



Wimmera Southern Mallee Regional Skills Demand Profile 2023



**Victorian
Skills Authority**



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and Regions



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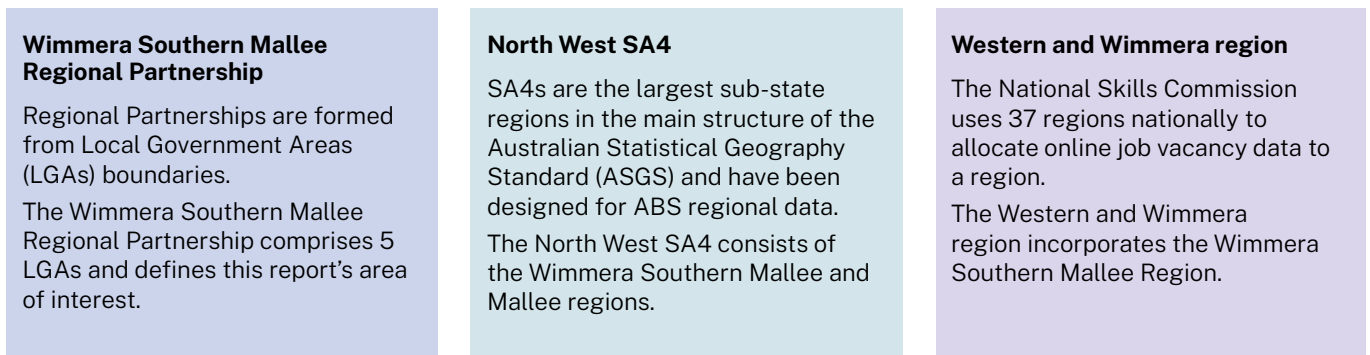
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The Victorian Skills Authority (VSA) has a critical role to play in understanding and communicating the skills needed to ensure Victoria can meet current, emerging, and future skills and industry demands that enable inclusive growth and prosperity for all Victorians. Working together with key stakeholders across industry, employers, providers, unions, communities and learners – the VSA seeks to deliver skills-led solutions, drive reform and collaborate to improve skills and employment outcomes.

The profile draws from 3 levels of data, using the most granular data available when reliable. The boundary of Wimmera Southern Mallee is defined by the Regional Partnership regions used by Regional Development Victoria. Figure 1 describes the relationship between the regions^{1,2} Data can be assumed to be for the Wimmera Southern Mallee region unless referenced as otherwise.

Figure 1: Relationship between regions and the 3 levels of data.



The Wimmera Southern Mallee profile is complementary to the Wimmera Southern Mallee Regional Economic Development Strategy (REDS). The profile draws on the REDS in addition to other sources. Due to the specific focus and need of the profile, alternative data has been required for aspects of the analysis. As a result, some data and information may differ between the REDS and the profile. The data and information provided in the profile has been validated and adjusted with a taskforce comprised of industry leaders and education providers from across the region.

Data in this profile

The Victorian Skills Plan provides the Victorian Government and skills and training system with high-quality information to best meet industry and community needs. The VSA is committed to building data and insights year on year through the annual Victorian Skills Plan and updates to the employment forecast dashboard.

This profile reflects most up to date data and statistics available in 2022, during the period of taskforce meetings and profile development. The data is aligned to the 2022 Victorian Skills Plan and various reputable sources were incorporated, as referenced throughout the profile.

The projections reflect the economic outlook and uncertainty of the time. The pace of the pandemic recovery, return of migration, supply chain issues, inflationary pressures and the Russian invasion of Ukraine have all contributed to a rapidly changing economic and labour market outlook in the last 18 months.

The VSA is currently updating its data for the 2023 Victorian Skills Plan. The update will reflect the changed economic conditions noted above, as well as improvements in the modelling techniques used to estimate employment across the regions. For this reason, the data in the profiles is likely to change with the release of the new Victorian Skills Plan, set to be released in late 2023.

To access the latest data, readers are directed to the Victorian Skills Authority employment forecast dashboard: www.vic.gov.au/victorian-skills-plan and the Regional Economic Development Strategies (REDS) interactive data dashboards: <https://www.rdv.vic.gov.au/resources/regional-economic-development-strategies>





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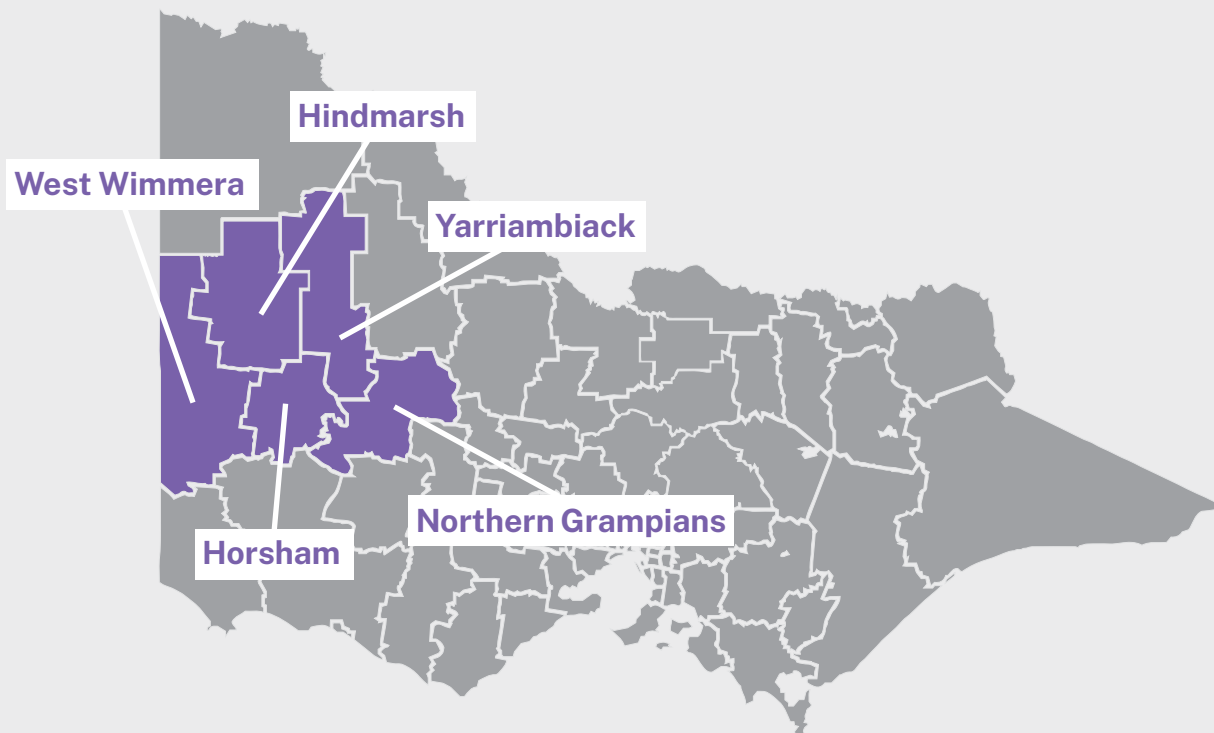
Executive summary

This profile focuses on a 3-year outlook for Wimmera Southern Mallee, and the education and training opportunities that can help to develop the workforce required for the region.

About the Wimmera Southern Mallee region

The Wimmera Southern Mallee covers a large area in the west of Victoria, encompassing the local government areas of Horsham Rural City and the Shires of Hindmarsh, Northern Grampians, West Wimmera and Yarriambiack. The region is home to the Wotjobaluk People, being the Jaadwa, Jadawadjali, Wergaia and the Jupagalk alongside the Dja Dja Wurung People, as well as other Traditional Owner groups who are not formally recognised, who have lived, worked and cared for their Country and resources for many thousands of years.

Figure 2: Local Government Areas (LGAs) in the Wimmera Southern Mallee Region



The Wimmera Southern Mallee boasts natural assets and competitive industries. The region's natural assets include plentiful farmland, lakes, rivers, mineral sand deposits, and mountain ranges, support agriculture, mineral sands mining, and tourism industries.³ A significant food product manufacturing industry is built upon the region's agricultural strengths, advantageous location on the main road transport route between Melbourne and Adelaide, and freight rail connections to major ports in Geelong, Portland and Melbourne.⁴ The flow of income from the workforce and households creates a natural demand for service industries in the region, such as construction and health care and community services. These key industries are supported by a range of wrap-around industries, including education and training, public administration and safety, and utilities and professional services.

The region is home to an estimated population of 48,400 people, with about 40% of this population in Horsham.⁵ The region has historically encountered a gradual decline in population, but has the potential to grow in coming years.⁶ People seeking a regional lifestyle following the COVID-19 pandemic, an increase in jobs available in the region and a lower tendency of young people leaving the region to pursue education or employment are likely to contribute to population growth.



The Wimmera Southern Mallee region is at an important juncture.

Comprising a range of natural assets and critical industries, the region contributes considerably to Victoria's economy and has the potential to extend its influence and impact through growth in a number of areas.

The Wimmera Southern Mallee is poised for economic growth across key industries in the next 3 years. A strong agricultural presence creates opportunities for growth, as technological advancements push businesses to become more efficient. The increasing uptake of technology will create demand for higher skilled workers who can work alongside advanced technology. The strong agricultural base also creates an opportunity for the food product manufacturing industry to combine multiple production phases to create 'paddock to plate' products that meet consumer demand.

The region's natural-based tourism experiences are set to attract visitors to the region as tourism increases post-pandemic, creating flow-on demand for the retail trade, accommodation and food service sectors. Natural endowments also present opportunity for the mining industry, with the region's mineral sands deposits in high global demand and the development of wind farms highlighting the region's clean energy production potential. These industries hold the potential for long-term, large-scale growth, but will require a large-scale workforce, likely with an augmented skill mix.

Population movement from metropolitan areas to the region, job creation and government stimulus will create demand for service-based industries. Investment is underway to expand service and infrastructure capacity to meet this demand, including high levels of residential construction activity and upgrades to hospitals and community service providers. Government reform in family violence, mental health, disability, aged care and education is changing the nature of services. Meeting this demand will be contingent on the availability of a highly skilled workforce.

Demographic and socio-economic context

The region is home to an ageing population and population has historically been in gradual decline, but has the potential to grow in coming years as the trend of domestic migration to regional areas continues and employment opportunities grow in the region. Low unemployment coupled with the high participation rates, an ageing workforce and historically slow population growth underpins the labour supply challenges for the region.

Outlook on jobs growth

Employers will seek an additional 1,700 to 2,400 workers to meet demand in the next 3 years. On top of new worker demand, 1,210 workers are required to replace retirements. Table 1 provides estimates of workforce growth across key industries, based on data analysis and insight provided by a taskforce of representatives from industry, local government, training providers, and related agencies in the region. These estimates do not include the workers required to fill existing vacancies. With high vacancies across the region, the number of total workers demanded by industry will be higher.

The outlook for industries in the Wimmera Southern Mallee is positive, but the region's economic potential depends on the availability of labour. Employers across all industries currently face challenges filling all types and levels of roles. This shortage is projected to continue, with data and taskforce estimates suggesting that the region will have a shortfall of 700 to 2,800 workers in the next 3 years.

Table 1 | Estimated new job demand outlook for 2022–25 by industry¹

Industry	Estimated current workers 2022 ⁷	Taskforce adjusted forecast new jobs (CAGR) ⁸	New workers to fill new jobs ⁴	New workers to fill retirements ⁹	Total workers needed
Agriculture	4,450	0 to 0.5%	0 to 60	230	230 to 290
Food product manufacturing	969	8 to 10%	240 to 310	50	300 to 360
Construction	1,300	3 to 3.5%	150 to 180	80	230 to 260
Health care and community services	4,550	3 to 4%	420 to 640	190	610 to 820
Mineral sands mining	250	20 to 25%	160 to 200	10	170 to 210
Visitor economy	3,050	3 to 5%	380 to 640	190	560 to 830
Other	7,781	N/A	400	470	830
TOTAL	22,350	4 to 4.5%	1,700 to 2,400	1,210	2,910 to 3,600

¹ This profile defines the health care and community services industry as the Health Care and Social Assistance ANZSIC industry and the visitor economy industry as the Retail Trade, Arts and Recreation Services and Accommodation and Food Services ANZSIC industries



Key challenges and opportunities

While the focus of this profile is on the training and skills response for the Wimmera Southern Mallee, a skilling response alone will not be sufficient to meet the region's workforce supply challenges. A holistic approach is required to secure the right workforce and ensure economic prosperity.

Economic growth is contingent on multiple enablers, including but not limited to the availability of labour, affordable housing, supply chains and accessible child care. There is considerable risk that the growth potential across all industries in the region will fail to be realised if significant workforce shortages are not addressed and if demand for new workers (above and beyond current vacancies and anticipated retirements) cannot be met.

The education and training system has an important role to play to support the Wimmera Southern Mallee economy. Recognising that the region has a tight labour market, and a projected labour supply shortage, universal skills and training levers should aim to maximise attraction and retention across all critical industries and improve the relevance of training as a whole. This necessitates a highly flexible, cross-industry approach to training and upskilling the workforce, and the recognition of experience and transferable skill sets to support ease of moving from one job (or career) to another.

Success, in large part, rests on the flexibility of education and training delivery to meet the local needs of learners, industries and employers in the Wimmera Southern Mallee.

Next steps to address regional skills and workforce needs

Six priorities have been identified for the education and training system:

- develop and improve visibility of cross-industry career pathways
- target recruitment and support activity to cohorts underrepresented in particular industries
- incentivise trainers to gain accreditation and enter the education system
- expand local or nearby training provision
- ensure TAFE, university, Adult, Community and Further Education (ACFE) Learn Locals and Registered Training Organisation (RTO) training is relevant to industry needs
- develop a trade-based, foundational 'job' for the region.

Collaboration between industry, education and training providers and government will collectively play an essential role to ensure the region's unique training needs are understood and supported.

Each industry also has unique skills and training needs. Opportunities unique to each key industry group are discussed in detail in the skills demand profiles by industry.

Acknowledgements

Acknowledgement of Country

The Victorian Skills Authority (VSA) acknowledges and recognises the Traditional Owners of the land within the regional area, of the Wotjobaluk People, being the Jaadwa, Jadawadjali, Wergaia and the Jupagalk alongside the Dja Dja Wurung People, while also including areas without formally recognised Traditional Owners. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.

Acknowledgement of support to undertake this work

The Regional Skills Demand Profiles have been prepared with support from Regional Development Victoria. The profiles are a valuable resource for regional Victoria, the Department of Jobs, Skills, Industry and Regions, the Department of Education and broader government. The VSA will work closely with stakeholders to address the opportunities and issues identified in the profiles.

Acknowledgement of Regional Skills Taskforce members

The VSA acknowledges the time, contribution and insights of the taskforce (table 2) and additional representatives from industry, local government, education and training institutions and related agencies. The findings in this Profile would not be possible without their openness, generosity, expertise and commitment to the regional economy and community.

Table 2 | Regional Skills Taskforce members

Member	
Cathy Tischler	Wimmera Southern Mallee Regional Partnership
Chris Sounness	Wimmera Development Association
Christine Brown	Federation University
Darren Webster	Skillinvest
Emma Vogel	SPS Consulting
Josh Koenig	Uniting Wimmera
Kate Pryde	Grampians Health
Kendra Clegg	Bushfire Recovery Victoria
Marc Sleeman	Grampians Tourism
Mark Williams	GWM Water
Tim Hopper	CHS Group
Wayne Street	Street Ryan and Associates

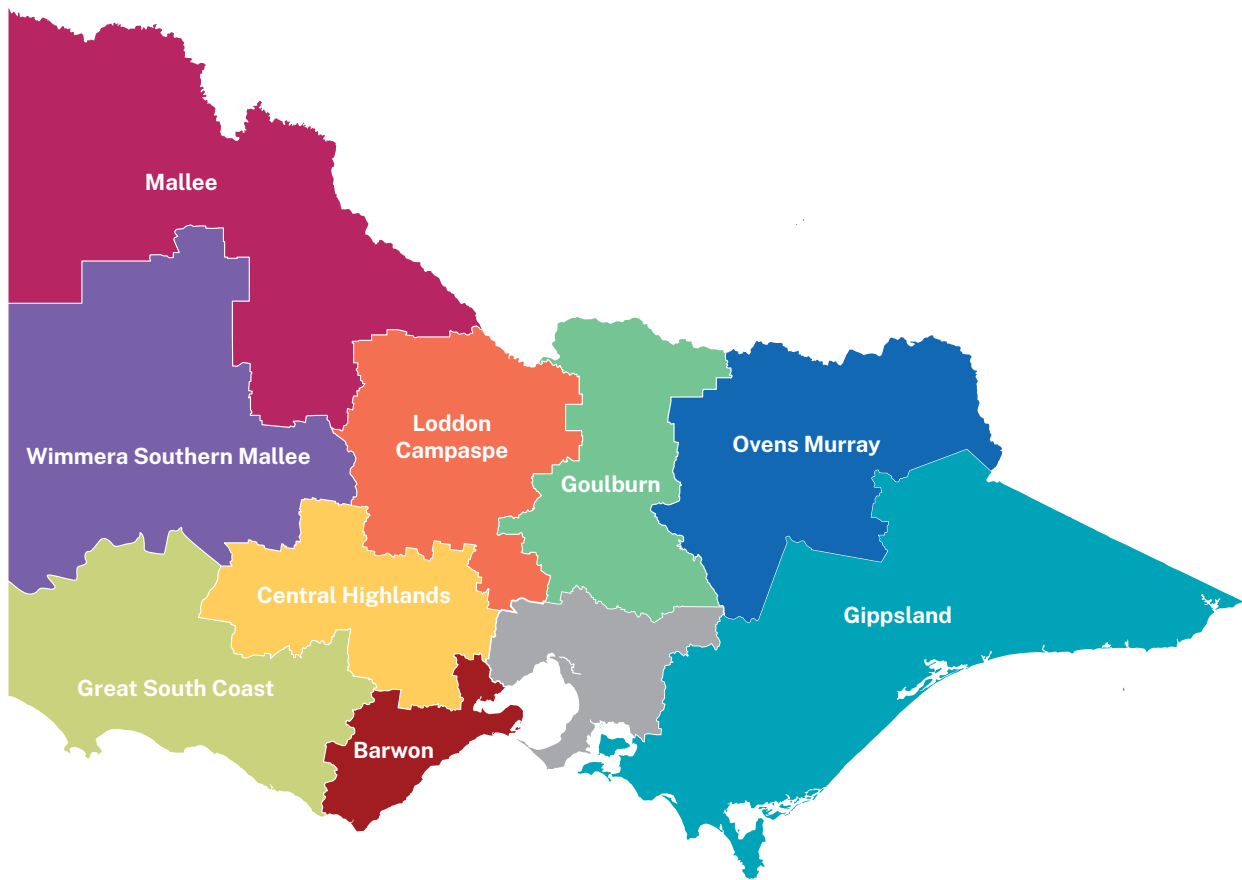


Introduction

The Victorian Skills Authority has a critical role to play in understanding and communicating the skills needed to ensure Victoria can meet current, emerging and future skills and industry demands that enable inclusive growth and prosperity for all Victorians.

Regional Victoria is critical to a thriving Victoria, and the Regional Skills Demand Profiles are an important element of setting the regions up for success.

Figure 3: Victorian Regional Partnerships map



The purpose of Regional Skills Demand Profiles is to provide a robust evidence base that draws on a wide range of data and information that is supplemented by the valuable insights and experience of key stakeholders, brought together through dedicated Regional Skills Taskforces and industry roundtables.

The Regional Skills Demand Profiles are developed through a collaborative and robust process, with a focus on providing local insights and a tailored and actionable response to support decision-makers to understand broad workforce trends, challenges and opportunities. This profile has been established with the intention of being accessible, practical and valuable to a range of stakeholders, including government departments and agencies, employers, training providers, local industry and the region.

This profile focuses on the 3-year outlook for the Wimmera Southern Mallee region, and the education and training opportunities that can assist in developing the required workforce. Whilst the profile acknowledges that many factors contribute to economic development, this work is centred on the skills and training responses (to engage, train and retain the workforce) rather than other levers that are also essential to secure labour and ensure the region's prosperity.

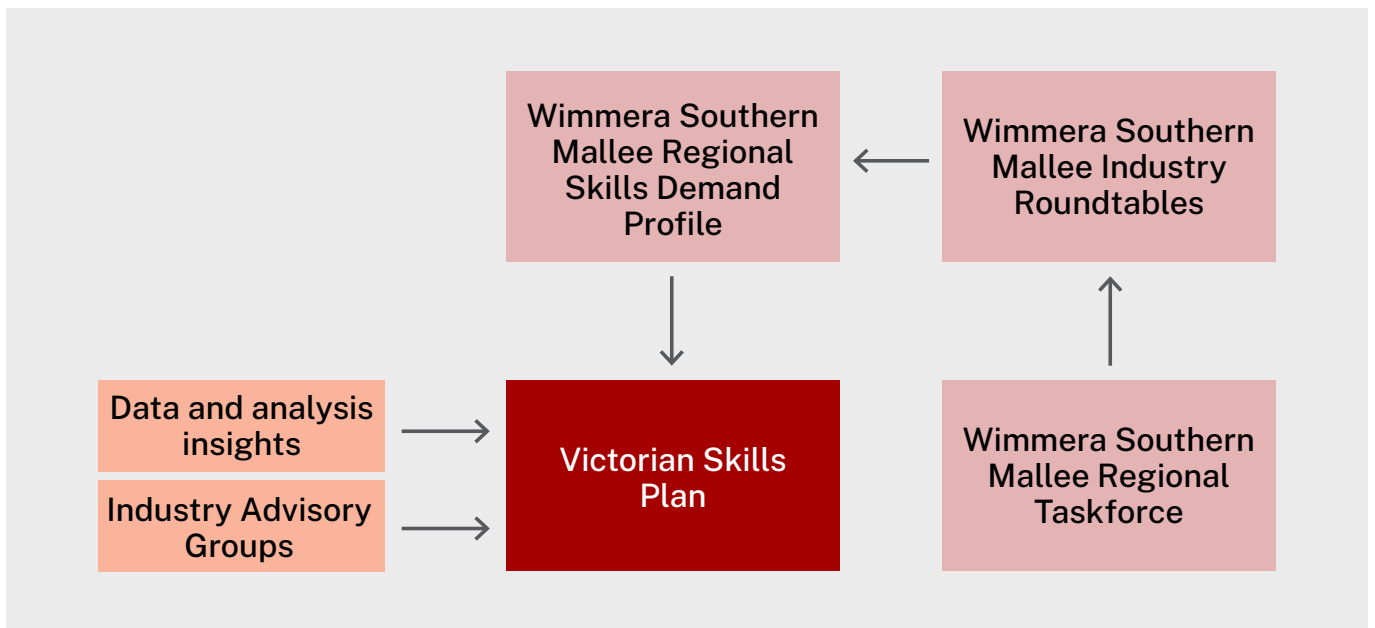
Connection to the Victorian Skills Plan

The Victorian Skills Plan defines current and emerging skills needs and labour market shortages across the state at both industry and local levels to direct and enable more targeted investment that ensures a Victorian skills system which can meet the current, emerging and future demands of industry and the community.

As the first of many, the inaugural plan, alongside the development of the Regional Skills Demand Profiles, highlights the need for an ongoing conversation and collaboration across the sector to address current and emerging skills requirements. While the plan covers the current landscape of the Wimmera Southern Mallee region and industry needs, the profile focuses more deeply on the localised challenges and opportunities for the Wimmera Southern Mallee region.

The plan will be continually refined, building on data and insights year on year, with a clear focus on driving better collaboration and innovation across the state and in each of Victoria's regions.

Figure 4: Connection between the Regional Skills Demand Profile and the Victorian Skills Plan



The data used in this profile is based on the latest available information at the time of its development. Updated data and insights can be accessed via the Victorian Skills Authority website where appropriate or through various data sources, as referenced throughout the profile.



Strategic context

The Victorian Government is committed to tackling the challenges facing the state, through investment, planning and delivery of strategic initiatives that have a positive and sustainable impact on Victorian regions.

The Skills for Growing Victoria's Economy Review by Jenny Macklin (the Macklin Review) and the Review into Vocational and Applied Learning Pathways in Senior Secondary Schooling by John Firth (the Firth Review) highlight the need for sector reforms and transformation to ensure a future-proof skills system that can deliver the skills of the future.

In line with key recommendations from the Macklin Review, Victorian Government is prioritising improvements to Victoria's skills system to ensure the sector can continue to innovate and meet the changing needs of students and industry in creative and collaborative ways.¹⁰

Committed to skill-led economic recovery for the state, the government's skills reform agenda seeks to transform the delivery of senior secondary education and vocational education and training.

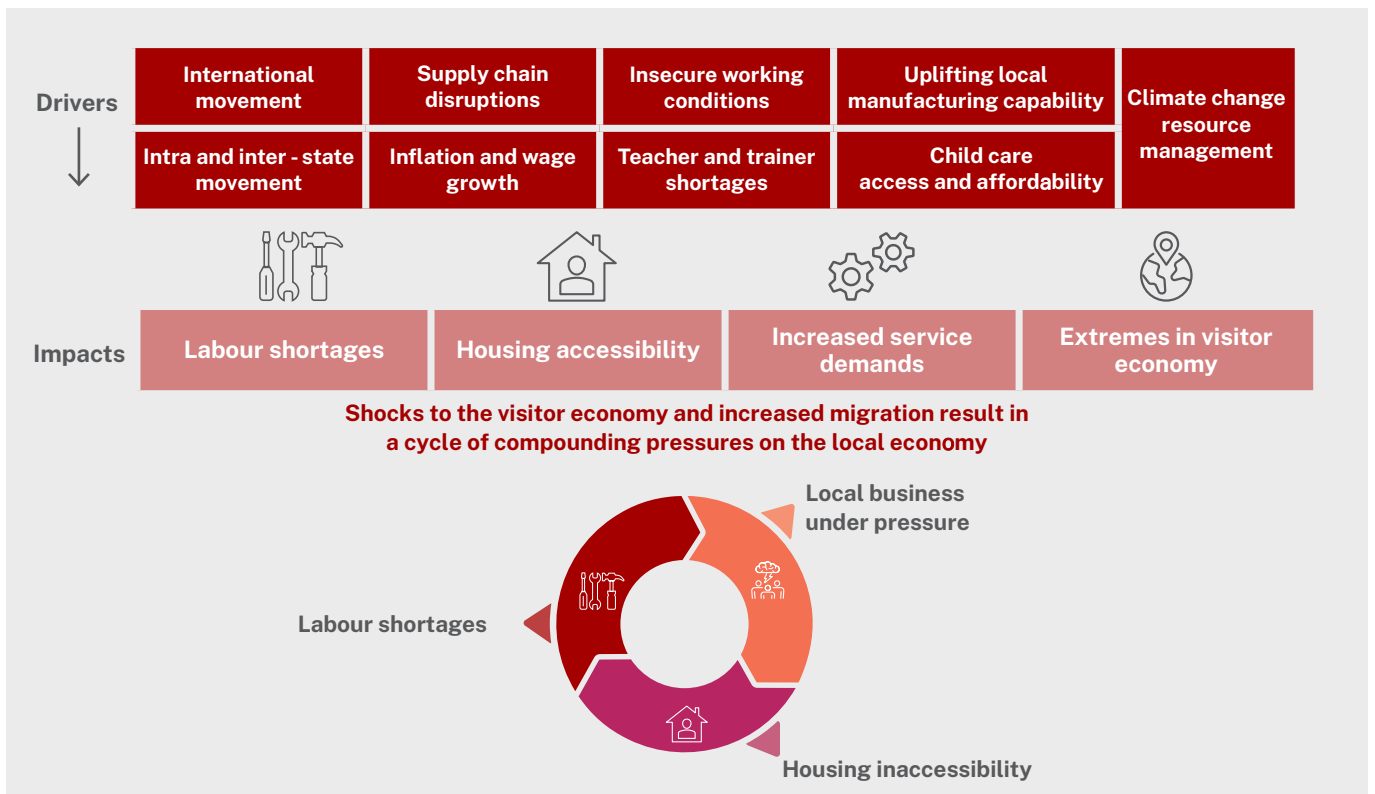
This agenda will ensure Victorians have access to high quality education and training that supports the attainment of meaningful jobs and careers, while simultaneously increasing access to a skilled workforce for industry and employers, supporting the social and economic prosperity of individuals and the community.

State-wide trends and the impact on the Wimmera Southern Mallee Region

This profile is being prepared in a complex and challenging period that goes beyond the skills system and skills policy. The Australian and Victorian economies are being impacted by cost of living pressures, significant labour shortages and the continued recovery from the pandemic that has exacerbated many underlying challenges.

These conditions are recognised as megatrends as they are present across diverse sectors and contexts. Certain megatrends present unsustainable pressure for businesses and residents, globally, within Victoria and in a localised context unique to Wimmera Southern Mallee.

Figure 5: Megatrends impacting the Victorian economy



Education and training system enables regional economic growth

The Wimmera Southern Mallee Region contributes considerably to Victoria's economy and has the potential to extend its influence and impact through growth in a number of areas. However, to realise opportunities for further growth, the region will need a significant increase in the supply of workers, including those who possess the right skills for industry. The training and skill system is one lever that can help with the attraction, retention and upskilling of the workforce for the Wimmera Southern Mallee.

A vibrant and prosperous Victoria relies on a skilled workforce. Jobs are created, and businesses grow, when Victorians learn new skills and apply these skills in the workplace. The ability for workers to develop and apply new skills is critical so they can survive and thrive in the labour force. The education and training system has a fundamental role to play in enabling workers to develop these skills and in regional areas it is a critical enabler of economic development and growth. In regional areas, access to a high quality education and training system also plays a key role in helping form social connections and networks that can help retain young people in the region.

The education and training system needs to respond to industry needs but also account for the perspectives and needs of providers and learners. The system can contribute to ensuring that Victoria has an appropriately skilled workforce by including policy, funding and system levers, evidence informed planning and problem solving, and collaboration across the vocational education and training (VET) and post-secondary education system.

Supporting a localised training and skills response

This Wimmera Southern Mallee Regional Skills Demand Profile provides a localised view of the region and its economy, the workforce outlook and the skills needs for the region. The profile is co-developed and owned by the region, which is represented by a taskforce comprised of industry leaders and education and training providers from across the region. The taskforce provides a credible and representative voice for the region, to ensure that the government funded training system can better serve the unique needs of the local economy and communities. The taskforce has ownership of this profile and an ongoing remit to ensure that the region's education and training requirements are understood and supported.

This profile focuses on the 3-year outlook for the Wimmera Southern Mallee, and the education and training opportunities that can help to develop the workforce required for the region. While the profile acknowledges that many factors contribute to economic development, this work is centred on the skills and training responses (to retain, upskill, reskill and train the right workforce) rather than other levers that are also essential to secure labour and ensure the region's prosperity.

Opportunities for population growth

The Wimmera Southern Mallee region had an estimated population of 48,400 people in 2021, with about 40% of this population residing in Horsham as the regional centre.⁵ While the region's population declined slightly over the last decade, it was broadly stable in 2019–2020, with positive net international migration countering a minor loss of residents to other domestic regions.

Future population growth may deviate from the trend of decline seen in the last decade. Taskforce members reported a flow of people entering the region in pursuit of a regional lifestyle after the pandemic. Recent population data supports this possible trend change, with the Wimmera Southern Mallee region slightly outperforming Victoria (population decline of 0.6% in the region compared to 0.7% across the state from 2020 to 2021).¹¹ Housing demand is another indicator of recent growth, with the number of building approvals increasing by 29% and house prices increasing by 38% per annum, over the last 2 years.¹²

Future population growth is expected to vary between Local Government Areas (LGAs). Pre-pandemic estimates show population growth to be focused on the regional centre of Horsham, with minor declines in other areas.¹³ Post-pandemic estimates also indicate that population growth is likely to be centred on Horsham and Hindmarsh areas.⁹

Ageing workforce and youth migration reflect labour supply challenges

The region is home to an ageing population. Employers in the region reported high youth out-ward migration, with many young people leaving the region to pursue education and work opportunities in metropolitan Melbourne and elsewhere in Regional Victoria, before often returning after the age of 35. This tendency for younger workers to leave the region for education and employment has been noted as decreasing in the last 2 years due to the pandemic. A continuation of this trend would contribute to population growth in the region.



The ageing population is reflected in the region's workforce. Around 1,200 workers are expected to retire in the next 3 years, equivalent to approximately 5% of the region's workforce. A workforce exit of this magnitude will likely contribute to existing labour supply challenges in the region. Industries with a very high proportion of ageing workers are particularly vulnerable to this challenge, including the agriculture industry, where almost a third of workers are over 65 (noting that the retirement age for workers in the agriculture industry tends to be higher than average). Large-scale retirements could result in a large shift in workforce composition, and potentially contribute to the loss of knowledge and experience within some industries and businesses.

Consultation-driven approach captures regional reality

This profile was developed through consultation, research, and qualitative and quantitative data analysis of the region's economy, population, workforce, and training environment. Consultation involved the taskforce and representatives from key industries, as well as education providers within the region. The profile distills insights that were gathered as part of this process to:

- describe the regional outlook, considering industry trends and key drivers of demand
- detail the occupation and skilling implications of the region based on forecasting
- describe the state of the labour market in the region, and availability of labour to meet demand
- provide an evidence base for appropriate education and training response to these challenges.

Long-term approach to regional training and skills response

The insights and opportunities identified within this profile provide a starting point for industry, education and training providers and government to deliver the skills and training pathways required to meet current and future economic demand. The onus remains on all stakeholders to sustain collaboration, so that students and workers in the Wimmera Southern Mallee have access to training opportunities that are efficient, equitable, and aligned to employment outcomes.

In addition, the taskforce, and relevant areas of government, can use this profile to progress action in relation to broader workforce challenges that cannot be addressed through the training and skill system.



Key industries across Wimmera Southern Mallee

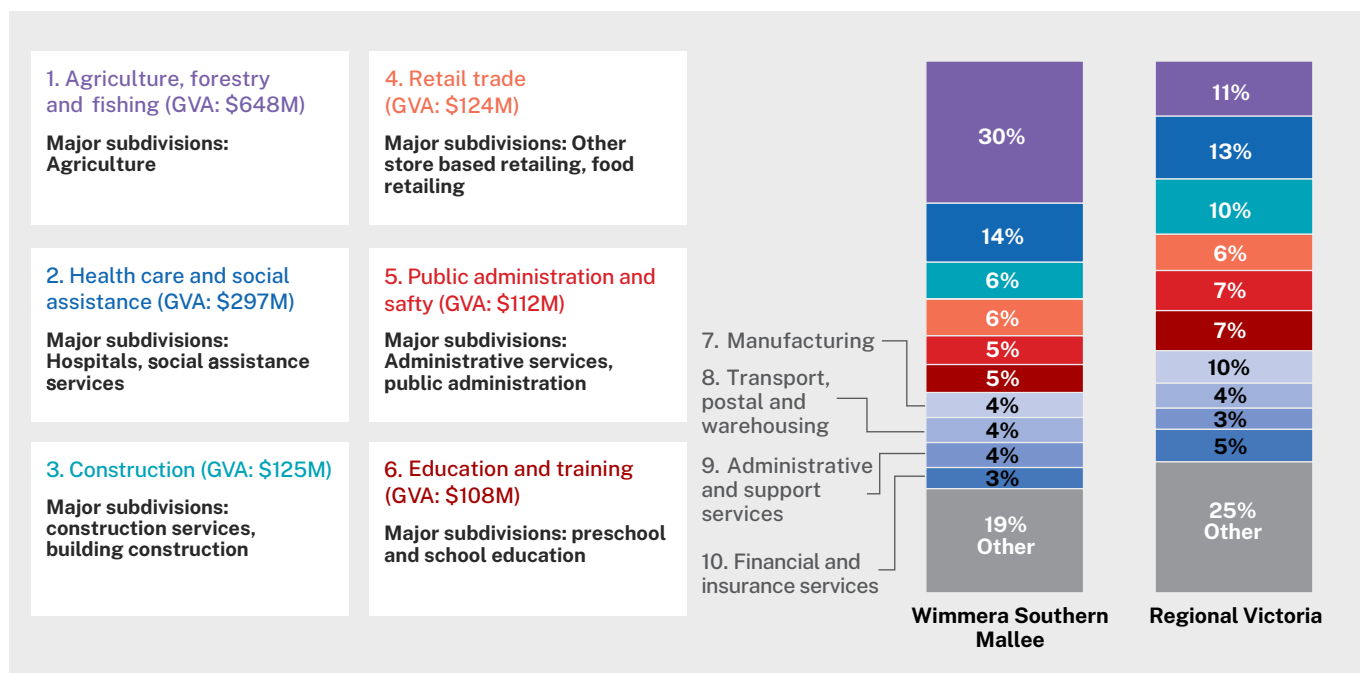
This profile focuses on 6 industries for in-depth analysis of the economic and workforce outlook in the next 3 years, acknowledging that the region is comprised of many more important and connected industries. The 6 industries have been selected primarily because of their economic contribution to the region, and the critical dependence they have on securing the right workforce. Not all are among the top employing or largest gross value added (GVA) industries, but were identified by taskforce members as ones with potential growth opportunities for the region. The industry profiles provide a snapshot of each industry’s outlook, job requirements, challenges, and opportunities. The industries discussed in more detail are:

- agriculture
- food product manufacturing
- construction
- health care and community services
- mineral sands mining
- visitor economy, including the accommodation and food services, arts and recreation services, and retail trade industries.

The region’s economy comprises interconnected industries

The Wimmera Southern Mallee’s economy is diverse, with a range of industries contributing to the region’s economic prosperity and employment prospects. Figure 6 outlines the largest industries in the region by GVA and Figure 7 illustrates how these industries contribute to the region’s economy.

Figure 6 | Industry² gross value added (GVA), 2021¹⁴



² This profile defines the ‘health care and community services’ industry as the Health and Social Assistance ANSZIC industry code and the ‘visitor economy’ industry as the Retail Trade, Arts and Recreation Services and Accommodation and Food Services ANSZIC industry codes



Agriculture

The region is historically built around a strong agriculture industry, which makes the greatest contribution to GVA at 30% and plays a disproportionately large role in the economy, when compared with other parts of regional Victoria. The agriculture industry utilises the region's natural assets to support large-scale cropping of grains, cereals, oilseeds, and mixed-farming systems,⁷ including wool, sheep meat, pig, and poultry production. The industry is also supported by the region's road and freight rail network, world-class research and development capabilities at Horsham's Grains Innovation Park with recent investment of \$12 million to support innovation, technological and advanced manufacturing capability,¹⁵ and a strong agriculture training presence through Longerenong College.⁴

Food product manufacturing

Food product manufacturing builds on the region's agricultural strengths. Local producers benefit from a close link with the agriculture and broader agribusiness industries, and mostly focus on grain mills, cereal products, and meat processing.⁴ The food product manufacturing industry is also a significant contributor to regional GVA, and accounts for over 80% of the region's total manufacturing exports.⁴ Established manufacturers in the region include meat processors Frews, Luv-a-duck and Otway Pork, and plant-based protein producer Australian Plant Proteins. The industry also includes a range of small-scale artisanal producers, who produce goods such as boutique olive oil and specialty baked products.¹⁶

Mineral sands mining

The region is home to 75% of Victoria's mineral sand deposits, concentrated in the western and northern areas.⁴ Businesses and entities in the region have not previously extracted mineral sands, but are actively exploring opportunities to produce rare earth metals in high demand for use in global clean energy technology.¹⁷ Mine construction and operation has the potential to drive significant economic activity in the region.

Visitor economy

Nature-based and Aboriginal cultural assets, such as the Grampians National Park and the Brambuk Cultural Centre, contribute to the region's visitor economy.⁴ The region's Silo Art Trail is Australia's largest outdoor gallery and is expected to draw thousands of tourists to the region.¹⁸ Significant water assets, including Wimmera River, Lake Fyans and Lake Wallace,¹⁹ and art facilities including Horsham Regional Art Gallery also support recreational activity. These assets attract visitors to the region, with tourist spend extending to local accommodation, food, beverage, and recreation services. Pandemic restrictions on international, inter-state and intra-state travel have hindered visitation over the last 2 years, however, businesses reported signs of recovery.

Construction

The region's economic activity is also contingent on a strong residential construction industry to supply housing for local people, enable workforce attraction, and to support accommodation for tourists. Residential construction activity has grown considerably in the last 2 years, with the number of residential building approvals increasing by 29% per annum,¹² however, housing and accommodation inaccessibility has been identified as a key barrier to further growth in the region.²⁰ A recently announced investment of \$15 million to support the construction of social housing in the region will address some, but not all, of the current housing demand.²¹ The agriculture, tourism, utilities and clean energy industries also drive demand for civil and commercial construction in the region, such as demand for agriculture storage facilities, clean energy infrastructure associated with the Western Victoria transmission upgrade, Bulgana Green Power Hub and Murra Warra wind farm, and visitor economy infrastructure.

Health care and community services

Health care and community services are provided across the region. Demand is driven by the region's population dynamics, including an ageing population,²² relative socio-economic disadvantage in some LGAs²³ and relatively high rates of drug and alcohol treatment demand.^{24,25} Health services are primarily delivered by a range of small and large organisations including hospitals, clinics and non-for-profit and for-profit organisations, including Grampians Health, Grampians Community Health and Goolum Goolum. The industry is a critical enabler for workforce participation in other industries, with child care inaccessibility identified as a barrier to workforce participation, particularly for female workers.

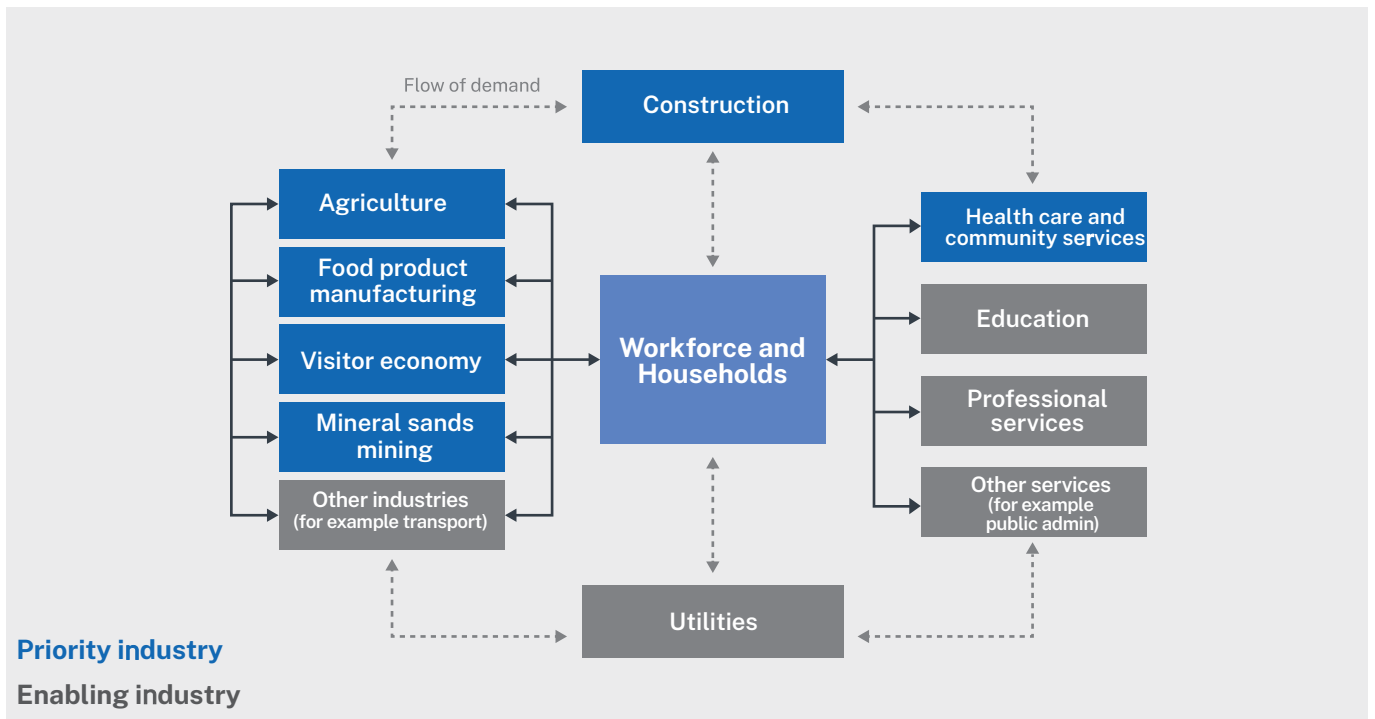
Other supporting industries

The key industries in the region are supported by a range of wrap-around industries. Agriculture and food product manufacturing production creates an active transport and logistics industry, with the region's location and existing road and rail infrastructure facilitating the movement of goods between industries and locations. The region's primary, secondary and tertiary education system makes a substantial contribution to the social fabric of the region and supports the development of the local workforce. The public administration industry, including federal, state and local government agencies, police and justice services, and emergency management services connect industry, government and people to improve social and economic outcomes in the region.

The utilities industry provides water, power and communication to industries and households. Professional services including engineering, finance and management provide essential support to the region's key industries, with engineering set to play an important role in capturing the opportunities associated with clean energy production and mineral sands mining. Professional finance and management services also support business transformation, and vertical integration in agriculture and food product manufacturing.

Figure 7 shows the interconnectedness of the Wimmera Southern Mallee's industries.

Figure 7 | The Wimmera Southern Mallee's interconnected economy





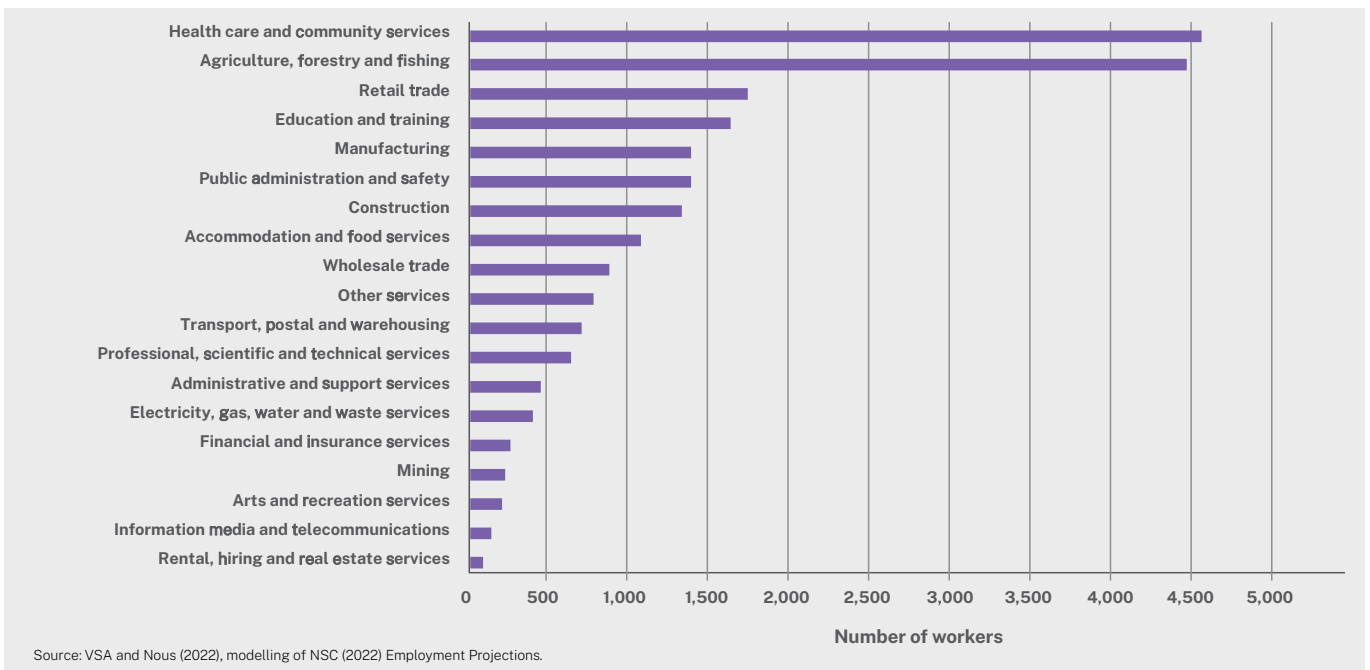
Workforce location across Wimmera Southern Mallee

Approximately 22,350 people are employed in the region.⁷ Given employers from multiple industries reported significant labour shortages, the actual number of jobs could be higher. Health care and community services is the largest employing industry, accounting for 20.4% of the total jobs, closely followed by agriculture which is at 19.9%. The broader visitor economy industry, which comprises the retail trade, accommodation and food services and arts and recreation industries, collectively represents nearly 14% of the region's workforce. Other large employing industries include construction (5.8%) and education and training (7.4%).

Horsham is home to the largest workforce in the region, which supports large concentrations of health care and community services, visitor economy and construction operations. The Yarriambiack, Hindmarsh, and West Wimmera areas have a notably larger proportion of their workforce employed by agriculture, due to the relatively larger presence of cropping and livestock operations.

Consistent with state-wide trends, most businesses (98%) are non-employing or have less than 20 employees, and the majority of businesses (51%) have a turnover of less than \$200,000 per annum.²⁶ Around 60% of businesses are non-employing, which may reflect a high number of self or family-run businesses. There are some larger businesses in the region, with 12 employers reporting having more than 200 workers.²⁷

Figure 8 | Industry* of employment, 2022 ¹⁴



The region's labour market is tight

Approximately 22,350 people were employed in the Wimmera Southern Mallee in 2022 and the region's tight labour market creates substantial workforce shortages. The region does not have a large pool of available workers, with unemployment at a historical low of 2.7%²⁷ and participation levels above the state average for most age groups.²³ However, the region reports low female workforce participation in the 35 to 54 year old age group,²³ with inaccessibility of childcare cited as a critical driver of this lower participation rate. Child care attraction and retention is further inhibited by a lack of available and affordable housing, compounded by current delays and cost blow-out in construction supply chains. Workforce shortages inhibit the operations of local businesses and create competition for workers between industries and businesses.

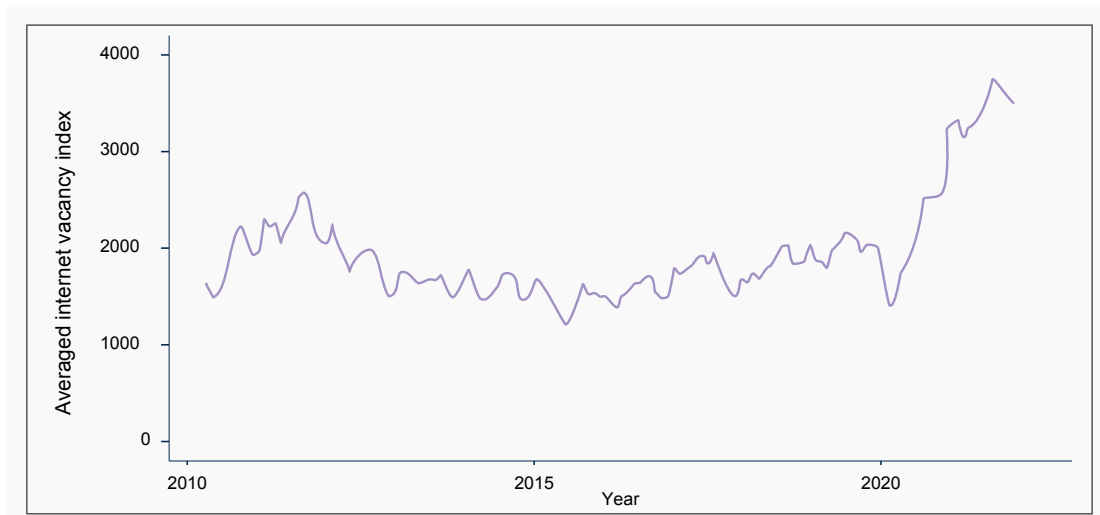
The region has experienced a rapid increase in demand for workers in the last 2 years, driven by industry growth and constrained labour supply. Figure 9 shows the region's increase in employers seeking new employees, with online job advertisements increasing 70% above pre-pandemic levels. In the last year, job ads online grew by 52% between February 2021 and February 2022. Employers across all priority industries reported extensive workforce shortages and expressed the urgent need to take on new workers to fill existing vacancies. The labour shortage has created increased competition for workers, with workforce poaching reported in the agriculture, visitor economy, mining and construction workforces. Employers also noted that roles in critical occupations must be filled to enable industries to meet current demand, let alone expand further.

The region has relatively high levels of labour force participation, with most age groups reporting above average participation in September 2021.²³ However, the participation rate for the 35 to 44-year-old group was significantly lower than the state-wide and regional Victoria averages.²³ Female labour force participation is also considerably lower than the state average in the 35 to 54-year-old age group.²³ This discrepancy is likely in part caused by structural barriers to workforce participation, such as a lack of available and affordable child care across the region.²⁸

Continued demand for workers in Wimmera Southern Mallee

The region has very low unemployment, with a smoothed unemployment rate of 2.7% for December 2021, compared with the state average of 4.2%.²³ The labour market is likely to have tightened since this point in time, with Victoria's unemployment rate dropping to 3.7% in August 2022.²⁹ The region's youth unemployment rate also experiences significant seasonal fluctuations, approaching zero over summer and rising above 10% during winter.²³ This is likely caused by the need for additional farmhands during harvest season and an increase in tourism during school holidays. Low unemployment coupled with the high participation rates, an ageing workforce, and historically slow population growth underpins the labour supply challenges for the region.

Figure 9 | Internet vacancy index of the Wimmera and Western region, 2010 to March 2022³⁰



Key opportunities for the region

The Wimmera Southern Mallee is poised for economic growth across key industries in the next 3 years. However, economic growth is contingent on multiple enablers, including but not limited to the availability of skilled workers, affordable housing, supply chains, and accessible child care.

Growth in economic output affects workforces differently between industries, due to differences in technological advancements, skill requirements and economies of scale. The focus of this Profile is to articulate the anticipated change (if any) in workforce growth, cognisant of the various drivers of that change.






There is considerable risk that the growth potential across all industries in the region will fail to be realised if significant workforce shortages are not addressed and if demand for new workers (above and beyond current vacancies) cannot be met.

Statewide and region-specific trends will fuel workforce growth

The Wimmera Southern Mallee's workforce outlook is influenced by state and national trends including increased government services and infrastructure investment, changed migration patterns post-pandemic, an ageing population and an increased adoption of technology. Regional priorities, based on the region's natural strengths in agriculture, food product manufacturing and mining, further underpin and shape changing workforce requirements.

Drivers for workforce change in the Wimmera Southern Mallee are shown in Table 3 with further detail below

Table 3 | Drivers of workforce outlook

<p>POLICY</p>	 <p>Very High</p>	<ul style="list-style-type: none"> Major government reforms across health care and community services will increase the number of workers required to deliver services, including family violence, early childhood, mental health, disability and aged care reforms. Investments in housing, transport, agriculture, manufacturing and tourism infrastructure <p>Strongly affecting: Agriculture, health care and community services, education, construction, visitor economy</p>
<p>ECONOMIC</p>	 <p>Medium</p>	<ul style="list-style-type: none"> Record pricing and high export demand for commodities Demand for locally produced high value food products Consolidation of business to increase profitability <p>Strongly affecting: Agriculture, food product manufacturing, visitor economy, construction</p>
<p>SOCIAL</p>	 <p>High</p>	<ul style="list-style-type: none"> Ageing population Relatively high rates of underlying health conditions, chronic disease and drug and alcohol use. Increasing inaccessibility and unaffordability of housing and child care Population movement from metropolitan areas to the region Growth of tourism in the region Strong community interest to see the region develop <p>Strongly affecting: Health care and community services, visitor economy, construction</p>
<p>TECHNOLOGICAL</p>	 <p>High</p>	<ul style="list-style-type: none"> Increase in technology-driven production, automation and 'Internet of Things' Investment in the construction of clean energy assets, such as solar and wind farms <p>Strongly affecting: Agriculture, food product manufacturing, mineral sands mining, construction</p>
<p>ENVIRONMENTAL</p>	 <p>High</p>	<ul style="list-style-type: none"> Highly variable and increasingly challenging climate conditions, including rainfall Availability of natural resources Natural amenity of the region <p>Strongly affecting: Agriculture, food product manufacturing, mineral sands mining, visitor economy</p>

Agriculture and food product manufacturing positioned for growth

The Wimmera Southern Mallee's strong agricultural presence creates opportunity for growth. Advancement in technologies such as agricultural robotisation, automation and data-informed decision making are pushing agricultural businesses to become increasingly efficient. This trend results in demand for higher skilled workers that can work alongside advanced technology.

The agricultural base also creates opportunity for the food product manufacturing industry to capture market demand for locally produced, artisanal products, in addition to commoditised food products. The industry also has opportunity to leverage connections to the broader agribusiness industry to combine multiple production phases to create 'paddock to plate' products to satisfy consumer demand.

Natural assets create demand for visitor economy, mining and clean energy

The region's nature-based tourism experiences, including the Grampians Peak Trail and the Silo Art Trail are set to attract visitors to the region, creating demand for retail trade, accommodation and food services. However, while visitor economy businesses reported strong domestic tourism levels, challenges in filling entry-level roles may disrupt the visitor experience and dampen this demand.

Natural endowments present opportunity for growth in the mining industry, with several projects to extract the region's mineral sands deposits poised to begin construction in the next 3 years. The construction of the Bulgana Green Power Hub and Murra Warra wind farm also demonstrate the potential for the region to benefit from the region's natural resources through the production of clean energy. These industries hold the potential for long-term, large-scale growth as demand for rare earth minerals and clean energy production continues, but are dependent on a large-scale workforce, likely with a different or augmented skill mix. Analysis and planning to understand the longer-term workforce requirements are required to ensure an adequately skilled and available workforce exists to meet demand for clean energy and mineral sands production.

Workforce growth creates demand for health care and construction

Population movement from metropolitan areas to the region, job creation in the region and government investment has created substantial demand for residential construction that is likely to continue. Residential construction is a critical enabler of growth in other industries, supplying housing for the region's workforce. An ageing population, government investment to increase service provision and the potential for population growth is also set to drive demand for health care and community services. The ability of the health and community services and construction industries to meet this demand is dependent on the industries overcoming extensive labour shortages in critical occupations.

Demand for new workers over the next 3 years

Table 4 shows the region's key industries that will require new workers to fill new jobs over the next 3 years. These estimates are informed by data-based projections and advice provided by the taskforce.

Demand for new workers is forecast to be spread across industries, with the taskforce estimating workforce growth in all 6 key industries. The visitor economy and health care and community services industries are expected to experience high workforce demand, with health care and community services remaining the largest employing industry in the region. The taskforce adjusted estimates for the food product manufacturing and mineral sands mining industries noticeably exceed the data estimates. These adjustments are based on intelligence about planned investment by food product manufacturers and likelihood of rapid upscale in operation for several mineral sands mining businesses.



Table 4 | Estimated new job demand outlook by industry

Industry	Estimated current workers 2022 ⁷	VSA forecast new jobs 2022–25 (CAGR) ⁸	Taskforce adjusted forecast new jobs 2022–25 (CAGR) ⁹	New workers to fill new jobs
Agriculture**	4,450	-0.5%	0 to 0.5%	0 to 60
Food product manufacturing	969	0.5%	8 to 10%	240 to 310
Construction	1,300	2%	3 to 3.5%	150 to 180
Health care community services	4,550	3%	3 to 4%	420 to 640
Mineral sands mining	250	1%	20 to 25%	160 to 200
Visitor economy	3,050	3%	3 to 5%	380 to 640
Other	7,781	1.5%	N/A	400
TOTAL	22,350	1.5%	4 to 4.5%	1,700 to 2,400

*All numbers are rounded

** The agriculture industry requires an additional 300 seasonal workers during the harvest period each year.

Table 5 provides an indicative estimate of overall workforce demand across key industries in the region, based on data analysis and taskforce estimates. Workforce demand comprises the new jobs estimates outlined in Table 4 above and workers required to replace retirees who exit the workforce. These estimates do not include the workers required to fill existing vacancies, and the number of total workers demanded by industry will be higher once these vacancies are included.

Businesses will seek an additional 1,700 to 2,400 workers to meet demand, and a further 1,210 workers to replace retirements. Retirements are estimated to be particularly acute for health care and community services, visitor economy and agriculture. The agriculture industry is estimated to also require an additional 300 seasonal workers during the harvest season.

Table 5 | Estimated workforce outlook by industry

Industry	Estimated current workers 2022 ⁷	New workers to fill new jobs ⁸	New workers to fill retirements ⁹	Total new workers needed
Agriculture	4,450	0 to 60	230	230 to 290
Food product manufacturing	969	240 to 310	50	300 to 360
Construction	1,300	150 to 180	80	230 to 260
Health care and community services	4,550	420 to 640	190	610 to 820
Mineral sands mining	250	160 to 200	10	170 to 210
Visitor economy	3,050	380 to 640	190	560 to 830
Other	7,781	400	470	830
TOTAL	22,350	1,700 to 2,400	1,210	2,910 to 3,600

*All numbers are rounded.

Key challenges facing the region

Labour supply is inadequate to meet growth in workforce demand

As described in the previous sections, the Wimmera Southern Mallee’s key industries have much potential to grow, but this growth is highly dependent on an adequate labour supply. Employers across all industries currently face significant challenges filling all types and levels of roles and anticipate this problem will worsen. Employers reported difficulty filling entry-level roles such as farm workers, food processing workers and front of house visitor economy staff, as well as experienced and high-value roles including electricians, family violence practitioners, chefs and engineers. In the final section of this Profile, the industry demand profiles further explore industry-specific workforce challenges.

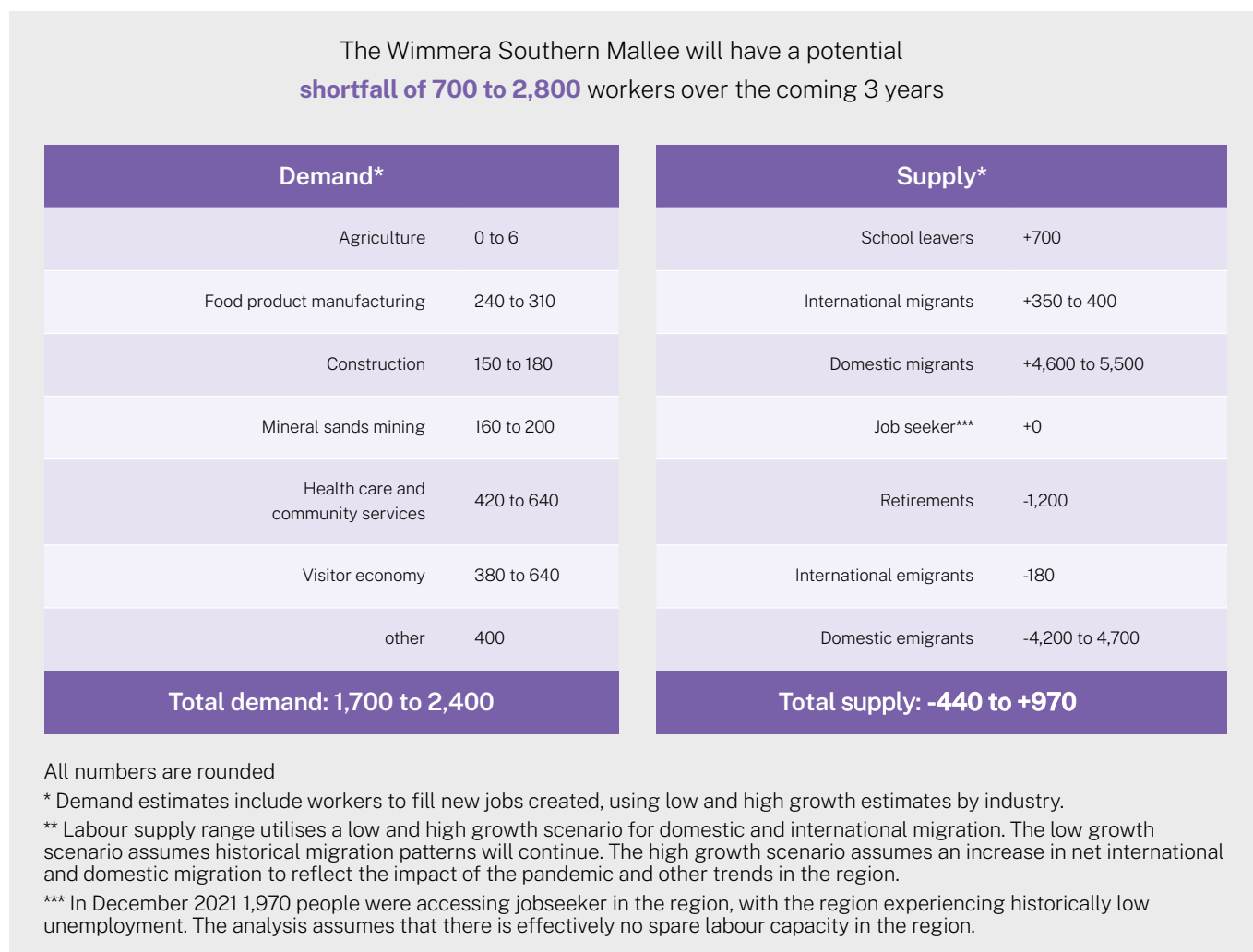
Labour demand exceeds and will continue to outstrip supply in the next 3 years

Data and taskforce estimates suggest that the current labour shortage is likely to continue. Approximately 5,590 to 6,060 people are estimated to leave the workforce in the next 3 years, due to retirement and emigration, with 5,620 to 6,560 people expected to enter the workforce in the same period.

This workforce supply growth is insufficient to meet the workforce demand estimates. Workforce demand driven by new job growth is estimated at 1,700 to 2,400 workers (see Table 5). This suggests a potential workforce shortfall of approximately 700 to 2,800 workers in the next 3 years.

Figure 10 below illustrates the balance between labour supply and demand in the Wimmera Southern Mallee.

Figure 10 | The Wimmera Southern Mallee’s labour demand is likely to outstrip supply³¹





Extensive and holistic intervention is needed to address this shortage

This imbalance of labour demand and supply will occur unless intervention is taken to aid workforce attraction and retention. There are no large pools of untapped labour in the region, with the region's unemployment rate at a historical low of 2.7%. Easing short-term labour shortage pressures is dependent on attracting workers to the region through domestic and international migration, in addition to applying other levers to improve productivity and participation of the existing workforce.

Securing the required workforce is a shared challenge

The region's labour shortage demands a holistic approach. A lack of available and affordable housing acts as a barrier to attracting workers from metropolitan and other regional areas and is heightened during seasonal peaks. Inaccessibility of child care prevents parents, particularly female workers, from fully participating in the workforce. Insufficient digital and physical infrastructure further hinders workforce attraction to the region and workforce mobility within the region. Government, industry and the community of the Wimmera Southern Mallee need to take a collaborative approach to create timely solutions to the region's problems.



Opportunities to deliver a skilled workforce

Labour shortages are widespread across regional Victoria and the problem is particularly acute in the Wimmera Southern Mallee.³² Labour supply challenges in the region extend beyond the availability of workers with accredited training, with many businesses willing to take on any worker, regardless of experience or qualification, to fill vacancies.

While the focus of the opportunities in this profile is on training and skills, a skilling response alone will not be sufficient to meet the region's workforce supply challenges. What is required is a holistic approach to securing the right workforce and to ensuring economic prosperity.

What underpins this holistic response is place-based collaboration between industry, education providers, the Wimmera Southern Mallee's community and all tiers and relevant departments of government. This will help to ensure an adequate supply of workers and that the education system aligns with future industry demand, so that the region's potential benefits can be captured.

Solutions required for systemic barriers

In addition to productivity measures (automation, changes to business models etcetera) to decrease reliance on labour, there are sources of labour that the region can access to address workforce shortages, provided systemic and long-standing barriers are addressed.

Although it remains unclear whether migration levels will return to, or exceed, pre-pandemic levels in the next 3 years, importing labour is likely a necessary measure for the region. Adjustments to immigration processing such as reducing long visa processing times (of more than 4 months for 50% of applications,^{33,34}) and securing a designated area migration agreement (DAMA) for the region, would support import of labour to the region and make a major contribution to meeting demand for new workers in the next 3 years. Adjustments to the Skills Priority List to better reflect region-specific demand for some in-demand occupations (such as food scientists) would also be of benefit.³⁵

Workforce retention could be aided by bridging a mismatch between the expectations of young people and the reality of local employment opportunities. The taskforce reported a long-term trend of young people leaving the region to pursue higher education and employment opportunities that differ from what employers in the region offer. Work to explore the needs, perspectives and behaviors of young people and their guardians in comparison to local career opportunities could help improve retention of young people, which would help ease the region's labour supply concerns.

Workers wanting to relocate (or return) to the Wimmera Southern Mallee are constrained by the lack of affordable and accessible housing, which is heightened for seasonal workers in agriculture and the visitor economy. Consistent with broader trends across Victoria, growth in house prices has exacerbated housing stress, which is already higher in some areas, including Horsham, than the Victorian average.³⁶ Affordable housing supply is also limited by insufficient supply of land that is appropriately zoned for residential building, resistance from some community members to higher density housing models and an inadequate workforce to plan, survey and build new houses.

The region's unemployment rate is at a historical low of 2.7%, which presents limited opportunity to attract more local workers. However, the region's labour force participation rate for females aged 25 to 54 is notably lower than the state average, suggesting that this cohort could be better utilised.²³ Improving participation of women in the labour force is arguably dependent on a marked increase in the availability of child care, which is severely restricted even in regional centres such as Horsham.²⁹ Other cohorts who are underrepresented in the workforce would benefit from wrap around and support services to increase participation.

Many parts of the Wimmera Southern Mallee are poorly connected by public transport and require employees to own a car to travel to and from work, presenting another barrier to workforce attraction, retention and participation. Lack of public transport infrastructure also limits youth participation in employment, particularly in industries including agriculture and the visitor economy that require a workforce away from major population centres. Changes to planning processes and innovative solutions to transport, accommodation and housing will be necessary to improve workforce attraction and retention.

Insufficient digital infrastructure presents another deterrent to workforce attraction and curtails workforce participation. Workers do not have comparable access to technologies of their metropolitan counterparts, which restricts learning, participation and productivity.



Table 6 | Opportunities for increasing labour attraction, retention and participation

Opportunities
<p>Advocate for and undertake long term regional development planning: Work across local government areas to identify and address critical infrastructure and service gaps that create barriers to workforce attraction and retention. Advocate at local, state and federal government for a systematic and flexible approach to regional development that may include infrastructure, amenity and planning solutions, that consolidate existing funds and programs. Advocate for place-based solutions and funding that are developed and expended by local experts and the community, and contribute to the development of the region's holistic value proposition.</p>
<p>Advocate for changes to immigration policy: Advocate to the Australian Government to address barriers to international immigrants working in the regions, including by updating the Priority Skills List to reflect critical skills gaps by region, for example food scientists and securing a Designated Area Migration Agreement (DAMA) for the region.</p>
<p>Identify short-term opportunities to leverage existing infrastructure for accommodation: Continue to build on work being undertaken with local councils, the community and employers to design and implement innovative, transport, accommodation and housing solutions, including for the seasonal workforce. Advocate for streamlined, risk-adjusted planning and approvals processes to expedite urgent, lower risk infrastructure solutions.</p>
<p>Advocate for support services to increase participation in the workforce: Advocate to the government and private sector investment to increase the availability of child care in the region and reduce the cost of parents and guardians with young families returning to work or increasing their hours of participation.</p>
<p>Advocate for greater support for people with non-vocational barriers to work: Advocate to the government and private sector to increase the availability of support services such as alcohol and other drug and mental health services in the region, to enable people to more successfully enter and remain in the workforce.</p>
<p>Seek investment and planning for appropriate digital infrastructure: Advocate to government for wholesale investment in necessary digital infrastructure, connectivity and accessibility to support all industries.</p>

Skills and training opportunities must take a whole-of-region view

A connected and responsive education and training system is an essential component of Victoria's response to the economic conditions that are prevalent across regional Victoria, and the Wimmera Southern Mallee in particular. The government's economic agenda is driving growth in critical and emerging industries, which require a skilled workforce.

In 2019, the Free TAFE initiative was launched to increase training participation for those occupations in highest demand. There are over 60 courses available attracting more than 100,000 enrolments, providing a pipeline of skilled workers for occupations in demand, but economic growth is continuing and more needs to be done.

Collaboration, integrity and inclusion are the key. The sector must direct its effort to the delivery of skilling that aligns with what learners need to start or build their career, while targeting those learners with socio-economic circumstances or educational backgrounds that act as a barrier to participation. Success, in large part, rests on the quality and relevance of education and training delivery that is supported by robust data and evidence to meet the needs of the labour market, industries and employers.

The education and training system has an important role to play to support the Wimmera Southern Mallee economy. The system can provide foundational training such as literacy, numeracy or 'job-ready' skill development to help people enter employment and can help produce a workforce with the most relevant skills or qualifications required of industry in both the current environment and the longer term. No single recommendation is expected to address all of the challenges and barriers facing the region. The suite of recommendations provided in this profile link together and collectively, can help address the many barriers to attraction, retention and development of a quality workforce.



‘Success, in large part, rests on the quality and relevance of education and training delivery that is supported by robust data and evidence to meet the needs of the labour market, industries and employers.’

Future workforce and skills requirements

Universal training and skills needs and opportunities

Recognising that the region possesses a tight labour market, and a projected labour supply shortage, universal skills and training levers should aim to maximise attraction and retention across all critical industries and improve the relevance of training as a whole.

This necessitates a highly flexible, cross-industry approach to training and upskilling the workforce, and the recognition of experience and transferable skill sets to support ease of moving from one job (or career) to another. This response should be implemented through all aspects of the Victorian training and skills system, including the region's TAFE, Adult Community and Further Education (ACFE) Learn Local providers, Registered Training Organisations (RTOs) and universities. It demands a joined-up view of a learner's journey as they move from secondary to post-secondary education into one or multiple job and career paths within the region. Table 7 provides a summary of the key opportunities to pursue for the region.

Table 7 | Universal training and skills opportunities in the region

Situation	Opportunity
Insufficient local workers to meet the needs of every industry	<p>Develop and improve visibility of cross-industry career pathways. For example:</p> <ul style="list-style-type: none"> encourage collaboration between education providers, local government and industry to identify and develop pathways to entry-level positions and further education for all cohorts, and promote these pathways to local primary and secondary school students improve and promote careers education and advice to young people, their parents and guardians, jobseekers and those currently not participating in the labour market ensure training and employment support program providers in the region are aware of cross industry career pathways and refer clients to professional careers advice when required promote upskilling courses that enable workers to progress their career within the region and across industries.
Some cohorts are underrepresented in employment in proportion to population	<p>Target recruitment and support activity to underrepresented cohorts. For example:</p> <ul style="list-style-type: none"> promote jobs and career pathways to secondary school students and adults in cohorts that are under-represented in a manner that is relevant and meaningful to them. This may include more personalised communications channels, events and materials provide or tap into existing financial and wrap-around supports for cohorts that are underrepresented to pursue relevant education and training modify and adjust TAFE, ACFE Learn Local and RTO delivery to support the needs of diverse cohorts support regional employers to access programs and services assist them to assess and improve their workforce development, recruitment, and retention practices, including their approaches to inclusion and diversity and skilling and upskilling.
Limited access to qualified trainers hinders skill development	<p>Incentivise trainers to gain accreditation and enter the education system. For example:</p> <ul style="list-style-type: none"> work with regulators to develop new approaches to gaining qualifications or improving recognition of existing expertise and experience explore innovative solutions to encourage industry workers to enter teaching, including workforce sharing, enterprise training, recognition of IP, financial recovery, increased leave loading, scholarships for teachers in dual sector institutions etcetera.



<p>Lack of local provision and financial barriers deters student participation</p>	<p>Expand local or nearby training provision. For example:</p> <ul style="list-style-type: none"> • bolster funding to enable successful training models (for example, extending the collaborative VET in schools model to the new VCE Vocational Major to continue and expand its reach • expand financial incentives to undertake further training (for example, the Tertiary Access Payment Program) • deliver necessary qualifications and traineeships for critical occupations, including undergraduate and postgraduate courses, locally via existing or satellite provider(s) • strengthen and facilitate provider collaborations to overcome challenges of thin markets • adjust funding approaches to improve viability of niche training in thin markets • consider creating regional study hubs in collaboration with training providers and local governments to support online learning and tutoring • consider opportunities for site-based trainers, ‘mobile’ and online training.
<p>Some qualifications do not reflect nor address contemporary practice</p>	<p>Ensure TAFE, university, ACFE Learn Local and RTO training is relevant to industry needs. For example:</p> <ul style="list-style-type: none"> • promote the concept of a Wimmera Southern Mallee skills ecosystem that can collaboratively identify and address contemporary skills needs between schools, ACFE Learn Local, VET and higher education • pursue flexibility in funding and regulatory requirements to enable local providers to respond swiftly to industry needs. For example, ‘Just in time’, accredited training – particularly via modules, skills sets, short-form credentials (micro-credentials) and online learning • update facilities and utilise industry partnerships to ensure courses provide adequate hands-on experience • establish a pathway for local businesses to provide feedback on training needs to local providers • engage industry (and students) in development and periodic revision of the curriculum • encourage joint proposals between industry and Wimmera Southern Mallee skills ecosystem providers to access and share available resources and good practice.
<p>The workforce would benefit from foundational skills and experience that can apply to numerous regional industries</p>	<p>Develop a trade-based, foundational ‘job’ for the region. For example:</p> <ul style="list-style-type: none"> • pilot a foundational placement that can lead to multiple jobs and careers in key regional industries • work with the new VCE Vocational Major to ensure relevance for the region • review and adjust parameters for recognition of prior learning and experience to enable smoother transfers between jobs and careers.

Specific skills and training needs and opportunities of each industry

Consultations with leaders and representatives across key industries in the region have identified opportunities to better align the education and training system with industry forecast workforce demand and skills requirements. The following industries are addressed, with commentary on the opportunities provided in the following section:

- Agriculture
- Food product manufacturing
- Construction
- Health care and community services
- Mineral sands mining
- Visitor economy, including the accommodation and food services, arts and recreation services, and retail trade industries.

Next steps

Industry, education and training providers, and government collectively will play an essential role to address labour supply problems, align the education system with future economic demand and realise benefits for the Wimmera Southern Mallee’s economy. It is expected that key leaders across the region will continue the conversation within and between their industries to support implementation and Taskforce members will be champions for change within their industry and the region.

In addition, there are opportunities for collaboration between employers to address shared challenges. Employers must recognise that they need to apply a regional rather than industry view to attraction and retention of the workforce and must work together to support workers to transition between industries (over time) if this is a preference and supports individual career progression. This requires a shift in mindset from promotion of individual industries to promotion of a regional career that may span more than one industry. Table 8 provides examples of opportunities for collaboration.

Table 8 | Opportunities for collaboration in the region

Situation	Opportunity
Some industries, in particular agriculture and visitor economy, struggle to attract labour to fill short-term or part-time jobs created by casual or seasonal workforce demand, and may be understated in workforce data	Explore opportunities for collaboration between employers: Employers could explore sharing a casual workforce or provide a sequence of work through consecutive seasons (such as a skills passport). There is potential to collectively train a pool of workers and offer contracts for the equivalent of full-time work with multiple employers.
A disconnect sometimes exists between the needs of industry and community and what education providers can deliver.	Sustain connections between training providers, schools, government and community: The region’s industry and community should regularly engage with education and training providers to highlight their needs. All parties should collaborate on an ongoing basis to develop solutions that address the region’s unique education and training needs.

Next steps

This profile provides a localised view of the Wimmera Southern Mallee’s education and training challenges and opportunities over the next 3 years. The following should be considered as part of the next phase of work:

- the profile complements the inaugural Victorian Skills Plan, which sets out Victoria’s skills needs and opportunities. Actions should dovetail with those in the Victorian Skills Plan.
- the Wimmera Southern Mallee regional taskforce manager should convene working groups to address opportunities identified in this profile. This includes implementation of ‘quick wins’ that can benefit the region in the next year, and longer-term advocacy work to support the skills need of emerging industries in the region.

- the taskforce should continue to advocate for the Wimmera Southern Mallee region at all levels of government, to help ensure that the region’s unique workforce challenges and education and training requirements are understood and supported.
- the VSA should help to convene a cross-departmental response to broader workforce challenges, in addition to support for education and training responses. It is recommended further work explores the needs, perspectives and behaviours of young people, workers and learners.

The profile, in addition to the region’s Regional Economic Development Strategy published by Department of Jobs, Skills, Industry and Regions, should support future planning for the region.



‘A shift in mindset is required from promotion of individual industries to promotion of a regional career that may span more than one industry.’



Appendix A: Industry profiles

Agriculture



Industry profile and outlook

Industry composition

Agriculture is the largest industry in the Wimmera Southern Mallee, accounting for 30% of gross value added (GVA) and contributing significantly to Victorian's agriculture consumption and exports. Agricultural production occurs across the region, with the industry the largest contributor by GVA in the Hindmarsh, Northern Grampians, West Wimmera, and Yarriambiack areas. The industry contributes to the region's economic prosperity, with agricultural products and manufacturing representing 80% of the region's international export value.⁴ The industry is inherently connected to the broader agribusiness industry, which includes the processing and distribution of food and fibre products.

The region's agriculture production predominately comprises of broadacre crops such as grains, pulses and oilseeds across the region, and livestock products such as wool and sheep meat in the southern area.⁷ Other products from the region include poultry, pigs, olives, and flowers.³⁷

The region is highly suited to large-scale cropping and mixed-farming systems, with 77% of the region's land used for primary production. Large areas of arable land, secure water supply, and freight rail infrastructure, economies of scale, and the presence of a strong transport corridor into South Australia are key competitive advantages in this region.^{4,38} The region is also supported by contemporary research and development infrastructure, including the Grain Innovation Park in Horsham, which reportedly attracts staff from over 30 countries to the region.⁴

Agricultural businesses in this region tend to be large, efficient enterprises³⁸ that possess significant land and capital equipment, which enables higher productivity through economies of scale. Consistent with broader state-wide trends, farms are consolidating and investing in automation to improve efficiency and capture more value.³⁹ Family owned and operated businesses are also critical to the region's agriculture industry. The taskforce reported the presence of 'farm families', where many family members work on the family's farm and are often supported by some off-farm income.

Current demand and outlook

Agricultural production is expected to be relatively steady in the next 3 years, subject to weather fluctuations, commodity prices, and biosecurity concerns. The Wimmera Southern Mallee Regional Economic Development Strategy recognises agriculture and food product manufacturing as a strategic strength for the region. The following drivers present opportunities for the industry:

- nation-wide growth in 3 key sub-industries. The region produces 26% of Victoria's grain output, 16% of the state's sheep meat, and 17% of wool production.³⁹ High international demand is set to fuel an increase in sheep meat exports and wool,^{40,41} and high global grain prices and favourable weather conditions are projected for crops.⁴²
- several government and private industry investments, including \$17 million in Wimmera Intermodal Freight Terminal to transform grain handling and storage, \$12 million to build a new glasshouse and grain hub at Horsham's Grains Innovation Park,¹⁵ \$8.5 million grain rail network upgrade, and \$8.2 million for a new doppler radar facility to provide real-time weather information and improve farm productivity.³⁹
- diversification into post-harvest activities, including food transport, processing, wholesaling, and retailing captures downstream value.
- rapid advances in technologies such as agricultural robotisation, data mining, and sensor technology⁴³ could boost productivity and economic growth. However, poor digital connectivity in remote areas across the region may constrain technological advancement.⁴

Workforce profile and outlook

Workforce composition

Agriculture is the second largest employing industry in the region, accounting for 19.9% of the region's workforce. Permanent on-farm roles include livestock farmers, crop workers, machinery operators, supervisors, and maintenance workers. Supporting roles are also critical to the industry, including management, accounting, compliance, risk assessment, and monitoring. Equipment suppliers, logistics operators, and independent agriculture specialist advisors are critical to the success of the broader agribusiness industry.

Workforce outlook

Even with relatively steady growth, the industry will likely require a large supply of additional workers to meet current vacancies and keep pace with changes in workforce dynamics:

- employers have reported high vacancies during the last 2 years, particularly in entry-level jobs such as livestock and grain handlers, with many having to reduce production and future expansion plans due to a lack of staff

- almost a third of workers in the region's agriculture industry are aged over 60. With an ageing workforce, the industry is on the verge of a high proportion of retirements, with the average age of owner-operators higher than other industries.⁴⁴

Technological advancements and farm consolidation are likely to reduce demand for entry-level and seasonal workers such as farm crop workers, livestock farmers, and grain handlers, which will be offset by higher demand for workers with technology and specialist skills, such as agronomy, accountancy, human resources, and IT. The broader agribusiness industry will also demand workers to meet growth, with workers needed to support agribusiness service providers such as rural merchandise, agribusiness consulting and equipment supply businesses. Table 8 shows key workforce indicators and estimated growth in the next 3 years. This provides an indicative estimate of workforce demand, based on taskforce estimates. Overall, the total jobs that need to be filled will be higher due to the number of existing vacancies.

Table 8 | Agriculture: key workforce indicators and estimated growth 2022–2025

Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
19.9%	4,450	0 to 0.5%	0 to 60	230	230 to 290*

* The agriculture industry will require an additional 300 seasonal workers during the harvest period each year.

The industry also employs a large casual, seasonal workforce in entry-level, on-farm positions, including crop workers, machinery operators, and shearers. Changes to visa regulations and pandemic restrictions have greatly reduced the availability of backpacker workforce to help fulfil some of these roles.⁴⁴ Recruitment from other regional Victoria regions is challenging given barriers such as availability of affordable housing and transport, and competition from those regions for the same workforce.

Table 9 describes the major occupations in the agriculture industry and their estimated growth over the next 3 years. This Profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 9 describes only workers in ANZSCO occupations that are directly attributed to the agriculture industry



Table 9 | Agriculture: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth (2023–25) ⁸
Mixed crop and livestock farmers	1,421	60 to 80
Crop farmers	733	30 to 40
Livestock farmers	694	30 to 40
Livestock farm workers	402	10 to 15
Agricultural, forestry and horticultural plant operators	65	10 to 15
Crop farm workers	246	10 to 15
Shearers	47	10 to 15
Mixed crop and livestock farm workers	171	10 to 15
Metal fitters and machinists	7	0 to 5
Agriculture and forestry scientists (including Agronomist)	116	0 to 5



Education and training outlook

Employers reported that they tend to hire for attributes including work ethic and attitude for entry-level and seasonal roles that do not require tertiary qualifications. Some entry-level and permanent workers require certifications to use machinery, chemicals or firearms, while tertiary education (and often higher education) is required for highly skilled and wrap-around roles in accounting, technology, and agronomy.

Employers are generally satisfied with the quality and availability of agriculture training. Longerenong College, in particular, is recognised as one of Australia's leading tertiary institutions specialising in agriculture and land-management. The college runs a 1,070-hectare demonstration AgTIDE DATA Farm to help upskill workers in the latest digital agriculture technologies,⁴⁵ and has recently been allocated funding to build accommodation for another 45 students, in recognition of the college's role in upskilling future agricultural professionals in the region.⁴⁶

Workers with qualifications from Longerenong College and other training organisations in the region are in high demand from industry. However, employers have highlighted gaps in local training opportunities for high-skilled workers, such as agricultural science, information technology, and business degrees. Employers reported a reliance on recruiting employees who have studied outside the region, and desire local provision of undergraduate and post-graduate courses. Similar accessibility issues are seen for seasonal workers seeking to undergo short-course training for entry-level skills. There are opportunities to introduce specific, short-course tickets, such as basic harvesting, livestock management, and safety skills.

Table 10 below outlines the key VET qualifications for workers in the agriculture industry, the number of enrolments in the region, and the anticipated training requirement in the next 3 years. Anticipated training requirement is based on each occupation's forecast growth, state-wide training trends, and input from industry representatives.

Table 10 | Agriculture: key qualifications and VET training requirements

Occupation groups (ANZSCO)	Top qualifications	2020 enrolments ⁴⁷	Anticipated training requirement
Farmers and farm workers	Certificate III in Agriculture	60	Consistent demand
	Certificate II in Agriculture	80	Consistent demand
	Certificate III in Horticulture	20	Consistent demand
	Certificate III in Poultry Production	25	Consistent demand
Farmers and farm managers	Certificate IV in Agriculture	10 (12)*	Likely increase in demand
	Adv Dip. Of Agribusiness Management	10 (30)*	Likely increase in demand
Agriculture and forestry scientists (including agronomist)	Diploma in Agronomy	10 (34)*	Likely increase in demand
Shearers	Course in Introductory Shearing	10	Consistent demand
	Certificate IV in Wool Classing	65	Consistent demand

* The taskforce reported that data may not reflect the actual number of enrolments in some courses. When this is the case, enrolments from the official dataset are reported first, and taskforce-adjusted numbers are reported in brackets.



In addition to the above listed VET qualifications, the following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Agricultural science and agronomy for example, Bachelor of Agriculture and Bachelor of Agricultural Sciences
- Business and management for example, Bachelor of Commerce, Bachelor of Business and Bachelor of Information and Communications Technology
- Marketing and communications for example, Bachelor of Marketing.

Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the agriculture industry. Table 11 provides an outline of key findings.

Table 11 | Opportunities for the agriculture industry

Situation	Opportunity
<p>Employers struggle to recruit young people, especially those with high-value, specialist skillsets and qualifications</p>	<p>Collaborate with secondary education providers to stimulate interest and improve pathway to entry-level positions. For example:</p> <ul style="list-style-type: none"> • engage with secondary school career counsellors to deliver the value proposition of working in agriculture and to dispel myths about what agriculture jobs look like or don't look like • promote pre-apprenticeship programs (for example, AgCareerStart) to help to change narrative and mindset on ag opportunities and industry lifestyle • promote experiential activities, such as farm visits, study tours, camps. <p>Collaborate with tertiary education providers, especially universities, to position agriculture as an attractive long-term career pathway for students in IT, commerce, and engineering. For example:</p> <ul style="list-style-type: none"> • engage with university career services to deliver the value proposition of working in agriculture and to dispel myths about what jobs in the agriculture industry look like or don't look like.
<p>Long-form qualifications are less suited to the seasonal nature of the local workforce</p>	<p>Improve learning flexibility by introducing staggered learning options, so students can upskill in between harvest seasons.</p>
<p>Existing short courses do not fully cover the needs of entry-level seasonal jobs</p>	<p>Introduce short courses that support quick upskilling. For example:</p> <ul style="list-style-type: none"> • introduce cost-effective short training courses (1 to 5 days), like the shearing course, to cover basic harvesting, livestock, machinery, and safety skills for entry-level seasonal jobs • introduce digital and agri-tech short courses that enable workers to flexibly build on entry-level training and stack their skillsets.
<p>Current facilities do not enable the delivery of modern agriculture courses</p>	<p>Ensure local training facilities can provide industry-relevant training. For example:</p> <ul style="list-style-type: none"> • provide funding to upgrade and build contemporary facilities for modern agriculture training • support the development of local facilities to position the region as a Centre of Excellence in the agriculture industry • invest in facilities that enable students to develop emerging skillsets for example, data skills, technology.



Food product manufacturing

Industry profile and outlook

Industry composition

Food product manufacturing accounts for 3% of gross value added (GVA) in the region. The industry is experiencing high growth, with gross value added (GVA) growing at a 13% compound annual growth rate (CAGR), between 2017 and 2020. This recent growth marks a turnaround from the trend over the last 10 to 15 years, which has seen a number of food product manufacturers leave the region. Food product manufacturing stakeholders reported a strong desire for the industry to continue to grow in the region.

The industry is intrinsically linked to the region's strong agriculture industry, with production including grains, cereal, pulse, and meat-based products. Major producers operate across the region, including meat processors Frews in Stawell, Luv-a-duck in Nhill and plant-based protein producer Australian Plant Proteins near Horsham. The region also supplies workers to food processors across the South Australian border, including Teys in Naracoorte and JBS in Bordertown. Smaller artisanal producers produce goods such as olive oil and speciality baked products across the region.¹⁶

The region's road and freight rail transport pathways and location on the main highway, between Melbourne and Adelaide, enables the industry to easily access raw materials and supplies and to transport products out of the region. These connections, and the region's strong agricultural presence, enables the industry to account for over two thirds of the broader manufacturing industry's production, and over 80% of total manufacturing exports.⁴

Current demand and outlook

The industry is expected to grow in the next 3 years. It is well-placed to meet emerging consumer trends, including demand for value-added food products produced locally⁴⁸ and for artisanal foods produced in rural areas.⁴⁹ Employers reported a desire to see the industry develop differentiated products to compete in the global food product market, such as protein powders and ready to eat meals.

The industry is set to increase production to meet these consumer trends. Major producers in the region reported forthcoming investments to expand production, including:

- a \$45.7 million investment for Australian Plant Proteins from Bunge, a global agri-food company, to support the Horsham-based processor to expand production of non-genetically modified value-add products⁵⁰
- a planned \$60 million investment from meat processor Frews to expand existing production by 2024
- plans for meat processor Luv-a-duck to upgrade the meat processor's existing facility in Nhill.

The region's research and development capabilities will support the industry's ability to grow. The Horsham-based Grains Innovation Park is a world leader in agriculture and food product research and innovation. The Park's potential to develop new production techniques and digital technology for food manufacturing businesses will be supported by \$12 million in funding to develop facilities that enable grain crop industries to diversify into the plant-based protein market.⁵¹

The industry's ability to meet current demand and capitalise on these growth opportunities will depend on the availability of labour, which is already in substantial shortage in the region.

Workforce profile and outlook

Workforce composition

Food product manufacturing is the 10th largest employing industry in the region, comprising 4% of the region's workforce.

Entry-level roles include processing workers, packers, and slaughterers. Larger businesses typically have a critical team of workers skilled in food science, recipe development, and quality assurance, who are supported by a broader management, human resources, and administration team. Artisanal producers are typically sole traders who have a variety of responsibilities, including production, marketing, and administration.

Workforce outlook

The food product manufacturing industry is expected to require a large supply of additional workers, to meet current vacancies and keep pace with industry growth. Employers reported that difficulty finding sufficient workers in entry-level roles, such as processors and packers, was currently hindering operations and reduced the financial appeal of further investment. Employers also reported that difficulty finding workers with specialised skill sets, such as food scientists, may act as a bottleneck to further development.

Table 12 shows key workforce indicators and estimated growth in the next 3 years. This provides an indicative estimate of workforce demand, based on taskforce estimates. Overall, the total jobs that need to be filled will be higher due to the number of existing vacancies.



Table 12 | Food product manufacturing: Key workforce indicators and estimated growth 2022–2025

Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
3.7%	965	8 to 10%	240 to 310	50	300 to 360

The industry has a high proportion of culturally and linguistically diverse (CALD) workers. Luv-a-duck employs a large proportion of the Nhill-based Karen-Myanmar population, which is reported to aid workforce attraction and builds a sense of community within the workforce.⁵² However, employers reported that CALD workers require additional language support to work and undertake training.

Employers reported previous success with international worker migration. Recent changes to visa regulations and pandemic restrictions have greatly reduced the feasibility of labour migration over the last 2 years, with employers reporting that 50% of visa processing times exceed 4 months. This profile defines occupations using ANZSCO classifications and associates a proportion of

each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 13 describes only workers in ANZSCO occupations that are directly attributed to the food product manufacturing industry.

Table 13 describes the major occupations in the food product manufacturing industry and their estimated growth over the next 3 years. This Profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 13 describes only workers in ANZSCO occupations that are directly attributed to the food product manufacturing industry.

Table 13 | Food product manufacturing: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth (2023–25) ⁸
Meat, poultry and seafood process workers	70	50 to 60
Packers	107	30 to 40
Meat boners and slicers, and slaughterers	146	20 to 30
Structural steel and welding trades workers	123	20 to 30
Other hospitality, retail and service managers	50	10 to 20
Handypersons	6	10 to 20
Metal fitters and machinists	36	10 to 20
Production managers	25	10 to 10
Bakers and pastrycooks	34	10 to 10
Product quality controllers (including safety and quality assurance analysts)	7	0 to 10

Education and training outlook

Employers typically seek employees with formal qualifications. Skilled roles including food scientists, IT staff, and quality assurance workers require a degree level qualification. Workers in packing and processing roles and other hands-on roles such as electricians, maintenance workers and fitters, and turners typically hold a certificate level qualification. Employers also value workers who demonstrate safety awareness and who possess problem-solving, time management, and effective communication skills.

Employers reported broad satisfaction with the quality of education and training. Workers in practical roles are typically encouraged to undertake certificate level training, such as a Certificate II or III in Meat Processing or a Certificate IV in Food Processing, with employers facilitating in-house training during work hours.

Given the industry's high proportion of CALD workers, participation in training and skill development demands an approach that accommodates their needs. Employers exhibited an enthusiasm to employ CALD workers, and use literacy, numeracy, and language skill development

programs and additional wrap-around services, to enable these workers to access and complete training. Employers reported satisfaction with community-based learning support, such as Nhill Neighbourhood House, but want further resources to ensure these workers are adequately supported to complete training.

The industry reported gaps in training provision and quality. Small artisanal producers desire agribusiness training to cover business related topics including marketing, finance, and management skills, rather than an intense focus on agricultural topics. These producers desire training that is flexible and self-paced, enabling them to upskill while undertaking a range of roles within their small business. Employers also desire training that enables workers to upskill towards management, including leadership, conflict resolution, and emotional intelligence training.

Table 14 below outlines the key VET qualifications for workers in the food product manufacturing industry, the number of enrolments in the region, and the anticipated training requirement in the next 3 years. Anticipated training requirement is based on each occupation's forecast growth, state-wide training trends, and input from industry representatives.

Table 14 | Food product manufacturing: key qualifications and training requirements

Occupation groups (ANZSCO)	Top qualifications	2020 enrolments ⁴⁸	Anticipated training requirement
Food trades workers	Certificate III in Food Processing	40	Likely increase in demand
	Certificate II in Meat Processing (Food Services)	30	Likely increase in demand
	Certificate III in Meat Processing (Food Services)	35	Likely increase in demand
	Certificate III in Meat Processing (Retail Butcher)	10	Likely increase in demand
	Certificate IV in Meat Processing (Meat Safety)	5	Likely increase in demand
Mechanical and engineering trades workers	Certificate II in Engineering Studies	35	Likely increase in demand
	Certificate IV in Engineering	20	Likely increase in demand
	Certificate III in Engineering - Mechanical Trade	10	Likely increase in demand
Fabrication engineering trades workers	Certificate III in Engineering - Fabrication Trade	55	Likely increase in demand
Artisanal food product business owner	Advanced Diploma of Agribusiness Management*	10	Likely increase in demand
Baker	Certificate III in Baking	5	Likely increase in demand

* Advanced Diploma of Agribusiness Management is likely also utilised by the agriculture industry.



In addition to the above listed VET qualifications, the following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Agribusiness for example, Bachelor of Agribusiness, Bachelor of Agriculture
- Food science and development for example, Bachelor of Science with a Food Science major, Bachelor of Food and Nutrition
- Management for example, Bachelor of Management, Bachelor of Commerce, Master of Business Administration

Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the food product manufacturing industry. Table 15 provides an outline of key findings.

Table 15 | Opportunities for the food product manufacturing industry

Situation	Opportunity
Students are less inclined to specialise in food science, compared to nutrition	Collaborate with tertiary education providers, especially universities, to position food science as an attractive long-term career pathway for science students. For example: <ul style="list-style-type: none"> • engage with university career services to deliver the value proposition of working in food science and to dispel myths about what jobs in the food product manufacturing industry look like or don't look like.
The industry struggles to attract sufficient workers	Develop and articulate career opportunities in the industry. For example: <ul style="list-style-type: none"> • develop materials that articulate potential career pathways within the industry • promote the benefit of developing transferable skills within the industry.
Local workers from non-English speaking backgrounds face additional learning barriers	Provide additional support for workers from non-English speaking backgrounds. For example: <ul style="list-style-type: none"> • promote adult English language classes (for example, migrant support from the Centre for Participation)⁵³ and English language wrap-around support services in the workplace • targeted investment in developing multi-lingual communications materials and, or visual support materials to enhance training (and workforce) participation.
Employers are not fully aware of the range of leadership training available	Promote leadership-focused competency units including: <ul style="list-style-type: none"> • manage personal stressors in the work environment • respond effectively to behaviours of concern • lead difficult conversations through industry networks (for example, Wimmera Business Centre). Courses should be accessible online and in a self-paced style (for example, Victorian Chamber of Commerce courses)⁵⁴.
Current courses do not fully cover the needs of small food production businesses	Develop additional competency units to support small and medium enterprises, including: <ul style="list-style-type: none"> • manage supply chains • meet quality assurance standards • access existing government support for new business ventures. • These competency units should be developed as a short course or incorporated into the Certificate IV in Agribusiness and, or Certificate IV in Entrepreneurship and New Business.



‘Strong growth and expansion prospects in other industries of clean energy, agriculture and tourism are expected to drive continued growth in commercial and civil construction.’

Construction



Industry profile and outlook

Industry composition

Construction is the 4th largest industry in the region and accounts for nearly 6% of economic gross value added (GVA). The industry serves residential, commercial, and civil markets as well as agriculture, clean energy asset construction, and transport infrastructure. Construction activity is centred on the regional centre of Horsham but occurs across the region.

Residential construction is an important enabler of growth in other industries, supplying housing for residents and the region's workforce and supporting accommodation for tourists. Residential construction activity has strongly increased in this region, with the number of residential building approvals increasing by 29% annually over the last 2 years.⁶ Most residential construction activity is centred in Horsham, reflecting the population concentration in the region.¹²

The commercial and civil construction sub-sectors incorporate the construction of industrial and large-scale projects, such as freight loading terminals, wind and solar farms and agricultural storage assets. Employers reported extensive commercial and civil construction in the last 12 months, with an increase in clean energy production, government infrastructure investment and high grain prices fueling demand for additional construction.

Current demand and outlook

The demand for residential construction is likely to continue to increase, driven by:

- government stimulus and residential housing initiatives. Victoria's Big Housing Build has guaranteed a minimum investment of \$15 million to build 25 social housing homes in Horsham.⁵⁵ Other initiatives include the new Regional Home Guarantee,²² which allows eligible applicants to build or buy newly built homes in regional Australia with only a 5% deposit.
- an increase in the number of people moving to regional Victoria during and post pandemic,⁵⁶ which has stimulated demand for the construction of homes and rental properties in regional areas.⁵⁷
- increased demand to purchase, rent and renovate properties as household incomes rise, interest rates fall and speculative demand increases.⁵⁸ Horsham house prices have increased by approximately 60% in the last year, indicating that demand for residential property in the region has outstripped the available supply.⁵⁹

Strong growth and expansion prospects in other industries of clean energy, agriculture and tourism are expected to drive continued growth in commercial and civil construction. Large infrastructure investments and prospects in the region include:

- the \$370 million Western Victoria Transmission proposal, which plans to upgrade the state's transmission network to connect large scale wind and solar in the west into the grid.⁶⁰ The project proposes a new transmission line starting at Bulgana, near Stawell in Victoria's west, to Sydenham in Melbourne's northwest.
- clean energy investment, including 2 under-construction projects – the Bulgana Green Power Hub and Murra Warra wind farm, which makes use of the region's rich wind resources.
- the region also has considerable solar energy generation potential (1400 to 1700 kWh/kWp per year), particularly in the north of the region.⁴ A number of projects are billed for construction in the next 3 years, including the 130MW Esco Pacific solar farm near Horsham,⁶¹ and a range of smaller farms near Stawell and Nhill.⁶² The viability of these projects is dependent on the availability of electricity transmission infrastructure.³⁵

The increase in demand for residential, commercial and civil construction presents a sizeable growth opportunity for the region but may exacerbate existing labour and material shortages. Shortages for key building materials such as for structural timber extend beyond Wimmera Southern Mallee as a concern for many regional areas, exacerbated by the pandemic induced global supply chain disruptions.⁶³ Employers reported concern about the impact of material and labour shortages on their financial performance and cited incidences of Victorian-based construction companies entering insolvency.

Workforce composition and outlook

Workforce composition

Construction is the seventh largest employing industry in the region, accounting for 5.8% of the region's workforce. Consistent with broader national-wide trends, the industry's workforce is predominantly male.

Businesses in the construction industry are diverse, comprising sole traders, small businesses, subcontractors, and large corporations. Small to medium businesses often hire directly, while larger businesses rely more on subcontractors. The region's construction industry has over 500 businesses, with 98% of these businesses employing less than 20 workers.²⁷

Common construction roles include electricians, plumbers, diesel mechanics, welders, painters, fencers, plasterers, carpenters, bricklayers, landscapers and concreters as well as related labourers and technicians. Other roles include surveyors, drafters, project managers, engineers, architects, earthmoving workers and truck drivers. Experienced workers in construction may then transition to supervisor or manager roles.

Businesses that focus on residential, commercial, or civil projects have different composition of roles. Businesses also employ a variety of support staff, including in accounts, sales, marketing, personal assistants and other related roles. The region's construction industry is supported by workers in other industries, including electrical and mechanical engineers.

Workforce outlook

With predicted relatively high growth, the industry will require a large supply of additional workers to meet current vacancies and keep pace with the growth:

- employers have reported high levels of existing vacancies, especially for skilled workers, including plumbers and electricians, and supervisors³⁵
- the construction of mineral mines, wind and solar farms will create demand for electricians, earthmoving workers, and labourers. Competition for workers in these roles is expected to be acute, with these roles typically in-demand by other industries including agriculture, food product manufacturing and mining as well as residential and civil construction
- as in other regions and states, employers reported that the industry can sometimes suffer from reputational barriers to workforce attraction, with perceptions and the reality of long hours, safety concerns and negative stigma are equally prevalent in this region.

Table 16 shows key workforce indicators and estimated growth in the next 3 years. This provides an indicative estimate of workforce demand, based on taskforce estimates. Overall, the total jobs that need to be filled will be higher due to the number of existing vacancies.

Table 16 | Construction: key workforce indicators and estimated growth 2022–2025

Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
5.8%	1,300	3 to 3.5%	150 to 180	80	230 to 260

Employers reported using overseas immigrant labour to fill acute shortages, such as welders. However, changes to visa regulations and pandemic restrictions have greatly reduced the feasibility of using migration to address labour shortages over the last few years. Competition with other regions for construction workers, as well as with other industries capable of offering greater remuneration, will further hinder attraction and retention of construction workers.

Table 17 describes the major occupations in the construction industry and their estimated growth over the next 3 years. This Profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 17 describes only workers in ANZSCO occupations that are directly attributed to the construction industry.



Table 17 | Construction: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth (2023-25) ⁸
Electricians	120	30 to 40
Plumbers	212	20 to 30
Earthmoving plant operators	86	20 to 30
Construction managers	234	20 to 30
Carpenters and joiners	129	10 to 15
Gardeners	44	10 to 15
Metal fitters and machinists	5	10 to 15
Structural steel and welding trades workers	6	10 to 15
Painting trades workers	47	10 to 15
Bricklayers and stonemasons	6	5 to 10



Education and training outlook

VET is the primary pathway into and through the construction industry. The industry relies heavily on skilled tradespeople, with VET level qualifications such as a Certificate III in Plumbing, Certificate III in Electrotechnology or Certificate III in Carpentry required for major occupations. Apprenticeships and traineeships are highly valued, and many are government funded.

Other entry level opportunities and pathways exist for labourers who mostly don't hold a post-school qualification but may require licenses such as a Construction Induction Card (White Card) or a Working in Confined Spaces. Some roles supporting the construction industry require a higher education qualification, including engineering, architecture and surveying services. Employers also hire for attributes including work ethic, willingness to learn, adherence to safety requirements and capacity to meet the physical requirements of the role.

Employers are generally satisfied with the quality of construction training; however, the lack of local training providers is a challenge for the industry. The lack of local provision deters workers, especially younger workers without their own vehicle, from entering the industry or undertaking further training. Employers reported that some workers needed to travel to other regions, such as Warrnambool, Bendigo and Ballarat, to complete qualifications such as the Certificate III in Plumbing.

Table 18 below outlines the key VET qualifications for workers in the construction industry, the number of enrolments and the anticipated training requirement in the next 3 years. Anticipated training requirement is based on each occupation's forecast growth, state-wide training trends, and input from industry representatives.

Demand for certificate and degree level qualifications in the region is expected to increase in the next 3 years, driven by demand for workers in their associated occupations. This aligns with the Australia-wide projection that demand is likely to grow over the next 3 years.⁶⁴ The challenge will be the lag in supply, given the time it takes to complete tertiary level qualifications.

Table 18 | Construction: key qualifications and training requirements

Occupation groups (ANZSCO)	Top qualifications	2020 enrolments ⁴⁸	Anticipated training requirement
Construction trade workers	Certificate III in Civil Construction	55	Likely increase in demand
	Certificate III in Electrotechnology Electrician	50	Likely increase in demand
	Certificate III in Engineering - Fabrication Trade	55	Likely increase in demand
	Certificate III in Carpentry	65	Likely increase in demand
	Certificate III in Civil Construction Plant Operations	25	Likely increase in demand
	Certificate III in Engineering - Mechanical Trade	10	Likely increase in demand
	Certificate III in Plumbing	55	Likely increase in demand
Pre-apprentice construction trade workers	Certificate II in Building and Construction (Pre-apprenticeship)	80	Likely increase in demand
	Certificate II in Plumbing (Pre-apprenticeship)	15	Likely increase in demand
	Certificate II in Electrotechnology (Career Start)	20	Likely increase in demand



In addition to the above listed VET qualifications, the following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Engineering, for example, Bachelor of Engineering, including civil, environmental and electrical engineering
- Management, for example, Bachelor of Management, Bachelor of Commerce
- Surveying, for example, Bachelor of Building Surveying

Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the construction industry. Table 19 provides an outline of key findings.

Table 19 | Opportunities for the construction industry

Situation	Opportunity
Employers struggle to recruit people from diverse backgrounds, especially women and CALD people	Actively recruit people from diverse backgrounds. For example: <ul style="list-style-type: none"> • promote career pathways and provide support through the Women in Apprenticeship scheme and Workforce Training Innovation Fund (WTIF) • financially incentivise diverse cohorts to participate (for example, Portland Aluminium introduced the Women in Trades scholarship⁶⁵) • targeted investment in developing multi-lingual communications materials
The shortage of supervisors limits employers' capacity to bring on apprentices	Strengthen articulation pathways from qualified apprentice to supervisor and from supervisor into a management position. For example: <ul style="list-style-type: none"> • better articulate career pathway (that is, the training and time required for an apprentice to progress to a supervisor) • support upskilling in specification, estimation, plan reading project management and business management.
Insufficient placements to meet apprentice demand	Create greater apprenticeship and learning opportunities in the region. For example: <ul style="list-style-type: none"> • reduce the administrative effort for employers to take on and manage apprentices • enable apprentices to begin classroom-based learning while they wait for placements • provide financial support for out-of-region workers to become an apprentice supervisor in the region.
Lack of local provision deters student participation	Expand local training provision. For example: <ul style="list-style-type: none"> • consider delivering high demand qualifications, such as Certificate III in Plumbing, and skillsets locally • ensure local students have appropriate access to the VCE Vocational Major program⁶⁶.
Not all apprentices have a positive and beneficial experience	Improve apprenticeship experience. For example: <ul style="list-style-type: none"> • ensure supervisors and experienced staff are available to provide training and mentoring for example, engage with Apprenticeships Victoria to leverage student experience initiatives • utilise group training opportunities with mentoring capabilities • strategically rotate apprenticeships and trainees across local projects and employers to better cross-skill and retain apprentices • support employers to improve their diversity, inclusion and workforce development and retention practices.



Health care and community services

Industry profile outlook

Industry composition

Health care and community services is the second largest industry in the Wimmera Southern Mallee by production, accounting for 13.8% of gross value added (GVA) in the region. Health services are provided across the region, with the industry contributing to GVA in each of the region's 5 local government areas (LGAs). Local service provision is highly valued by the region, given it is often not feasible to travel long distances to regional centres outside of the region and some areas of the region have relatively high levels of socio-economic disadvantage.²⁴

The health care and community services industry comprises of a range of services, including allied health, hospital-based care, aged care, disability support, mental health, social assistance, family violence, general practitioner and childcare services. Services are delivered by a range of small and large organisations including hospitals, clinics, for-profit and community-based organisations. Wimmera Health group operate the main hospital in the region, Wimmera Base Hospital in Horsham, and have recently amalgamated with 3 other regional healthcare service providers to form Grampians Health.⁶⁷ Smaller community-based organisations provide allied and community health across the region, particularly in smaller and more isolated areas.

The health care and community services industry plays a critical role in enabling workforce participation in other industries. Limited local childcare provision allows for some parents to return to the workforce, particularly for female workers. The industry also enables people with substance misuse issues to receive appropriate support and return to work, with relatively high numbers of alcohol and other drug treatment services reported in the region.^{25,26}

Current demand and outlook

Health care and community services provision is expected to grow in the next 3 years, driven by government reforms, the pandemic recovery and the region's population demographics. The Wimmera Southern Mallee Regional Economic Development Strategy recognises the growth in the health care and social services sectors as an opportunity to generate further employment and multiplier effects for the local economy. Drivers of growth include current government investments, including:

- investment to increase service provision, including funding to establish Orange Door, a family violence safety hub, in Horsham in 2022,⁶⁸ and \$2.8 million to support the Early Years Innovation Hub, a place-based child support service provider.²⁵
- funding from round 5 of the Regional Health Infrastructure Fund to upgrade local health facilities, including equipment upgrades for Stawell Regional Health, Edenhope and District Memorial Hospital, Rural Northwest Health and West Wimmera Health Service.⁶⁹
- \$9.1 million to build and operate a local Aboriginal family violence refuge in the region, that provides crisis accommodation and support services.⁷⁰
- funding for Three-Year-Old Kindergarten, with subsidised services to be rolled out across the region.⁷¹

Further growth in demand for health care and community services is likely to be driven by:

- further investment in response to Royal Commissions into Mental Health and Aged Care. The Wimmera Southern Mallee has a particular need for mental health services, with some areas reporting incidences of anxiety and depression well above the state average.²⁶
- the region's ageing population, with the Wimmera Southern Mallee over-represented in the 50 to 85 year old age brackets, is likely create increase demand for health and aged care services.³⁰
- the region's relative socioeconomic disadvantage, with Northern Grampians, Yarriambiack and Hindmarsh among Victoria's most disadvantaged LGAs. Lower socioeconomic status is generally associated with poorer health outcomes.

Ability to meet current demand for services and the forecasted growth in demand may be constrained by the availability of labour, which is already in significant shortage in the region and exacerbated by staff experiencing burnout due to overwork and pandemic driven demand.⁷²



Workforce composition and outlook

Workforce composition

Health care community services is the largest employing industry in the region, employing 20% of the region’s workforce. Consistent with broader national-wide trends, the industry’s workforce is predominantly female.

Roles include registered nurses, general practitioners, aged care and disability support workers, allied health professionals, child carers and mental health support workers. This workforce is also supported by a range of non-health-specific roles such as kitchenhands, receptionists and cleaners, in addition to health care and community services, administration and management roles.

Workforce outlook

The industry will require sizeable workforce growth to fill existing labour shortages and meet future demand for services.

- Employers reported numerous existing vacancies, with multiple health care and community service providers capable of employing 10 to 50 employees immediately. Employers estimate a 20% increase in particular occupations including allied health professionals (such as occupational therapists, physiotherapists and speech pathologists), doctors, nurses and mental health workers is needed to meet existing demand.

- Employers reported that the quantity of students completing mental health and paediatrics pathways within occupational therapy courses was vastly insufficient relative to industry demand, creating a severe workforce shortage in these occupations.
- Employers face difficulty in finding appropriately skilled workers. For example, employers reported difficulty accessing government funding that have strict worker eligibility guidelines, which can leave allocated funding unused for 6 to 12 months. Local Aboriginal and Torres Strait Islander health service providers have reported difficulty finding suitably qualified people of appropriate cultural background.
- Employers expect that large numbers of replacement workers will be needed in response to workforce attrition driven by burnout from the impact of the pandemic on working conditions and the retirement of older workers. In addition, the demand for workers in other industries with perceived better working conditions has the potential to pull the current workforce out of the health care and community services industry.

Table 20 shows key workforce indicators and estimated growth in the next 3 years. Current estimates are based on existing datasets and growth estimates are based on NSC employment projections, taskforce estimates and input from industry representatives.

Table 20 | Health care and community services: key workforce indicators and estimated growth 2023–25

Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
20.4%	4,550	3 to 4%	420 to 640	190	610 to 820

Changing skill dynamics may require and create changes in workforce composition. Telehealth and other digital service delivery channels can enable greater workforce sharing and service provision in regional and rural locations. Workers in the industry must develop sufficient digital literacy skills to ensure they can appropriately use these technological innovations to provide services.

Table 21 describes the major occupations in the health care and community services industry and their estimated growth over the next 3 years. This profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 21 describes only workers in ANZSCO occupations that are directly attributed to the health care community services industry.

Table 21 | Health care and community services: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth (2023–25) ⁸
Registered nurses	782	110 to 150
Aged care and disability carers	952	100 to 130
Nursing support and personal care workers	162	30 to 40
Commercial cleaners	134	20 to 30
Receptionists	236	20 to 30
Kitchenhands	160	20 to 25
Welfare support workers (including mental health workers)	170	20 to 25
General clerks	128	20 to 25
Midwifery professionals (including enrolled maternal and child health nurses)	114	10 to 20
Child carers	115	10 to 20
General practitioners	47	5 to 15
Occupational therapists	49	10 to 15
Physiotherapists	42	10 to 15
Pharmacists	8	0 to 5



Education and training outlook

Employers typically desire and require employees hold formal qualifications. Professional health staff, such as registered nurses, GPs and psychologists require degree level qualifications. Other roles, such as allied health aides and aged care workers require certificate level qualifications. Higher education and vocational qualifications typically require 3 to 4 years to complete, which creates challenges in filling immediate workforce shortages for roles that require formal qualifications.

Support roles such as cleaners, receptionists and kitchenhands do not require formal qualifications. Employers also value workers who demonstrate kindness, empathy, and communication skills.

Employers are generally satisfied with the quality of workforce training but perceive that a more practical educational approach could aid skill development. Employers value employees that can engage with patients to provide practical support, and thus desire employees to undergo more practical, hands-on training in addition to the theoretical curriculum. However, employers also acknowledged the difficulty associated with supervising placement students when existing employees are stretched to meet service demand.

Workers could benefit from training and education programs that develop transferable skills, such as person-centred care and communication. Employers expressed support for programs that aid career progression, including peer support groups, communities of practice and professional development opportunities. These programs could complement existing formal qualifications to aid workforce attraction and retention. Employers expressed some dissatisfaction with local job network operators, with the perception that these providers may be prioritising financial gain over student outcomes.

Table 22 below outlines the key VET qualifications for workers in the health care and community services industry, the number of enrolments in the region and the anticipated training requirement in the next 3 years. Anticipated training requirement is based on each occupation's forecast growth, state-wide training trends and input from industry representatives.

Table 22 | Health care and community services: key qualifications and training requirements

Occupation groups (ANZSCO)	Top qualifications	2020 enrolments ⁴⁸	Anticipated training requirement
Therapy aide	Certificate III in Allied Health Assistance	10	Likely increase in demand
Enrolled nurse	Certificate III in Individual Support	220	Likely increase in demand
	Diploma of nursing	80	Likely increase in demand
Aged care and disability worker	Certificate IV in Ageing Support	80	Likely increase in demand
	Certificate IV in Disability	90	Likely increase in demand
Child carer	Diploma of Early Childhood Education and Care	75	Likely increase in demand
	Certificate III in Early Childhood Education and Care	100	Likely increase in demand
Community worker Family support worker Residential care officer Youth worker	Certificate III in Community Services	95	Likely increase in demand
	Diploma of Community Services	60	Likely increase in demand

In addition to the above listed VET qualifications, the following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Allied health for example, Bachelor of Occupational Therapy, Bachelor of Physiotherapy, Bachelor of Speech Pathology.
- Medicine, pharmacy and nursing for example, Doctor of Medicine, Bachelor of Nursing, Bachelor of Pharmacy.
- Early Childhood for example, Bachelor of Early Childhood Education.

Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the health care and community services industry. Table 23 provides an outline of key findings.

Table 23 | Opportunities for the health care and community services industry

Situation	Opportunity
The industry struggles to attract sufficient skilled workers	<p>Collaborate with secondary and tertiary education providers to promote pathways into tertiary education and training. For example:</p> <ul style="list-style-type: none"> • develop materials that articulate potential career pathways within and across the industry for example, primary to tertiary settings, similar to the Loddon Campaspe Health Sector Pathways Roadmap⁷³ • expand secondary school outreach programs • expand programs that enable students to earn income while studying (for example, the RUSON pilot program at Grampians Health).⁷⁴
Employers struggle to recruit people from diverse backgrounds, especially men, Aboriginal people and older people	<p>Actively recruit people from diverse backgrounds. For example:</p> <ul style="list-style-type: none"> • engage with Aboriginal people and local Aboriginal community health providers to promote careers in the industry • explore training pathways for non-school leavers including work placements for jobseekers • promote the pathway to male students, through programs such as those supported by the Workplace Gender Equality Agency.⁷⁵
Lack of local provision deters student participation	<p>Expand local training provision. For example, deliver high demand qualifications, such as Certificate IV in Disability and Certificate IV in Community Services, locally.</p>
Employee career progression is inhibited by a lack of mid-career support	<p>Foster skill development within the industry. For example:</p> <ul style="list-style-type: none"> • establish a Community of Practice or peer network for local entry-level workers • develop programs that create knowledge sharing in the region (for example, the By Five Maternal and Child Health Service Community of Practice group) • promote upskilling programs in management and leadership.
Existing courses are not fully aligned to the specific needs of industry	<p>Ensure training is relevant and practical. For example:</p> <ul style="list-style-type: none"> • provide adequate hands-on experience in disability support courses (Certificate III in Individual Support and Certificate IV in Disability) • pursue flexibility in funding and regulatory requirements to enable local training providers to streamline pathways into allied health and care roles • encourage industry and education providers to take a place-based approach to curriculum design.



‘Health care and community services is the largest employing industry in the Wimmera Southern Mallee, employing 20% of the region’s workforce.’

Mineral sands mining



Industry profile and outlook

Industry composition

The mining industry has a relatively small presence in the Wimmera Southern Mallee, accounting for just over 1% of economic gross value added (GVA). The industry has the potential for rapid growth, if a number of proposed mineral sands mining projects progress to construction. The industry could play a significant economic role in the region, given that established mining industries are a typically highly productive industry that create high paying jobs, and support a supply chain of small and medium sized businesses.⁷⁶

The region is home to 75% of Victoria's mineral sand deposits, with access to the Murray Basin mineral sands deposit, one of the world's largest mineral sands deposits.⁴ Most deposits are concentrated in the western and northern areas and predominately produce rutile, ilmenite, and zircon.⁷⁷ There are also a number of active quarries that produce a wide range of other materials including sand, limestone, scoria, tuff, basalt or bluestone and gypsum. Production is transported by road to the Wimmera Intermodal Freight Terminal and then by rail to Port of Portland, Geelong, or Melbourne to overseas markets.

Businesses in the Wimmera Southern Mallee have not previously extracted mineral sands at scale. Current projects, including the Avonbank Heavy Mineral Sands project and the Donald Mineral Sand project, have relatively small production.⁷⁸ However, employers reported that 4 major projects could imminently progress to the construction phase in the next 5 to 10 years.

Current demand and outlook

Mineral sands production is expected to be relatively steady in the next 3 years before increasing over the next 20 to 30 years, as projects move from the construction to operation phase. Drivers of growth include:

- increased global demand for rare earth elements contained in mineral sands to use in high technology and clean energy applications such as used in permanent magnets. These magnets are essential in the construction of wind turbines, electric vehicles and modern rechargeable batteries.⁴
- continued strong demand across the main applications in ceramics (zircon) and pigments (titanium dioxide).⁷⁹

The industry's ability to realise these growth opportunities over the next 3 to 5 years will depend on businesses' ability to secure the appropriate permits and approvals, social licence and workforce to operate.

The industry is also connected to the region's manufacturing, construction, and transport industries.





Workforce composition and outlook

Workforce composition

Mining is currently not a large employing industry in the region, accounting for 1% of the region's workforce.

Mining businesses tend to be owned or financed by large corporations, as mining is a capital-intensive industry. The few mining companies in the Wimmera Southern Mallee currently have a relatively small workforce, as each mine undertakes feasibility studies and permit and approval processes.

Common mining roles for operational mines include mining engineer, geologist, safety specialists, process operators, diesel fitters and trades, boilermakers and labourers. Other roles include project managers, earthmoving workers and truck drivers. Businesses also employ a variety of support

staff, including in planning, accounts, sales, marketing, and other related roles. The region's mining businesses currently employ a large proportion of management and senior staff to co-ordinate permit and approval processes.

Workforce outlook

Once mineral sands mining businesses acquire the appropriate approvals, the industry will require a large supply of workers to begin construction. Employers estimated that approximately 200 workers, including mechanical installation workers, earth moving workers and truck drivers, are required for the construction phases of a project, which typically last 12 to 18 months.

Table 24 shows key workforce indicators and estimated growth in the next 3 years. This provides an indicative estimate of workforce demand, based on taskforce estimates. Overall, the total jobs that need to be filled will be higher due to the number of existing vacancies.

Table 24 | Mineral sands mining: key labour market indicators and estimated growth 2022–2025

Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
1.1%	250	20 to 25%	160 to 200	10	170 to 210

Mineral sands mining projects are likely to be staffed by contract workforces due to the capacity limits of the region, however, employers emphasised the importance of creating employment opportunities for local people and integrating any workers from outside the region in the local community. A local workforce for ongoing maintenance and support is anticipated to be required in the longer-term.

Table 25 describes the major occupations in the mineral sands mining industry and their estimated growth over the next 3 years. This profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 25 describes only workers in ANZSCO occupations that are directly attributed to the mineral sands mining industry.

Table 25 | Mineral sands mining: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth* (2023–25) ⁸
Civil engineering draftspersons and technicians	0	80 to 90
Metal fitters and machinists	27	70 to 80
Earth moving plant operators	0	30 to 40
Truck drivers	0	30 to 40
Safety specialists	0	10 to 15
Other building and engineering technicians	95	15 to 20
Geologists and geophysicists	15	0 to 10
Other construction and mining labourers	6	0 to 5
Environmental scientists	5	0 to 5

*New worker estimates are based on 2 projects beginning construction in the next 3 years.

Education and training outlook

Employers require tertiary qualification for some specialised roles. There are 2 main entry pathways to the industry: accredited training through a trades apprenticeship or learning through a higher education provider:

- a certificate qualification, for example, Certificate III in Drilling Operation or Advanced Diploma in Process Technology, is required for some occupations in the industry.
- a higher education qualification, for example, Bachelor of Mining Engineering, Bachelor of Geophysics Science, Bachelor of Geology Science, is required for specific occupations in the industry, including geologist and mining engineers.

Employers reported a willingness to hire workers with no specific qualification or experience, instead seeking attributes including work ethic, willingness to work outdoors, adherence to requirements and capacity to meet the physical requirements of the role.

Given their limited presence in the region, employers did not comment on the quality of mining training. However, employers noted that the lack of local training providers is a challenge for the industry, as younger workers are not aware of mineral sands mining as a potential career pathway and are not able to access the training readily. As such, employers may need to mobilise a contract workforce from other areas, such as Bendigo and Ballarat, especially during the construction phase, to supplement the local workforce.

There are currently no mining related enrolments in the Wimmera Southern Mallee region. Demand for qualifications relevant to the industry are anticipated to increase as employers demand appropriately skilled workers in the next 3 years. The following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Geology for example, Bachelor of Geophysics Science, Bachelor of Geology Science.
- Engineering for example, Bachelor of Engineering, Bachelor of Mining Engineering.



Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the mineral sands mining industry. Table 26 provides an outline of key findings.

Table 26 | Opportunities for the mineral sands mining industry

Situation	Opportunity
<p>Young people are often not aware of the breadth of opportunities in this industry</p>	<p>Collaborate with secondary education providers to stimulate interest and improve pathway to entry-level positions. For example:</p> <ul style="list-style-type: none"> • increase focus on geology and mining in the secondary school science curriculum • engage with high school career counsellors to deliver the value proposition of working in mining and to dispel myths about what mining jobs look like or don't look like • promote cross-industry pre-apprenticeship programs, similar to a mining, construction and engineering program that has been introduced in Queensland⁸⁰ • promote experiential activities, such as mine site visits, study tours, excursions.
<p>Employers struggle to recruit older people with relevant skillsets instead of qualifications</p>	<p>Promote reskilling programs for older jobseekers through Learn Local to cover foundational skills such as computer literacy.</p>
<p>Lack of provision across regional Victoria deters student participation</p>	<p>Consider local or nearby training provision. For example:</p> <ul style="list-style-type: none"> • establish a mining training centre (for example, through education provider and industry collaboration) in Wimmera Southern Mallee or in surrounding regions • consider delivering qualifications, such as drilling operations, and skillsets that will be in demand locally <p>develop physical assets to support hands-on training (for example, Federation University's wind turbine training tower)⁸¹</p> <ul style="list-style-type: none"> • explore opportunities to link training delivery with the construction industry.
<p>Current qualifications and units do not fully meet industry needs</p>	<p>Expand on the range of qualifications and skillsets by developing:</p> <ul style="list-style-type: none"> • Industry Advisor Group-endorsed Prepare to Work in the Mining Industry. • Industry Advisor Group-endorsed Introduction to Mining Pathway. • consider introducing these qualification qualifications and skillsets into the Victorian funded course list.



Visitor economy

Industry profile and outlook

Industry composition

The visitor economy industry is the third largest economic contributor to the Wimmera Southern Mallee, accounting for 9% of gross value add (GVA) in the region.³

Key attractions in the region include nature-based outdoor adventures, arts and recreation sites and cultural activities, most of which are offered in Horsham and Northern Grampians.⁴

The industry is predominantly comprised of interconnected small and medium sized businesses. The region is home to over 700 visitor economy businesses, with 99% employing less than 20 staff. Retail and food and beverage services drive economic activity, and are inherently linked with accommodation, sports, arts and recreation attractions across the region. These sectors collectively offer the facilities and services required to attract visitors to the region and deliver a positive visitor experience.

Current demand and outlook

The region's visitor economy has endured sizeable disruption in the last 2 years due to the pandemic. Restrictions on international, inter-state and intra-state travel have hindered visitation to the region, in addition to curtailing the flow of seasonal workforce to support tourism activities.⁸² The Wimmera Southern Mallee Regional Economic Development Strategy notes that growth in the visitor economy can leverage the region's natural assets and Aboriginal heritage. Key drivers include:

- a range of agritourism and nature-based attractions poised to attract higher levels of domestic tourism post-pandemic, with visitors from Melbourne and interstate seeking to experience the natural beauty of regional Victoria.^{4, 83}

- investment in the Silo Art Trail, Australia's largest outdoor gallery, stretching 200 km across the region. The Trail was a landmark attraction for the region pre-pandemic, and has received funding from the Visitor Economy Recover and Reform Plan to support visitor attraction, engagement and experience.⁸⁴
- \$33 million of investment into the Grampians Peak Trail in the Grampians National Park to support the development of a unique 160 km natural and cultural hiking experience. The trail offers a range of walking activities, provides exposure to local Aboriginal culture and is expected to attract 34,000 walkers annually by 2025.⁸⁵
- arts and recreation attractions in the region, including Brambuk Cultural Centre in the Grampians National Park and Horsham Regional Art Gallery.^{4, 86}
- events in the region, including the Horsham Agricultural Show and the Stawell Gift.

These key drivers are set to attract tourists to the Wimmera Southern Mallee, creating positive flow-on benefits to accommodation, food, beverage, and recreation services in the region. However, key barriers must be overcome to achieve this growth, including:

- a considerable labour shortage across the industry, particularly for entry-level roles, has the potential to disrupt the quality and operations of local businesses and negatively impact visitor experience, for example through reduced operating hours and poor service experience.⁸⁷
- variability of tourism, with demand peaking on weekends and in school holiday periods but falling dramatically outside of these periods.
- insufficient digital infrastructure and telephone reception exists to support reliable internet connectivity and communication across the region,⁸⁸ which has the potential to inhibit visitor attraction and the ability of local businesses to integrate technological innovations into their operations.⁴

³ This profile defines the health care and community services industry as the Health Care and Social Assistance ANSZIC industry code and the visitor economy industry as the Retail Trade, Arts and Recreation Services and Accommodation and Food Services ANSZIC industry codes



Workforce composition and outlook

Workforce composition

The visitor economy is the third largest employing industry in the region, comprising 13.6% of the region's workforce. Employees tend to be transient and not employed on a full-time basis. The industry is supported by an older workforce, with 30% of the industry's workforce aged above 60 years.²⁴ Some younger employees work in entry-level visitor economy roles while undertaking education and training in another field, particularly in the hospitality and arts and recreation sectors.

The majority of roles are entry-level including sale assistants, waiters, kitchenhands and cleaners. Skilled roles include chefs, cooks and bar attendants. This workforce is also supported by a professional workforce including retail, café and restaurant managers, accountants and marketing staff.

Workforce outlook

With relatively high growth projected, the visitor economy industry will require a large additional supply of workers to fill existing vacancies and meet demand growth.

Table 27 shows key workforce indicators and estimated growth in the next 3 years. This provides an indicative estimate of workforce demand, based on taskforce estimates. Overall, the total jobs that need to be filled will be higher due to the number of existing vacancies.

Table 27 | Visitor economy: key workforce indicators and estimated growth 2022–2025

Industry	Share of region workforce ⁷	Current workers 2022 ⁷	Forecast workforce growth (CAGR) ⁸	Forecast workforce growth (people) ⁸	Estimated retirements ⁹	Total workers required
Arts and recreation services	1.1%	250	3 to 5%	30 to 50	20	50 to 70
Accommodation and food services	4.7%	1,050	3 to 5%	120 to 200	60	180 to 260
Retail trade	7.8%	1,750	3 to 5%	230 to 400	110	340 to 510
Visitor economy total	13.6%	3,050	3 to 5%	380 to 640	190	560 to 830

Employers reported facing significant workforce challenges, including:

- a long-standing, industry-wide labour shortage that predates the pandemic has curtailed business operations and created a higher workload for existing employees. Pandemic induced restrictions on interstate and international migration has exacerbated this shortage. Government investment and innovative solutions have been announced in response to this problem, with \$6.7 million announced to support 5 days of hospitality training for jobseekers and provide small and medium businesses access to this workforce.⁸⁹
- a poor perception of visitor economy jobs among potential workers and their families, with jobs seen as temporary while the worker pursues a 'real career'. Employers reported a desire to promote career opportunities and pathways to aid workforce attraction.

- Regional-specific challenges, including geographic distance, inaccessibility of housing and insufficient public transport, impede the ability of businesses to attract workers who typically have lower incomes and poorer access to private transport.⁸⁵

Table 28 describes the major occupations in the visitor economy industry and their estimated growth over the next 3 years. This Profile defines occupations using ANZSCO classifications and associates a proportion of each occupation to an industry, as defined by ANZSIC classifications. While employers often rely on a broader range of occupations across industries, Table 28 describes only workers in ANZSCO occupations that are directly attributed to the visitor economy industry.

Table 28 | Visitor economy: top occupations by forecast demand

Top occupations (based on ANZSCO classifications)	Current workers (2022) ⁷	Forecast growth (2023–25) ⁸
Sales assistants (general)	608	90 to 130
Retail managers	293	40 to 60
Checkout operators and office cashiers	166	30 to 50
Shelf fillers	127	20 to 20
Kitchenhands	115	10 to 20
Waiters	172	10 to 20
Commercial cleaners	37	10 to 20
Hotel and motel and hospitality managers	76	10 to 20
Bar attendants and baristas	68	10 to 20
Chefs	128	10 to 20
Greenkeepers	5	0 to 5
Fitness instructors	7	0 to 5





Education and training outlook

Tertiary training is required for some high-skilled roles in the visitor economy. Workers require specific qualifications for specialist roles, such as a Certificate in Commercial Cookery for chefs and cooks and Responsible Service of Alcohol training for bar attendants. Professional and management roles may be filled by a worker with a degree-level qualification in management, accounting or marketing.

Employers predominantly value intangible skills instead of formal qualifications for entry-level qualifications. Employers seek workers with skills that support teamwork, innovation and communication, and desire a positive attitude and the willingness to work visitor economy hours. Lower-skilled roles including wait staff, cleaners and sales assistants typically require no formal training, with these workers typically undergoing short, in-house training upon beginning a role.

Employers reported the desire for greater access and availability to education and training opportunities. Employers reported that the lack of a Bachelor-level degree in tourism in the region hinders the development of tour guides and management roles and contributes to the perception of the industry as lacking in professional opportunities. Employers desired a greater level of work-readiness among school leavers, citing a lack of customer service, professional behaviour and time management skills from workers in entry-level positions.

Employers expressed dissatisfaction with the quality of training for chefs and cooks. The Certificate III/IV in Commercial Cookery is perceived by employers as outdated relative to industry needs and reports high levels of non-completions.⁸³

Table 29 below outlines the key VET qualifications for workers in the visitor economy industry, the number of enrolments in the region and the anticipated training requirement in the next 3 years. Anticipated training requirement is based on each occupation's forecast growth, state-wide training trends and input from industry representatives.

Table 29 | Visitor economy: key qualifications and training requirements

Occupation groups (ANZSCO)	Top qualifications	2020 enrolments ⁴⁸	Anticipated training requirement
Retail workers	Certificate II in Salon Assistant	50	Consistent demand
	Certificate III in Retail	60	Consistent demand
	Certificate II in Retail Services	5	Consistent demand
Kitchenhands and cooks	Certificate II in Kitchen Operations	45	Likely increase in demand
	Certificate III in Commercial Cookery	15	Likely increase in demand
	Certificate IV in Commercial Cookery	10	Likely increase in demand
Bar Attendants and Baristas Café and Restaurant Managers	Certificate III in Hospitality	35	Likely increase in demand
	Certificate IV in Hospitality	5	Likely increase in demand
Arts, sport and recreation workers	Certificate III in Sport and Recreation	70	Likely increase in demand

In addition to the above listed VET qualifications, the following higher education qualifications are likely to be in increased demand, based on projected workforce demand.

- Management for example, Bachelor of Management, Bachelor of Commerce.
- Tourism, for example, Bachelor of Tourism, Bachelor of Tourism Management.

Opportunities to improve education and training

Industry leaders and employers in the region have identified specific opportunities for the education and training system to support the visitor economy industry. Table 30 provides an outline of key findings.

Table 30 | Opportunities for the visitor economy industry

Situation	Opportunity
<p>The industry struggles to recruit workers due to a perceived lack of career opportunities</p>	<p>Develop and articulate career opportunities in the industry. For example:</p> <ul style="list-style-type: none"> • improve access to apprenticeships and traineeships programs for in demand occupations like chefs and cooks, for example, Head Start and the Regional and Specialist Training Fund (RSTF) • engage with high school career counsellors to deliver the value proposition of working in visitor economy and to dispel myths about what visitor economy jobs look like or don't look like • promote professional visitor economy careers to students pursuing further education in other fields (for example, commerce, marketing).
<p>Lack of local provision deters student participation</p>	<p>Expand local training provision. For example:</p> <ul style="list-style-type: none"> • consider delivering high demand qualifications locally, such as Certificate III in Commercial Cookery and Certificates III in Hospitality • utilise existing facilities to support delivery of high demand qualifications • roll out the Apprenticeship Support Network's paid hospitality training program for jobseekers in the region and to attract workers to the region • develop training to support upskilling for volunteers and hobby business owners in the industry.
<p>Industry demands skillsets that are not provided by the education system</p>	<p>Introduce specialist tourism courses with flexible delivery models. For example:</p> <ul style="list-style-type: none"> • build on Federation University's work to introduce a Bachelors degree for visitor economy on tourism and hospitality management, with Wimmera as a satellite campus • introduce a Certificate III in Guiding, with Indigenous culture, tour guiding and cultural appreciation components.
<p>Existing qualifications are not fully aligned to industry needs</p>	<p>Facilitate skill development for entry-level workers. For example:</p> <ul style="list-style-type: none"> • develop a work readiness program (1 to 2 days) for secondary school students • provide financial support to deliver short visitor economy boot camps for secondary school students to develop key skills (for example, coffee making, Responsible Service of Alcohol) • support regional tourism boards through funding to improve the quality of internal training • promote reskilling programs for older jobseekers through the Learn Local to cover foundational skills (for example, Workforce Hospitality Pathway Program).⁹⁰



‘With relatively high growth projected, the visitor economy industry will require a large additional supply of workers to fill existing vacancies and meet demand growth.’



Appendix B: Data sources



Employment estimates

Source: Victorian Skills Authority (VSA), Nous (2022), modelling of NSC (2022) Employment Estimates.

This modelling estimates employment by ANZSIC3, ANZSCO4 and SA2 (usual place of residence) at quarterly periods that match the historical Labour Force Survey.

Census 2016 data by ANZSIC3, ANZSCO4 and SA2 is used as the base data. Iterative proportional fitting has been used to adjust the 2016 Census using the marginal tools of:

- total employment (that is, without any industry or occupation dimension) by SA2 from the Small Area Labour Market (SALM) estimates
- state by ANZSIC3 from the Labour Force Survey
- state by ANZSCO4 from the Labour Force Survey

The net effect is that the broad interaction pattern of industry and occupation from the time of the census is unchanged; growth in total employment at the regional level is matched from the SALM estimates; growth in particular industries and occupations in the state is matched from the Labour Force Survey.

Where an SA2 spans multiple partnership regions estimates have been apportioned on geographic area.

Detail on sources

Table 31 provides the sources used to input to the Nous (2022) modelling.

Table 31 | Data sources used to model SA2 employment estimates

Insight	Data source
Census data 2016 and 2021 (subject to released data)	Census data on employment by ANZSIC3, ANZSCO4 and SA2 usual place of residence.
Total employment by SA2	SA2 smoothed employment published by the National Skills Commission, calculated from the 'Smoothed SA2 labour force' sheet and 'Smoothed SA2 unemployment' sheet of the 'SALM smoothed SA2 Datafiles'.
State x ANZSIC3	ABS Quarterly Detail cube published by the ABS, EQ06. full-time and part-time are added together.
State x ANZSCO4	ABS Quarterly Detail cube published by the ABS, EQ08. This cube does not distinguish between full-time and part-time

While the SA2 seed data is smoothed, the weighting is to marginal totals from ABS Quarterly Detail cubes. The end result is the historical employment estimates by SA2 are not seasonally adjusted but best estimates of the employment in the industry or occupation in the reference week for that quarter of the Labour Force Survey.

Employment forecasts

Source: VSA, Nous (2022), modelling of NSC (2022) Employment Projections.

This modelling creates sets of forecasts by ANZSIC3, ANZSCO6, BGTOCC (Burning Glass Technologies Occupation Classification) and state that match published Australian Government forecasts. A separate exercise is conducted for each forecast publication year.

Burning Glass data by ANZSIC3 x ANZSCO6 by BGTOCC is used as the base data. This is scaled to match ANZSIC3 x ANZSCO3 x state totals for 2016 from the 2016 Census. These values are then scaled in turn with iterative proportional fitting to match National Skills Commission Labour Market Insights forecasts of employment by ANZSCO4 for Australia and ANZSIC1 x state.

The ANZSIC3 by ANZSCO4 forecasts are then allocated to LGA. This approach is:

- base data comes from the 2016 Census as ANZSIC3 and ANZSCO4.
- base values are scaled to total employment area from the Small Area Labour Market Estimates and to the ANZSIC3 and ANZSCO4 forecast totals, creating 2 data sets for each projection year: employment area by ANZSIC3 and employment area by ANZSCO4.
- a new set of base data from the 2016 Census – employment by place of residence by ANZSIC3 and ANZSCO4 – is now scaled to match the 2 data sets.

Detail on sources

Table 32 provides the sources used to input to the Nous (2022) modelling.

Table 32 | Data sources used to model state and LGA employment forecasts

Insight	Data source
Census data 2016 and 2021 (subject to released data)	Census data on employment by ANZSIC3 and ANZSCO3. Census data on employment by place of residence by ANZSIC3 and ANZSCO4.
Employment by occupation forecast	Labour Market Insights employment projections,labourmarketinsights.gov.au/our-research/employment-projections/
Employment by industry forecast	Labour Market Insights employment projections,labourmarketinsights.gov.au/our-research/employment-projections/#5 . The given industry forecast period is often not available until some months after the occupation forecasts. As at May 2022 there were no 2021 to 2026 ANZSIC1 by state forecasts available. The 2020 to 2025 ANZSIC1 by state forecasts were used and scaled up to match the Australian total employment numbers in the ANZSCO4 forecasts.
Total employment by SA2	SA2 smoothed employment published by the National Skills Commission, calculated from the 'Smoothed SA2 labour force' sheet and 'Smoothed SA2 unemployment' sheet of the 'SALM smoothed SA2 Datafiles'.



Employment forecasts are a best estimate of industry and occupation growth by region. They provide an indication of change but do not, and cannot, tell the full story of the region's economy. Extensive stakeholder consultation has been conducted to supplement the quantitative approach. A taskforce comprised of industry leaders and education and training institutions from across the region have provided and approved adjusted forecasts that reflect the circumstances in the region.

Retirement estimates

Source: VSA, DAE and Nous (2022), Retirement projections 2022–2025.

Retirements are estimated by applying occupation-specific retirement rates to the employment forecasts outline above.

Using the Australian Census Longitudinal Dataset, an estimate of the size of the labour force aged 50 and over in 2016 was taken and compared to the size of the labour force aged 45 and over in 2011. After adjusting for migration, the gap is assumed to be a measure of retirement across the 5 years between 2011 and 2016. The relative age structures of occupations in the Census 2011 were then used to estimate retirements at the detailed occupation level (ANZSCO4).

The outputs were used to estimate an occupation-specific retirement rate, calculated as:

Retirement rate = retirements between periods t and t+1 / employment at t

The retirement rates to employment forecasts outlined above to estimate the number of retirements between 2021 and 2025 at the region (Regional Partnerships), industry (ANZSIC1) and occupation (ANZSCO4) level.





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