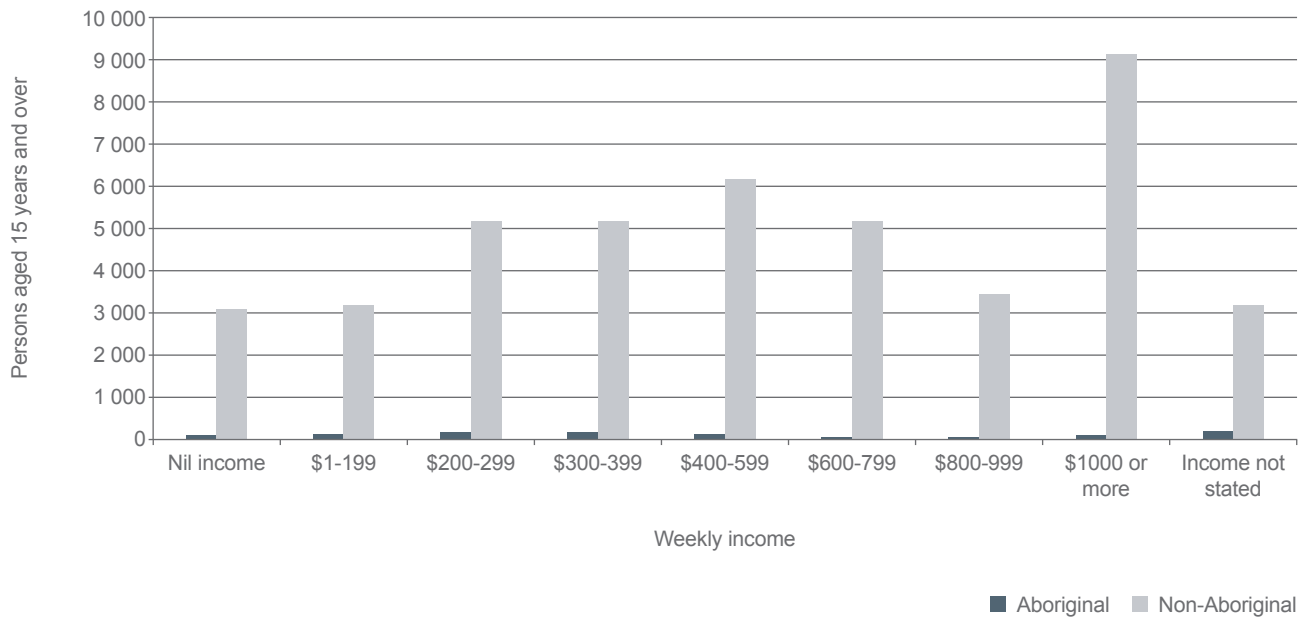
Aboriginal incomes

One of the outcomes of the employment status of Aboriginal people within the region is very low individual incomes. Figure 2.17 compares median weekly Aboriginal incomes across the region in 2011 and figure 2.18 presents the information as a percentage of the working population. The disparity across the region between Aboriginal and non-Aboriginal people is clearly evident. The low incomes have a direct impact on the social and economic wellbeing of the Aboriginal population and reinforce the need for a continued focus on education and employment.



¹⁹Please note that total percentage may not equal 100% due to rounding

Figure 2.17: Weekly income of Aboriginal people in the Great Southern 2011



Source: ABS 2012, 2011 Census and Aboriginal and Torres Strait Islander Peoples (Indigenous) Profile

Figure 2.18: Weekly income of Aboriginal people as a percentage of the working population in the Great Southern 2011

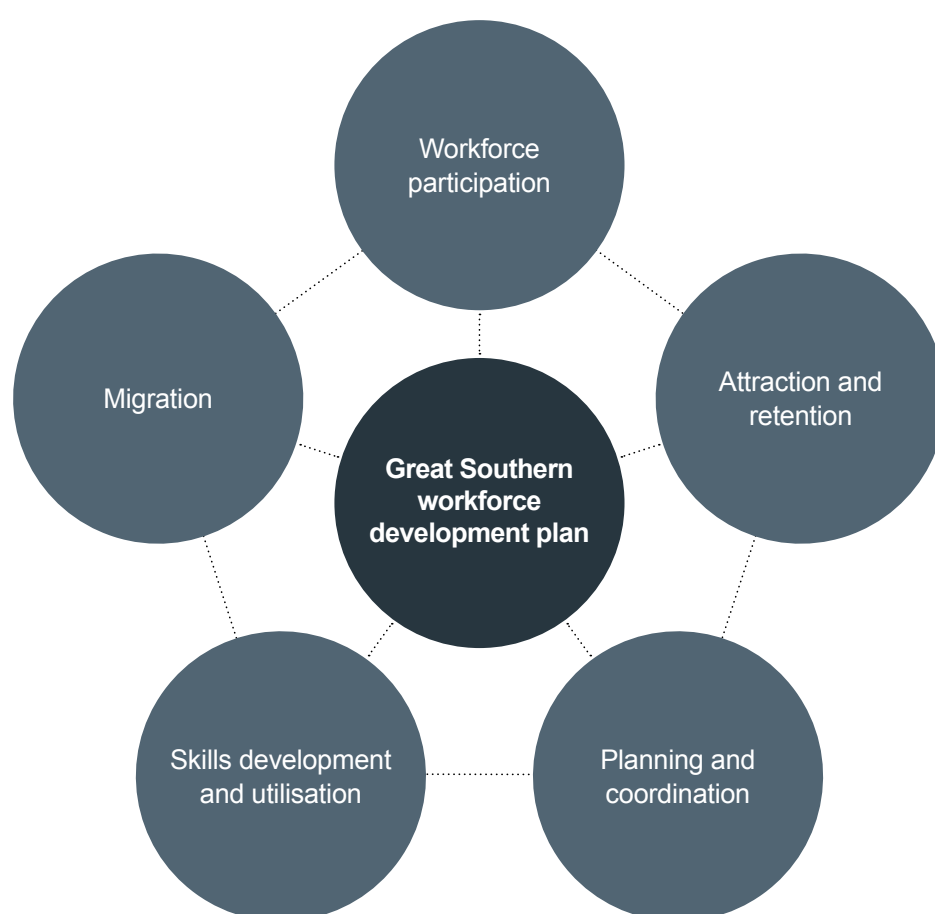


Source: ABS 2012, 2011 Census and Aboriginal and Torres Strait Islander Peoples (Indigenous) Profile

Mechanisms to meet future labour needs

In keeping with *Skilling WA – A workforce development plan for Western Australia* (Skilling WA) it is important to consider the priority issues related to the Great Southern region by identifying strategies and priority actions that relate to the five key mechanisms identified in diagram 3.1.

Diagram 3.1: Key mechanisms of the Great Southern workforce development plan



Within this context it is also necessary to be cognisant of the outcomes identified in the regional profile included in this plan, research undertaken by the 10 training councils and the Department of Training and Workforce Development's *State priority occupation list* (SPOL).

These mechanisms in turn relate to the strategic goals identified in Skilling WA provided in the shaded boxes following.

Workforce participation

This component relates to addressing issues which act as barriers to people entering or remaining in the workforce, including the under-employed and those disengaged from the workforce. In the Great Southern region this includes the following factors.

- In King, participation rates in 2011 were close to the State average. The age groups 15–29 years were slightly lower than the State average, at 63.9% compared with 68.5%. However, the 65+ age groups were higher than for Western Australia as a whole. This could be related to the increase in retirement and lifestyle communities.
- The level of participation in Pallinup was higher than the State across the majority of the age groups. The 15–19 age group recorded a lower rate than the State average (48.5% compared with 52.8%) and the 30–34 age group was also slightly lower (73.6% compared with 76%). The 65+ age groups were significantly higher than the State average. The higher participation rates in the over 40 age groups are considered to be a reflection of the relative age of the agricultural labour force in Pallinup. Across Australia this element of the labour force is often older than in other sectors.

Skilling WA: Strategic goal 1

Increase participation in the workforce particularly among the under-employed and disengaged, mature-aged workers, Aboriginal and Torres Strait Islander and other under-represented groups.

Migration

This component relates to addressing issues which impact the growth and composition of the State's population including overseas and interstate migration. In the Great Southern region this includes the following factors.

- There is a need for a more flexible skilled migration policy to enable industry to recruit suitably qualified employees, particularly in the meat industry.
- Challenges and opportunities are presented by the increasing cultural and linguistic diversity of the population.
- Youth out-migration in the Great Southern occurs primarily due to a perceived lack of educational, employment and social opportunities in the region.
- An increasing trend of out-migration of young people has significant ramification for the Great Southern as it creates difficulties in attracting young people to fill skilled job vacancies and apprenticeship positions. This trend is of particular concern given the ageing population of the region.

- At the time of the 2011 Census 15 668 people were in the 45–64 age cohort, representing 28.3% of the Great Southern population. Approximately 23.2% (12 862 people) were in the 25–44 age cohort. 20.7% of the population (11 471 people) were in the 0–14 age cohort. 30.1% of the population was aged over 55 years. This is consistent with other coastal areas in Australia that have experienced strong in-migration by retirees and lifestyle migrants over recent decades (Burnley and Murphy 2004).
- The diversity of migrant cultures in Katanning is profound and atypical of most Western Australian regional centres. This disproportionate level of multiculturalism adds vibrancy to the community, however with it comes special demands to provide language and support services beyond those typically catered for.

Skilling WA: Strategic goal 2

Supplement the Western Australian workforce with skilled migrants to fill employment vacancies unable to be filled by the local workforce and address those factors which support a growing population.

Attraction and retention

This component relates to addressing issues affecting the attraction of people into Western Australia, especially regional Western Australia, and encouraging them to stay. In the Great Southern region this includes the following factors.

- In 2011 businesses in agriculture, forestry and fishing dominated across the region in both the sub-divisions. They represented 26.2% of businesses in King and 40.7% in Pallinup. The Great Southern is dominated by small and medium enterprises. For example, in King in 2011, the majority of businesses (65%) were sole traders and 83.7% were small businesses (less than 20 employees). In Pallinup there were 1540 businesses of which 925 (60%) were sole traders.
- Research indicates that smaller businesses, particularly those with less than 10 employees are more acutely affected by skilled labour shortages than larger organisations and face issues including: the rising cost of wages, attraction of new staff and high staff turnover.
- The region generally has a lower income profile than the national average. This is largely due to the fact that the incomes earned in the Great Southern tend to reflect the structure of the economy. With the high dependence on agriculture, wages tend to be lower than in regions dependent on other industries, particularly mining. Tourism is not an industry that is considered as providing high salaries and wages. The economic flow on effects mean that other businesses are only likely to pay wages commensurate with those paid by the key industries in the region.
- Suitable housing and infrastructure can be used as effective attraction and retention tools contributing to regional development, business activity and job creation.

Skilling WA: Strategic goal 3

Attract workers with the right skills to the Western Australian workforce and retain them by offering access to rewarding employment and a diverse and vibrant community and environment to live in.

Skills development and utilisation

This component relates to addressing factors impacting the level of training participation by those in the workforce and those yet to enter the workforce. In the Great Southern region this includes the following factors.

- At the regional level, approximately 39% of people over the age of 15 had completed year 12 compared to 49% at a State level. This is a concern, as lower education levels can potentially limit employment opportunities and thereby constrain the growth of the region.
- On the other hand, both sub-divisions had much higher levels of completion to year 10 or 11, over the age of 15, than the Western Australian average.
- Availability and access to quality education post year 10 is perceived to be an issue in retaining young people in the region.

Skilling WA: Strategic goal 4

Provide flexible, responsive and innovative education and training which enables people to develop and utilise the skills necessary for them to realise their potential and contribute to Western Australia's prosperity.

Planning and coordination

This component relates to addressing issues which impact the State's, industry's and enterprise's ability to strategically manage the development of their workforce. In the Great Southern region this includes the following factors.

- There is a need for a mechanism to connect and support local businesses and enterprises in planning for their workforce requirements and committing to assist in retaining young people in the region which would increase the supply of skilled labour in the region.
- In support of regional development, local governments need to ensure there is an appropriate supply of housing land lots available to the market to meet demand, as well as town planning needs.

Skilling WA: Strategic goal 5

Plan and coordinate a strategic State Government response to workforce development issues in Western Australia.

Priority issues for the Great Southern

Summary of priority issues

The following sub-sections provide a commentary on the regional priority issues identified across the Great Southern region. They are outlined in table 4.1 based on the research and analysis undertaken in developing the regional profile section of this plan and the outcomes of the sub-regional forums and further consultations.

Table 4.1: Comparative analysis of Great Southern and sub-regional priority issues

Great Southern region				
<ul style="list-style-type: none"> • Competitive salaries and wages • Regional perceptions • Post-secondary school education opportunities • Housing 		<ul style="list-style-type: none"> • Raising Aboriginal employment • Availability/quality of health care, including specialist services • Seasonality of workers and reliance on the agriculture and related industries 		
Katanning	Albany	Denmark	Frankland	Mount Barker
<ul style="list-style-type: none"> • Out-migration • Lack of career pathways 	<ul style="list-style-type: none"> • Inadequate trade training opportunities • Access to public transport/drivers licenses 	<ul style="list-style-type: none"> • Increased demand for flexible working arrangements for work/life balance 	<ul style="list-style-type: none"> • Ease and access to diverse industry relevant training • Lack of career pathways 	<ul style="list-style-type: none"> • Ageing of the workforce • Out-migration

Competitive salaries and wages

One of the major challenges facing the public and private sector in attracting and retaining labour is the capacity to pay competitive salaries and wages.

As indicated earlier, wages and salaries tend to be lower in the Great Southern than the State average particularly in comparison to some of the resource regions, such as the Pilbara, the Mid West and Goldfields-Esperance. There are a number of important issues associated with this, including:

- inter-regional competition for labour, with some employees choosing higher wage regions ahead of the Great Southern as a place of work/residence;
- Great Southern enterprises/employers find it difficult to offer the wages/salaries provided in other regions largely because the structure of the economy is vastly different and the scale of individual businesses and projects is generally smaller; and
- attempting to compete with wages elsewhere erodes profits and the viability of enterprises, further weakening the regional economy.

It is important to note that the region has a number of competitive advantages in this area.

- Lower wages are coupled with a lower cost of living than many other regions, thus, in real terms employees can be better off when the cost of housing, goods and services are taken into account.
- The Great Southern's 'financial wage' is often coupled with a substantial 'social wage' in terms of more flexible working arrangements than those offered in some mining regions. Examples of this can include flexible hours, job sharing, part time work, deferred salary arrangements (eg 80% salary for four years with 12 months paid leave in the fifth year), salary sacrificing arrangements and so on.

Declining relative incomes are the outcome of a number of factors (Davies and Tonts 2009).

- Farm incomes have decreased in relative terms across Australia over the past two decades, which has major direct impacts on median incomes in regions with a heavy dependence on farming.
- Many businesses in the Great Southern, because of their close links to agriculture, have not been able to increase their wages in line with the State average.
- There has been a shifting geography of trade in agricultural regions with increasing amounts of business being conducted in larger regional centres, often bypassing local economies. This has led to a contraction of many private enterprises and restricted wages growth.
- Rapid increases in wages elsewhere, particularly in those regions with strong resources sectors, has contributed to a strong increase in the Western Australian average when compared to the median incomes received in the Great Southern.

The declining relative incomes in the Great Southern pose a major regional development challenge. Given the importance of competitive incomes as a means of attracting high quality, skilled employees, the inability to pay wages and salaries commensurate with other regions places firms and organisations at a disadvantage in the labour market. While other factors, such as lifestyle, environmental amenity and cost of living are also important, the international and national evidence indicates that wages and salaries are an important determinant in staff attraction and retention.

In light of the above and the quality of lifestyle available in the Great Southern it will be important to promote the complementary nature of 'social wage' and 'financial wage' opportunities available.

Regional perceptions

External perceptions and stereotypes of regions and localities can have an important impact on the capacity to recruit staff. Numerous studies have shown that perceptions about factors such as the cost of living, level of social opportunities, facilities and services and so on play an important role in the decision making processes of potential investors and migrants to a region.

Post-secondary school education opportunities

Education facilities are a critical piece of social/community infrastructure and an important issue for labour force attraction and retention, with families often leaving regional areas as children transition to high school or tertiary education. Perceptions facing rural areas include (Pelusey, Hatch and Tonts 2010):

- limited education opportunities after year 10;
- more limited year 11 and 12 course options than metropolitan schools;
- limited tertiary education options; and
- higher rates of teacher turnover and less experienced teachers in rural areas.

Changing these perceptions in the Great Southern region will be important in assisting with labour force attraction and retention and reducing youth out-migration. Another key labour force challenge in the Great Southern region is ensuring that education and training access is available to ensure not only that the skills are available but are also transferable to those that are needed. Education and training will be a key tool into the future to ensure students' skills are matched to current and future labour needs (Davies and Tonts 2007).

Housing

One of the major challenges facing regions such as the Great Southern is availability of affordable housing. Providing sufficient affordable housing in regional economies is often challenging. The supply of housing in a region like the Great Southern can be impacted by:

- the volatility of the economic environment;
- land supply;
- the level of public housing available; and
- people from the metropolitan area seeing the region as a place for a sea change or tree change.

The investment market and the rental market as well as that of home ownership can be affected by these economic and social variables. In periods of growth, the shortage of quality accommodation, particularly for rent, is a major challenge in attracting new labour.

Scarcity of housing, high costs of building and the overall lack of infrastructure, roads, supply of water and utilities has long been an issue in Western Australian regional centres and towns.

In the Great Southern, affordable housing is crucial to accommodate the unskilled and semi-skilled workforce required for retail, tourism and seasonal work in holiday, agricultural and wine growing regions. More households are under pressure to pay a higher proportion of their incomes on housing. A direct impact of this in the region is that people move from coastal communities to more affordable accommodation in communities such as those in Pallinup. Of relevance to this region is the finding that approximately 36% of rental households in Denmark were suffering financial stress.

In 2008 Haslam-McKenzie, Tonts and Davies reported that demand on housing and land throughout Western Australia had escalated in the past five years. The variability in demand and prices was evident when comparing the Great Southern coastal towns of Albany and Denmark and the inland towns of Broomehill, Tambellup and Cranbrook. The coastal towns had experienced an increase of 25% in price and demand while the inland towns showed minimal movement. Land prices had also increased in Albany, but not at the same high rate as housing.

The lack of low cost housing was an issue raised in the Regional Development Australia's *Great Southern Regional Development Plan 2010–2020*. Of particular note was the view that housing and land were needed in Denmark, Jerramungup and Mount Barker. Affordability was a key issue in Denmark and Mount Barker. In Jerramungup the concern focussed on providing accommodation to attract and retain potential residents, particularly those professionals providing essential services. Increased public housing, industrial land and retirement and aged care accommodation were also flagged. These will be important considerations in addressing workforce issues in the Great Southern.

Aboriginal employment

The need to improve Aboriginal employment was identified as a priority issue. Participation rates and unemployment rates have an inverse relationship, where high unemployment rates often cause a fall in participation rates, as people withdraw from the labour force as a result of being unable to find work (Siegal and Swanson 2004 cited in Tonts and Davies 2008). Additionally, while low participation rates reflect 'self exclusion' from the workforce, low unemployment rates often reflect 'external exclusion' where external factors prevent a person, willing to be employed, from gaining work. The Aboriginal unemployment rates in the Great Southern therefore indicate a number of external factors, such as lack of qualifications and sociocultural differences that may contribute to the unemployment rate and low participation rate in the Great Southern region.

Consistent with lower labour force participation rates, the current Aboriginal unemployment rate remains much higher than the non-Aboriginal rate. Despite the programs and services in place, employment outcomes for Indigenous Australians still tend to be lower than for non-Aboriginal people.

Health services

The WA Country Health Service (WACHS) planning team recently completed the 2012 *Great Southern Health Profile*. It identified a range of specific considerations which need to be taken into account in the planning of primary health services within the Great Southern region. Those with direct and indirect relationships with workforce planning include:

- population – the percentage of people over 65 in the region was higher than that of the State;
- emergency departments – the attendance rate has increased in the region. It is significantly higher than that of the State;
- diabetes and its complications was the leading condition for potentially preventable hospitalisations among both Aboriginal and non-Aboriginal residents;
- the hospitalisation rate for alcohol related conditions was significantly higher than that of the State; and
- determinants of health – the region has some areas with low socio-economic indexes for areas scores (WACHS 2012).

In addition, the \$170.4 million Albany Heath Campus development is likely to require the up skilling of the IT professional skill needs of its staff in the Great Southern region, resulting from the increasing use and sophistication of medical technology.

Seasonality of workforce and reliance on agriculture and related industries

Many of the industries in the Great Southern are characterised by the use of seasonal workers to supplement their workforce. An opportunity exists to increase mobility between industries by recognising and capitalising on the transferability of skills of existing workers.

Additional sub-regional themes

Out-migration

There has been considerable research into the demographic shifts affecting the region and how this might impact on the labour market. The key demographic changes include a net loss of young people, particularly in the 15–24 age cohort and to a lesser extent the 25–30 cohort. A 2007 study of the perceptions of students at Perth based universities indicated the following:

- the region was perceived as one in decline with little economic future;
- career pathways are likely to be limited if they relocate to the region;
- earning capacity was very poor when compared to other regions;
- social opportunities are minimal; and
- the region is remote and isolated (Davies and Tonts 2007).

These perceptions need to be overcome or challenged in order to ensure a steady supply of labour into the region. The perceptions of these potential employees suggest a lack of knowledge about the characteristics of the region, its diversity and the range of career and other opportunities. There were, however, a number of positive perceptions noted which include:

- low cost of living, in particular housing;
- a good region in which to get experience in senior roles sooner than may be the case in other regions;
- high quality sporting facilities and numerous opportunities to engage in sports;
- the region is a good/safe place to raise a family; and
- scenic environments and historic towns.

While changing perceptions about places is difficult, it is clear that the region's attributes, and particularly those of employers, needs to be strongly promoted.

Career pathways

One of the barriers to attraction and retention particularly in Katanning and Frankland is a view that opportunities for career progress are often poor. Employees often see regional employment as a 'stepping stone' in the workforce ladder, rather than a place to build a long term career. As a result, employment can be transitory. This has significant implications for employers in terms of recruitment costs and training.

Access to diverse industry relevant training

The availability and quality of education facilities, particularly secondary schools, is a key concern for the community and a critical decision making factor for people moving to the region. Numerous studies point to the transition to high school and post-school, as one where rates of out-migration tend to be high. The availability and quality of education facilities is often a key component of decision making with regards to migration.

The Great Southern region has educational facilities ranging from preschool to vocational education and University of Western Australia's Albany Centre in Natural Resource Management.

It is important to note that the Community Resource Centres located throughout the region provide important access points to education and training.

An opportunity also exists to increase the availability and access to diverse industry relevant training, particularly in Katanning, as part of its development as a SuperTown.

Transport

As part of its *Economic Development Strategy (2010–2015)*, the City of Albany plans to advocate for improvements to the airport infrastructure to accommodate jet services should they be introduced as a Regular Public Transport service.

In addressing the proposal for Katanning as a SuperTown, the draft *Katanning SuperTown growth and implementation plan* (March 2012) referenced the current and proposed value and use of the Katanning Airport.

The issue of a fly-in fly-out workforce is of significance to the role of airports in the region in supporting economic and community development. Fly-in fly-out services will put considerable strain on the existing facilities and will impact on the ways in which the local community uses and has access to the airport facilities and services. In December 2011 Rio Tinto announced an expansion of its regional fly-in fly-out services from Albany to their Brockman Operations in the Pilbara.

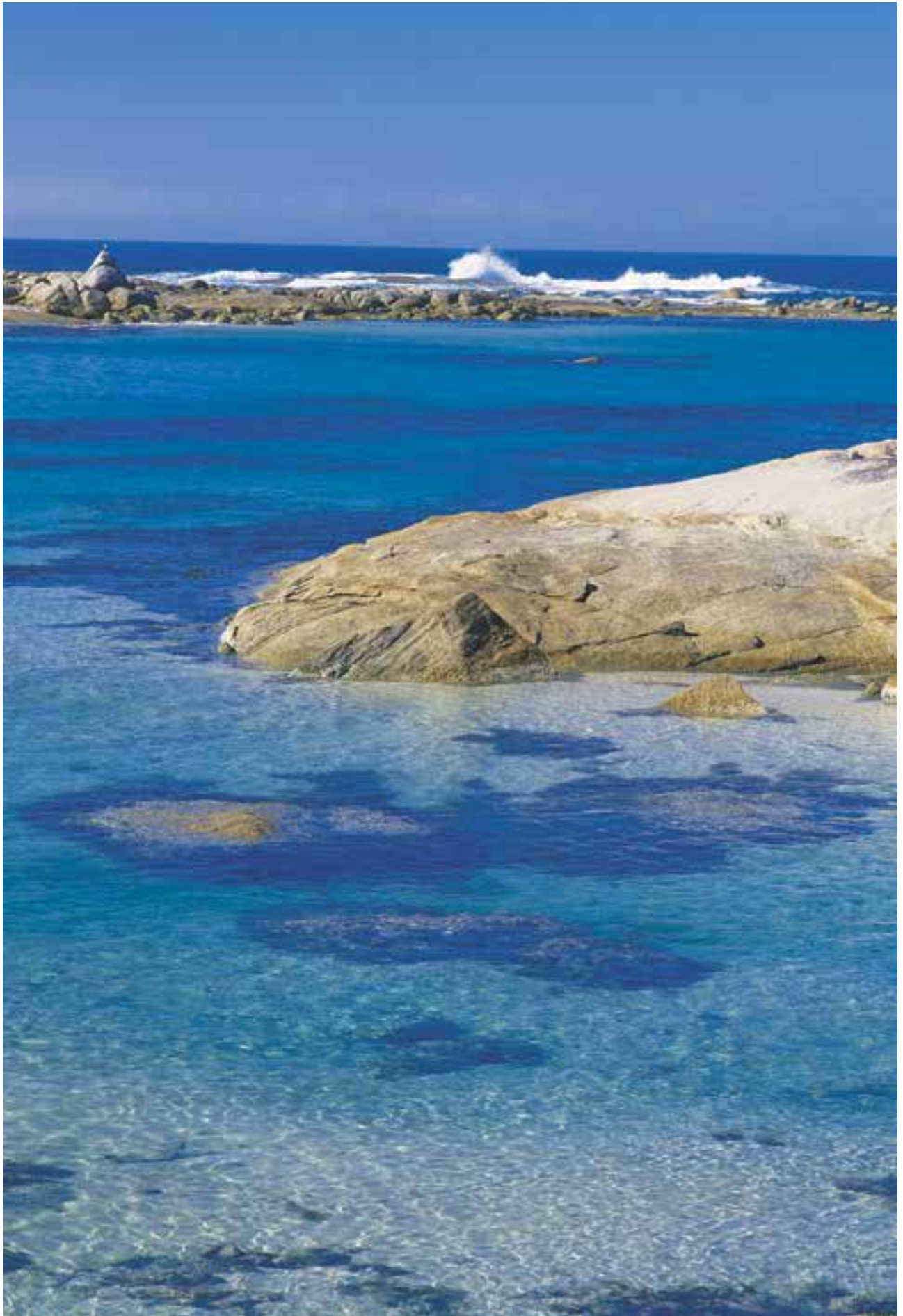
Issues associated with under-representation in the workforce that emerged during the consultations, highlighted that residents without access to vehicles or drivers licences were potential labour force participants. While statistics of the number of people unable to drive in the sub-regions who are potentially dependent on access to a vehicle to travel to and from work are not available, anecdotal evidence suggests that a good proportion of the long term unemployed might fall into this category.

In addition, the introduction of new laws requiring the accumulation and recording of a minimum of 50 hours supervised driving experience and a mandatory six month waiting period after passing the practical driving assessment for youth seeking to get their licences, presents difficulties for parents/guardians who may be facing multiple challenges of their own.

Ageing workforce

One of the other major areas of concern identified, particularly in the King sub-division, is the relative ageing of the workforce and the need for more flexible working arrangements to provide an improved work/life balance. The sectors with the oldest age structures include: agriculture, forestry and fishing; manufacturing; transport, health care and social assistance; and utilities. In almost every sector, the workforce is older than the State average. This poses significant risk to the region, since there is a need to find replacements for these workers to fill the gaps emerging in the labour market. However, this need comes at a time when comparable sectors in other regions are offering higher wages.

Clearly one of the most important issues associated with this theme is the impending retirement of many baby boomers from the labour market. Over the next 10–15 years much of this generation will leave the labour force and need to be replaced. This raises questions about how they might best be replaced and also ways of retaining this generation's engagement in the labour force for longer periods, such as on part time or flexible workplace arrangements.



Future workforce needs for the Great Southern region

Future labour force demand

According to the ABS *Value of Agricultural Commodities Produced, Australia 2010–11*, the gross value of Western Australia's agricultural commodities was \$5.387 billion of which \$787 million was contributed by the Great Southern.

The main agricultural industries include broadacre cropping, livestock and wool. However, horticulture and viticulture are becoming more prominent.

There are major sheep and lamb export abattoirs at Katanning and Narrikup and a third, and smaller sheep, lamb and goat export abattoir at Beaufort River. Growth has also been experienced in industries such as:

- timber;
- light engineering;
- tourism;
- food and wine;
- aquaculture; and
- bush products.

The operation of the Albany Port is also a key part of the economy. Increasingly it is being used as a stop over port for cruise ships. However, as an agricultural port it is susceptible to seasonal variations and market demand for the commodities which pass through the port. Notwithstanding this, it is important to note that other opportunities, including those within the resources sector, may occur within the region which could have a positive impact on the operations of the port in the future.

According to research undertaken by Regional Development Australia – Great Southern, the three main employment providers in 2009 in the region were:

- agriculture, forestry and fishing;
- retail trade; and
- health and community services.

Of the top 20 employers in the region (by number of employees) government departments employ 65% of the workforce. The largest employer is the Southern Country Health Service followed by the Department of Education. Opportunities therefore exist to investigate ways of improving public sector career pathways in the Great Southern, as a means of attracting and retaining experienced public servants.

At the local level, particular projects, locational attributes, attraction and retention issues drive occupational needs. Given that these will differ considerably from place to place, an important part of the forums and consultations associated with the development of the plan was to identify these and how they differ from the broader regional picture presented previously.

There are a number of key economic drivers for the Great Southern including:

- primary agriculture production including wool, broadacre cropping, livestock, forestry and fishing;
- retail;
- tourism;
- land use – residential, commercial, industrial and agricultural; and
- industry including transport infrastructure.

From the various studies undertaken of the Great Southern, it can be seen that the region's economy is expected to expand and its population increase. In many cases, the most significant growth was likely to be concentrated in the south of the region, particularly in the local government areas of Albany, Denmark and Plantagenet. To the north of the region, a modest decline or relative stability was expected due to the predominance of agriculture.

Great Southern regional priority occupation list (RPOL)

The Department of Training and Workforce Development prepares a *State priority occupation list* (SPOL) which is an annually produced list of skilled occupations in high demand or considered industry critical in Western Australia.

As part of the preparation of the regional workforce development plans, the Department is keen to complement this State level information with an assessment of priority occupations at the regional and, where possible, the sub-regional level.

Table 5.1 presents a summary of the priority occupations identified during the sub-regional forums and consultations.

Table 5.1: Great Southern regional (and sub-regional) priority occupation list

Great Southern region				
<ul style="list-style-type: none"> • Farm, forestry and garden workers • Food process workers • GPs and medical specialists • Hospitality workers • Licensed trades 		<ul style="list-style-type: none"> • Mobile plant operators • Nursing and midwifery professionals • Personal carers and assistants • School teachers 		
Katanning	Albany	Denmark	Frankland	Mount Barker
<ul style="list-style-type: none"> • Building and construction trades • Clerical and office support • IT specialists • Office and practice managers 	<ul style="list-style-type: none"> • Mental health workers • Work safe assessors 	<ul style="list-style-type: none"> • Cleaners and laundry workers • Dentists • Finance and insurance clerks • Sales assistants and sales persons 	<ul style="list-style-type: none"> • Cleaners and laundry workers • Clerical and office support • Office and practice managers 	<ul style="list-style-type: none"> • Accountants • Civil engineers • Mechanics – auto and diesel

While further refinements to the RPOL will be made as part of the ongoing review of the regional workforce development plan, table 5.2 provides a starting point. It was developed based on qualitative and quantitative research undertaken as part of this project.

Table 5.2 provides a comparative analysis and triangulation (at the six digit ANZSCO level) of:

- regional and sub-regional priority occupations identified by participants in sub-regional forums;
- priority occupations identified in the regional profile prepared as background to the Great Southern workforce development plan 2013–2016 and utilised as the starting point for discussion at the sub-regional forums; and
- priority occupations identified in the 2012 State priority occupation list (SPOL).

It is worth noting that the SPOL contains:

- State priority 1 (SP1) occupations characterised by a combination of one or more of the following factors:
 - very large levels of employment;
 - high forecast growth and evident wage pressures; and
 - consistent identification across a range of indicators as an industry-critical occupation.
- State priority 2 (SP2) occupations characterised by:
 - notable levels of employment;
 - medium level forecast employment growth; and
 - identification across a range of indicators as an industry-critical occupation.

Of the 33 priority occupations (excludes the three digit ANZSCO level²⁰) identified in the Great Southern regional priority occupation list (RPOL), 15 (46%) are also included in the SPOL with seven (21%) of them included as SP1 occupations.

Similarly, almost 50% of them (16) appear in the regional profile and almost 22% (four) are in both the regional profile and the SPOL. Seven of them appear on neither and possibly reflect needs at the local level which emerged as part of the priority issues identified as regional or sub-regional concerns and warrant noting for further research into local workforce implications.

This variation, together with the alignment between the Regional Profile and the SPOL, highlights the value of undertaking research at the local level.

²⁰Further research will be required to identify priority occupations within this area.

Table 5.2: Great Southern regional priority occupation list (RPOL)

ANZSCO	Occupation	Consultation outcome	Regional profile	SPOL
121	Farmers and farm manager	Regional	✓	
132211	Finance manager	Denmark	✓	SP2
221111	Accountant (general)	Mount Barker		SP2
222113	Insurance broker	Denmark	✓	SP2
233211	Civil engineer	Mount Barker		SP2
234212	Food technologist	Regional	✓	
241213	Primary educator	Regional	✓	SP1
241411	Secondary educator	Regional	✓	
252312	Dentist	Denmark		
253111	General medical practitioner	Regional		SP1
254111	Midwife	Regional	✓	SP1
254411	Nurse practitioner	Regional	✓	
254422	Registered nurse (mental health)	Albany		SP1
312611	Safety inspector	Albany		
313199	ICT support technician	Katanning		
321211	Motor mechanic (general)	Mount Barker		SP1
323211	Fitter (general)	Katanning		SP1
331111	Bricklayer	Katanning		SP2
331212	Carpenter and joiner	Katanning		SP2
332211	Painting trades worker	Katanning		SP2
334111	Plumber (general)	Regional		SP2
341111	Electrician (general)	Regional		SP1
423313	Personal care assistant	Regional	✓	
431511	Waiter	Regional		
431999	Hospitality worker	Regional		
512111	Office manager	Katanning Frankland	✓	
599999	Clerical and administrative worker	Katanning Frankland	✓	
621111	Sales assistant (general)	Denmark		
721999	Mobile plant operator	Regional	✓	
811211	Commercial cleaner	Denmark	✓	
811511	Laundry worker (general)	Denmark Frankland	✓	
821111	Builder's labourer	Katanning		
841311	Forestry worker	Regional	✓	
841412	Nursery hand (horticulture)	Regional	✓	



Great Southern workforce development – the way forward

Introduction and scope

The regional workforce development plans being developed by regional workforce development alliances provide a whole of government, industry and community sector approach to providing services, infrastructure and support for the nine regions in Western Australia.

Specific government, industry and community based agencies will be given the ‘lead’ responsibility to coordinate strategies and projects agreed to and included in this plan. These strategies and projects are aligned to the five strategic goals of Skilling WA. In this way, the *Great Southern workforce development plan 2013–2016* can also be used to inform the development of Skilling WA.

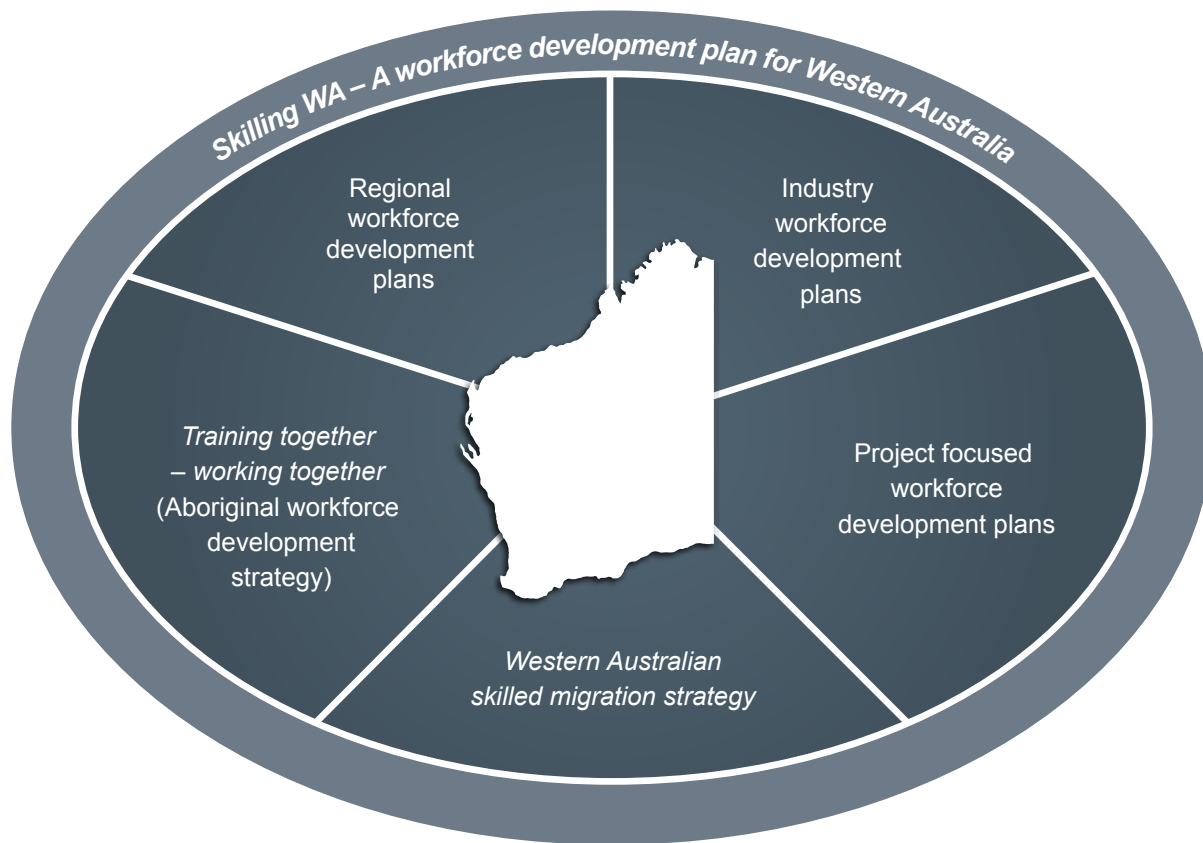
The *Great Southern workforce development plan 2013–2016* is intended to provide a broad assessment of the workforce development trends and issues in the region. It does not aim to tackle in depth all of the various issues and scenarios associated with employment in the region but aims to develop a more general analysis of problems, likely solutions and required actions.

Roles, responsibilities and partnerships

Skilling WA recognises the significant impact Western Australia’s regional communities, diverse range of industries and multicultural population have on the State’s economy, while also acknowledging the unique challenges this presents. To meet these challenges, the Department of Training and Workforce Development has developed an integrated workforce planning and development process.

This integrated process shown in figure 6.1 will ensure that the specific needs of industries, regions and those under-represented in the workforce, as well as major projects and enterprises are addressed. Governments, industry, community, education and training providers, enterprises, new job seekers and workers all have a role to play in meeting the workforce development needs of the State. Only in partnership with these stakeholders will the State address the skill and labour demands of our industries and provide the opportunity for all Western Australians to benefit from our growing economy.

Figure 6.1: Outputs from Western Australian workforce development planning



Source: Department of Training and Workforce Development, 2010

Timeframe

While the *Great Southern workforce development plan 2013–2016* has a four year timeframe, Skilling WA will be regularly reviewed and updated by the Department of Training and Workforce Development. The Department will continue to engage with Western Australian industries, government agencies, workers, the education and training sector and other key stakeholders to identify emerging trends and issues impacting on workforce development. Further, the Department will work with these stakeholders to identify and implement strategies to address these issues.

The Department of Training and Workforce Development will be responsible for the regular review of economic and labour market data. The Department will also continue its ongoing consultation with key workforce development partners to monitor the State's progress in achieving its workforce development goals and priority actions.

The status of the outcomes will be the subject of ongoing review, with progress reported to the Ministerial Taskforce on Approvals, Development and Sustainability on a quarterly basis. These rigorous measures will ensure that Skilling WA remains up to date and relevant and that it achieves its objective of planning for the current and future workforce development needs of Western Australia.

Action plan

In summary an overview of the drivers for the emerging actions in the *Great Southern workforce development plan 2013–2016* include, but are not limited to the following points.

- The Great Southern region is one which has close to full employment.
- The economic drivers during the period 2013–16 are clearly associated with agriculture (and related industries), forestry and tourism. The key characteristics of these industries are that there is a strong seasonality factor in the workforce needs of their sub-industries.
- There is an increasing trend for some businesses to import labour from overseas to fill skills shortages which highlights the need for improved settlement processes, particularly for those from non-English speaking countries. Examples include the abattoirs operated by the Western Australian Meat Marketing Cooperative (WAMMCO) in Katanning and Fletcher International in Mount Barker who were acknowledged for their role in attracting both migrants and humanitarian entrants to the region.
- While the resources sector is not a major driver at this time, there may be future prospects in this area which could have an impact on the region.
- In addition, Western Australia is gearing up for resource projects statewide and the Great Southern region is likely to be a key recruiting ground. Hence both internal and external impacts of this industry sector are likely to have a bearing on this region.
- Another characteristic in the Great Southern region during this period will be the impact of out-migration of young people and in-migration of retirees.
- In terms of attraction and retention of the workforce, the consultations revealed education and health are key areas that will need to be addressed during 2013–16.
- It is likely that in the foreseeable future skilled and humanitarian labour migration are going to be significant in addressing the seasonality of the workforce needs and the direct and indirect consequences of the anticipated resource sector projects. This will require opportunities for training, particularly in language and literacy and support services for humanitarian refugees to assist them settle in the Great Southern region.
- In addition, it is evident that there is currently under participation within the existing population, including Aboriginal people and people with disability (including mental health) that could be trained, skilled and supported to address the workforce needs of a relatively stable population within the Great Southern region.

The following action plan is based on a series of strategies that emerged during the consultations undertaken in the preparation of the *Great Southern workforce development plan 2013–2016*. These strategies fall into two broad categories including direct and indirect incentives.

Direct employee incentives

- Wages
- Housing loan support
- Accommodation subsidies
- Relocation allowances
- Salary packaging
- Travel assistance
- Flexible working conditions
- Retention bonuses
- Education/training support
- Child care support

Indirect incentives

- Health services
- School education
- VET pathways
- Higher education opportunities
- Public transport
- Social and cultural opportunities
- Aged care facilities
- Land development
- Affordable housing
- Child care services

The priority actions proposed provide practical solutions to a number of complex workforce development challenges. They have been designed to enable government to adequately plan and resource workforce related strategies and for the region's employers to advise government and implement workforce planning initiatives in their workplaces.



Photo courtesy Colin Richardson.

Priority issue	Recommended priority actions	Skilling WA – strategic goal(s)
1. Skills development and utilisation	1.1 Department of Training and Workforce Development in collaboration with local industry and the Great Southern Institute of Technology to further identify priority workforce and skill needs of Katanning as a sub-regional centre and designated SuperTown.	4.3
	Lead agency: Department of Training and Workforce Development	
	1.2 The Great Southern Institute of Technology to collaborate with the Department of Training and Workforce Development and Great Southern education providers, including North Albany Senior High School, with the view to offering education, training and employment pathways that align with the region's industry workforce needs particularly in relation to health and human services.	4.1
	Lead agency: Great Southern Institute of Technology and the Department of Training and Workforce Development	
	1.3 North Albany Senior High School, with its partnership with Great Southern Institute of Technology, proposed trade training centre and growing support from regional industry, to promote itself as a secondary school specialising in vocational education and training pathways.	4.1
	Lead agency: Department of Education	
	1.4 The Great Southern Institute of Technology in collaboration with regional hospitals in the Great Southern and the Department of Training and Workforce Development, to investigate the feasibility of offering additional enrolled nursing training places.	4.2
	Lead agency: Great Southern Institute of Technology	
	1.5 The Department of Training and Workforce Development and the relevant Australian Government agencies to collaborate with Great Southern industry associations and other regional stakeholders to jointly conduct forums to promote industry uptake (including small business) of apprentices and trainees.	4.1
	Lead agency: Department of Training and Workforce Development	
	1.6 The Southern Country Health Service to enhance, where required, the IT skills of its staff in the Great Southern region in line with increasing use and sophistication of medical technology.	4.2
	Lead agency: Southern Country Health Service	
	1.7 The Small Business Centre – Great Southern, regional business associations and the Great Southern Institute of Technology to collaborate to promote and deliver flexible small business training to meet the professional needs of small business owners throughout the Great Southern.	4.3
	Lead agency: Small Business Centre – Great Southern	

Priority issue	Recommended priority actions	Skilling WA – strategic goal(s)
1. Skills development and utilisation	1.8 The Great Southern Institute of Technology in collaboration with the Department of Training and Workforce Development to consult with industry in Mount Barker and to identify appropriate industry focused training.	4.1
	Lead agency: Great Southern Institute of Technology and the Department of Training and Workforce Development	
	1.9 Great Southern Institute of Technology and the UWA Albany Centre to investigate the feasibility of offering a higher education qualification in agriculture for graduates of regional agricultural colleges and secondary schools.	4.3
	Lead agency: Great Southern Institute of Technology	
	1.10 The Department of Training and Workforce Development in conjunction with Great Southern Institute of Technology collaborate with, the Food Fibre and Timber Industry Training Council, farmer representative associations and the Department of Agriculture and Food to define appropriate skill sets and promote Recognition of Prior Learning (RPL) and training delivery that supports increased workforce mobility for the farm workforce in the Great Southern.	4.3
	Lead agency: Department of Training and Workforce Development and the Great Southern Institute of Technology	
2. Migration	2.1 The Department of Training and Workforce Development and representative industry associations, to explore with the Department of Immigration and Citizenship mechanisms within the national migration program to meet the seasonal needs of many of the Great Southern's industries and the skill needs of the region's emerging resource sector.	2.1
	Lead agency: Department of Training and Workforce Development	
	2.2 The Department of Training and Workforce Development in conjunction with the hospitality industry to advocate with the Department of Immigration and Citizenship the feasibility of extending the existing working holiday visa arrangements to include cafes, restaurants and hotels as a means of addressing the skill shortages in the hospitality industry in the Great Southern.	2.1
	Lead agency: Department of Training and Workforce Development	
	2.3 The Department of Training and Workforce Development, in collaboration with the Great Southern Development Commission, the Office of Multicultural Interests and the Department of Immigration and Citizenship to investigate the provision of migrant support services in the Great Southern, particularly Katanning, to assist with family settlement issues including language and literacy, employment and training.	2.1
	Lead agency: Department of Training and Workforce Development	

Priority issue	Recommended priority actions	Skilling WA – strategic goal(s)
3. Workforce participation	3.1 Great Southern Institute of Technology to continue to work closely with the region's Aboriginal communities to encourage increased participation of Aboriginal students in health and related courses including the provision of support to enable them to complete their studies and gain employment.	1.2
	Lead agency: Great Southern Institute of Technology	
	3.2 The regional office of the Department of Education to investigate the year 12 completion rate of Aboriginal students attending schools in the Great Southern with the view to developing 'best practice' participation and retention strategies which include addressing issues associated with transition from school to employment/further education and training.	1.2
	Lead agency: Department of Education	
	3.3 The Department of Training and Workforce Development in conjunction with local training providers and employer representatives to further encourage apprenticeships and traineeships for: <ul style="list-style-type: none"> • Aboriginal youth; and • People with a disability including mental illness. 	1.2
	Lead agency: Department of Training and Workforce Development	
	3.4 Department of Training and Workforce Development to assess options for servicing the co-ordination and information needs for Aboriginal training and employment in the Great Southern.	1.3
	Lead agency: Department of Training and Workforce Development	
	3.5 Regional industry and employers to provide more flexible working arrangements such as part time work to target older workers including those transitioning to retirement.	1.2
4. Attraction and retention	Lead agency: Regional industry and employers	
	4.1 The Public Sector Commission to investigate ways of improving public sector career pathways in the Great Southern, as a means of attracting and retaining experienced public servants.	3.1
	Lead agency: Public Sector Commission	
	4.2 The Department of Health to continue to pursue opportunities to work with both regional and metropolitan centres to accommodate patient needs and improve patient outcomes through the Telehealth services.	3.2
	Lead agency: Department of Health	

Priority issue	Recommended priority actions	Skilling WA – strategic goal(s)
4. Attraction and retention	4.3 As part of the implementation of the Affordable Housing Strategy 2010–2020, the Department of Housing to work with the Great Southern Workforce Development Alliance to identify appropriate housing through the social and affordable housing demand model and to determine whether a more targeted policy is required for the Great Southern region, in particular the nominated SuperTown of Katanning.	3.2
	Lead agency: Department of Housing	
5. Planning and coordination	5.1 Great Southern Institute of Technology, its partnering universities, regional hospitals and aged and community service providers form the Great Southern Regional Health and Human Services Alliance to plan and co-ordinate the delivery of industry related education, training and employment pathways, particularly in nursing and aged and community care.	5.2
	Lead agency: Great Southern Institute of Technology	
	5.2 UWA's Albany Centre and the Great Southern Institute of Technology, which currently offers seven higher education courses in partnership with other universities, to collaborate with respect to the planning and delivery of future higher education courses.	5.2
	Lead agency: Great Southern Institute of Technology	
	5.3 The Great Southern Development Commission to monitor the various emerging major resource projects and, where necessary, commission social impact studies to help identify and inform State Government of the likely impact on the region's workforce, infrastructure and services.	5.2
	Lead agency: Great Southern Development Commission	
	5.4 The Great Southern Development Commission to collaborate with local governments throughout the Great Southern to investigate the establishment (where they don't already exist) of Aboriginal Accords as a means of engaging their local Aboriginal communities and involving them in community development and local employment opportunities.	5.2
	Lead agency: Great Southern Development Commission	
	5.5 The Small Business Centre – Great Southern to identify and implement strategies which assist with the establishment and support for Aboriginal business enterprises in the Great Southern.	5.2
	Lead agency: Small Business Centre – Great Southern	

Priority issue	Recommended priority actions	Skilling WA – strategic goal(s)
6. Governance and management issues	6.1 The Department of Training and Workforce Development to further refine the methodology and modelling for the establishment of the Great Southern Regional priority occupations list (RPOL) to better inform its market led training and purchasing strategies and future infrastructure investment in the region.	4.1, 4.3 and 5.1
	Lead agency: Department of Training and Workforce Development	
	6.2 The Department of Training and Workforce Development, with the support of the Great Southern Development Commission, to ensure the Great Southern Workforce Development Alliance has the appropriate levels of support to monitor and review the progress of the region's workforce development plan.	5.2
	Lead agency: Department of Training and Workforce Development	





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Appendix A: Great Southern consultation list

Forum consultations²¹

Name	Organisation
Margaret Fahey	Albany Hospital
Linda Thompson	Albany Worklink
Jerome Vann	Apprenticentre
Mark Di Silva	Ausgold Limited
Lynne Ward	Community First
Geoff Belz	Department of Education, Employment and Work Relations
Diana Burl	Design & Drafting
David Love	Electrical, Utilities and Public Administration Training Council
Jan Upton	Financial, Administrative and Professional Services Training Council
Russell Pritchard	Great Southern Development Commission
Geoff Bowley	Great Southern Employment Development Inc
Cassie Coldwell	Great Southern Institute of Technology
Sue Dybing	Great Southern Institute of Technology
Kathy Keay	Great Southern Institute of Technology
Donna Bright	Great Southern Institute of Technology
Shirley Hansen	Great Southern Institute of Technology
Neil Binning	Great Southern Institute of Technology
Cathy Glen	Great Southern Institute of Technology
Jan Davidson	Great Southern Institute of Technology

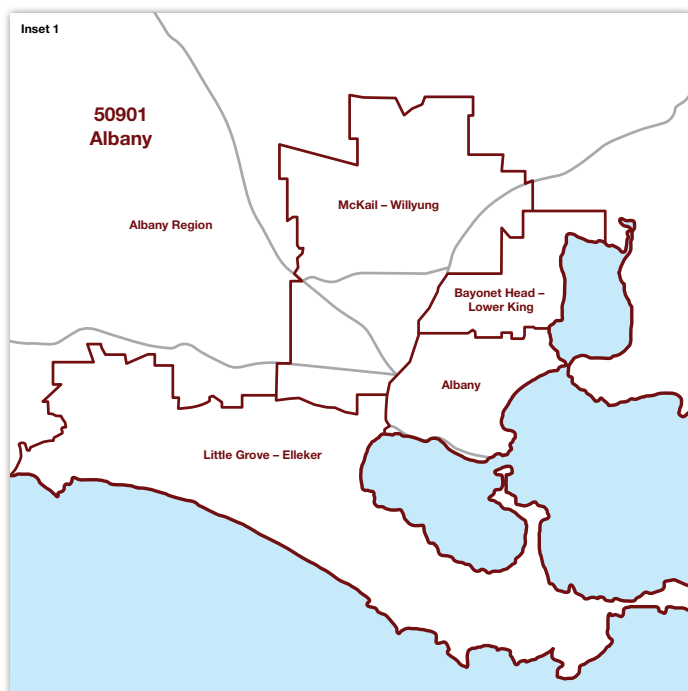
²¹ Please note that some registrants arrived late or left early (didn't sign the attendance form), some attended multiple forums and some were also interviewed individually during the project.

Name	Organisation
Sue Bennett-Ng	Great Southern Institute of Technology
Chris Jones	Great Southern Institute of Technology
Tracey Neilson	Great Southern Personnel
Louise Duxbury	Green Skills Inc
Diane Evers	Green Skills Inc
Joe Lembo	MLG
Simon Lyas	Regional Development Australia – Great Southern
Pene Cuthbert	Regional Development Australia – Great Southern
Cassandra Stipanicev	Shire of Cranbrook
Jan Pope	Shire of Cranbrook
Dale Stewart	Shire of Denmark
Andrew Holden	Shire of Katanning
Rob Stewart	Shire of Plantagenet
Paul Beattie	Southern Aboriginal Corporation
Jo Webb	WA Country Health Service
Shirlene Higgs	WA Department for Communities
Perdita Beebe	WA Department for Communities
Trudy Clarke	WA Department of Agriculture and Food
Heather Mahar	WA Department of Education
Gail Wright	WA Department of Education
Glenn Jones	WA Department of Human Services
Anthony Bessell	WAMMCO

Additional consultations

Name	Organisation
Alan Davis	Building and Construction Training Council
Greg Thornton	CBH
Faileen James	City of Albany
Ian Andrews	Community Services, Health and Education Training Council
David Love	Electrical, Utilities and Public Administration Training Council
Dave Hicks	Engineering and Automotive Training Council
Allan Jones	Financial, Administrative and Professional Services Training Council
Greg Cross	Fletcher International
Brad Armstrong	Food, Fibre and Timber Industries Training Council
Mal Gammon	FutureNow Creative and Leisure Industries Training Council
Bruce Manning	Great Southern Development Commission
Lydia Rozlapa	Great Southern Institute of Technology
Jillian Dielesen	Logistics Training Council
Nigel Haywood	Resources Industry Training Council
Norma Roberts	Retail and Personal Services Training Council
Bill Parker	Shire of Jerramungup
Peter Butler	Skill Hire
Vicki Brown	Small Business Centre - Great Southern
Daniela Mattleys and Jim Wyatt	WA Department of Commerce
Neil Milligan	WA Department of Education
Lester Coyne	WA Department of Health
Jay Cook	WA Department of Indigenous Affairs


Appendix B: Great Southern ABS 2011 – statistical boundaries 2011



Source: ABS Australian Statistical Geography Standard Volume 1 – Western Australia Maps, 2011

Notes:

Notes:



For further information or to provide comment on the plan,
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