MURRAYLANDS GROWTH SURVEY 2003

A projection which quantifies and profiles the growth of the Murraylands region to 2006

for the

MURRAYLANDS REGIONAL DEVELOPMENT BOARD

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Headline Summary

Survey Description

This Survey was instigated by the Murraylands Regional Development Board (MRDB) as an essential planning tool in the development of strategies to overcome an increasing shortage of workforce accommodation. It will also provide valuable information about other issues (such as employment, education and training) which must be addressed if the growth of the Murraylands is to continue without impediment. The undertaking was made possible by funding from the SA Office of Regional Affairs.

In order to predict growth, a sample of organisations was contacted using a detailed questionnaire. Respondents were asked to specify variations in staffing anticipated for the coming three years. The sample was carefully constructed in order to ensure that all areas of the Murraylands and all industry sectors were adequately represented. The survey form also included a range of questions to identify workforce accommodation and related issues. Raw data was adjusted using ABS and ATO indicators (see section on methodology) in order to "scale up" the findings to represent the whole of the Murraylands with minimal distortion. Where indicators appeared less than trustworthy, the survey methodology ensured that adjustment factors erred on the side of conservatism.

Survey Projections

The survey shows that private and public organisations expect that given normal conditions, the Murraylands workforce will increase by at least 3,184 new positions during the coming three calendar years. About half of these positions (1,637) will be full time. Respondents were asked to make predictions for average, good and poor years. It is notable that even in the case of three bad years in a row, significant growth was predicted (849 new positions). The prospect of three good years increased the prediction to 4,737. Nearly two thirds of this growth (2,102 positions) is centred in the local government area (LGA) of the Rural City of Murray Bridge. The other four LGAs of the Region also anticipate significant growth.

The retail, manufacturing (including value-adding) and agriculture industry sectors are those which anticipate the most growth, and the transport / storage sector also expects a substantial increase. Growth within the agricultural sector will be driven mainly by diversification and specialised crops, while traditional farming will remain more or less static. Thus the increases expected in the Southern Mallee area mostly reflect recent developments in potatoes and olives, and in the Karoonda East Murray area, virtually all the expected growth derives from a single mining enterprise.

Workforce Accommodation Issues and other threats to growth

The lack of adequate accommodation to house our growing workforce is generally recognised as a serious problem by respondents to this survey. Some attempts have been made to address it, particularly in the Mallee, however the magnitude of the problem is highlighted by data from this survey which show alarming numbers of expected positions in localities where little or no vacant accommodation exists. If not addressed, this problem has the potential to stall the anticipated growth.

Similarly, respondents reveal significant difficulties in accessing staff in particular occupations and with particular skills, qualifications and training. These problems are exacerbated by distance in the extremities of the Region. Other issues such as lack of child care, poor motivation, and difficulties associated with isolation were also reported by many organisations.

This survey will have fulfilled its purpose if it provides the incentive for Murraylands communities to insist on overcoming these problems so that the anticipated growth will become a reality.

Background

Growth Opportunities Survey 1998

During the late 'nineties, the MRDB and its affiliated body, the Murraylands Employment, Education and Training Network (MEETN) became concerned that the business growth which the Murraylands was starting to experience could be stalled if sufficient staff were not available locally to fill the jobs which were being created. At that time there were about 1,500 unemployed people in the Murraylands, - significantly less than the number of jobs that appeared likely to be generated by incoming businesses.

With the help of funding from the federal department then called Employment, Education, Training and Youth Affairs, Kerry Medlow was engaged to undertake a survey to predict employment growth in the Murraylands for a three year period, identify barriers that might impede that growth and develop strategies to overcome them. The resulting Growth Opportunities Survey of 1998 predicted a minimum of 2,000 new jobs by 2002. At the time, this finding was greeted in some quarters with incredulity. In hindsight however, we can see that the prediction was in fact quite conservative. Considerably more than 2,000 jobs have been created by new employers (such as the Big W warehouse at Monarto) moving into the region, the development of resources within the region (such as potato growing at Parilla) and the "spin-off" effect, producing growth in the service sectors.

The barriers to growth identified by the Growth Opportunities project included the shortage of accommodation for the incoming workforce and a number of employment, education and training problems.

The Regional Workforce Accommodation Solutions Study (Hassell Report)

In 2000, the former (SA) Office of Regional Development became aware of the evident lack of housing to accommodate expanding workforces in various regional areas. After some preliminary deliberations, the consultancy Hassell was engaged to coordinate a project on regional workforce accommodation, including a report detailing the problems and potential solutions, with particular attention to the South East and Murraylands / Murray Mallee areas of South Australia.

The Regional Workforce Accommodation Solutions Study was completed in March 2000, following much local consultation. The report identified the extent of the problems concerned and recommended a variety of strategies which could be employed to solve them. Many of these made use of possible funding and assistance measures which could be applied through Federal, State and Local Governments and their agencies.

In the event, the most useful recommendation of the report was "In partnership with Regional Development Boards conduct a regular forum with State Government agencies, the Real Estate institute, employers and accommodation providers, with the objectives of (i) facilitating local solutions, and (ii) to maintain a workforce accommodation database which would inform Federal and State Government decision making." With the assistance of the Office of Regional Affairs, this recommendation led to the formation of the Murraylands Workforce Accommodation Network, which has proposed a number of strategies (mostly with a business and community emphasis) for local application, following an assessment of their merits in the light of the findings of this survey.

The Murray Mallee Communities

The Murray Mallee Strategic Task Force actively addressed the issues raised by the Accommodation Solutions Study, urged on by the pressing accommodation problems experienced by many employers in the Mallee. A sub-group of the Task Force was formed and a broad range of local solutions was canvassed, several of which are being put to the test. Examples include youth housing units for Lameroo, Pinnaroo and Karoonda, and accommodation for seasonal workers to be established at Parilla as a community enterprise.

The experiences of the Mallee have also been a major source of the strategic concepts which have been discussed in the Accommodation Network with the intention of being applied throughout the region.

The Murraylands Workforce Accommodation Project

Following a grant of funding from the Office of Regional Affairs, the MRDB engaged Bill Clifford to bring together a network of stakeholders to propose strategies which could be applied locally to solve the growing problem of workforce accommodation. The resulting network , consisted of over 90 members representing finance, real estate, building, community, local industry / business and state and local government. It held two workshops at Tailem Bend in November and December 2002, in addition to exchange of ideas and information via email, phone and fax.

By the conclusion of the second workshop, network members had formulated an extensive list of practical strategies and agreed that a detailed and searching employment forecast for the Region was a pre-requisite for further action. Thus stage two of the Workforce Accommodation Project should consist of the production of such a forecast and the commissioning and resourcing of strategic solutions based on its findings.

The Office of Regional Affairs was again approached, and funding was granted to conduct this survey.

Methodology

Predictive Principles

Attempting to predict the future sounds like a risky undertaking. However, if the task is approached with a thorough knowledge of relevant past trends and present circumstances, and if expert opinion is sought and quantified in as objective a manner as possible, the results should give a reasonable indication of the most likely future. The Murraylands Growth Opportunities Survey of 1999 is a good example of a well constructed predictive survey which accurately identified future trends.

As was the case with the Growth Opportunities Survey, the present survey bases its predictions upon the employment growth expected by Murraylands employers within their own organisations over the coming three years. This source constitutes the best informed body of opinion concerning future growth. Employers' predictions draw upon intimate knowledge of their industry, their business environment and their own operations. Survey findings based upon them are only likely to be seriously upset by an unforeseen major disaster.

In recognition of unpredictable factors such as variations in export markets or the seasons, the survey frequently used questions which allowed respondents the freedom to give broad ranging responses. Whenever the resulting data admitted more than one possible interpretation, this report has erred on the side of caution and conservatism.

The Scope of the Survey

The growth survey makes predictions about the growth of the Murraylands through the coming three years. In arriving at these predictions, it also quantifies growth in the specific industries and sub-regional locations in which the growth will occur.

The report interprets data separately for each of the five local government areas of the region. Where specific localities within those areas show significant growth or shrinkage, these are examined individually.

Industry-specific data were grouped into the 22 major Australia / New Zealand Standard Industry Classification (ANZSIC) categories. Some of these categories are minimally represented in the Murraylands, and were amalgamated. These were: Electricity, Gas and Water Supply with Manufacturing, Wholesale with Transport and Storage, Finance and Insurance with Property and Business Services, and Communication with Cultural, Recreational, Personal and other services. Education and Mining, although only represented by a small number of organisations, had particular significance, and were therefore treated separately, but not represented separately in all tables.

The survey also examines all the barriers to growth experienced by Murraylands employers, and focuses specifically on the issues of workforce accommodation, and employment, education and training.

The Survey Instrument

When planning for the Growth Survey commenced, the Board was also committed to two other surveys, one covering business development requirements, and the other covering specific education and training needs. In order to minimise the burden on businesses, the three surveys were incorporated in one questionnaire which contained a mix of multiple choice and free ranging questions. This resulted in a nine page document with three sections covering all the surveys. A shorter version containing only growth-related questions was used for government organisations. While the growth component is mostly confined to one section of the questionnaire, the Growth Survey has benefited from the ability to draw upon the data relating to business requirements and training needs required by the other surveys.

Sample Selection

The survey questionnaire was mailed to 474 organisations in the region. The region's local government administrations were also approached in order to elicit data in confidence relating to organisations which were expected to set up or expand within their areas over the coming three years. Many respondents were contacted by phone or in person by the Board's officers and Honorary Business Advisors to gain further information. The resulting data base represents 205 organisations.

The Murraylands possesses about 4,000 businesses, and as with many rural areas, the great majority of them are small. Less than ten of our organisations employ more than 100 people, and less than 60 employ more than 20 people. Experience shows that larger employers have a much greater impact on both growth and shrinkage than do smaller employers. This factor has a significant implication for forecasting methodology. A truly random sample would have to be very large indeed to be sure of capturing a representative proportion of larger employers, and of isolating the contributions of the smaller and more volatile industry sectors. In view of this consideration, organisations of significant size (employing in excess of 20 people full time or their equivalent part time) and known growth potential were all included, and comprised just over one quarter of the sample (58). The remainder of the sample was drawn from each of the region's local government areas in such a way as to ensure that all localities and the industries they contain were fairly represented.

Data Interpretation

As expected, larger organisations predicted much more growth than smaller organisations. The 58 selected respondents anticipated 1,053 new jobs, while the remaining 147 respondents (mostly small businesses) only expected 189. With this in mind, the selected respondents were treated separately and the findings from their data were included in the final figures only after adjusting the data from the remainder of the sample to ensure that it fairly represented the Murraylands as a whole.

In order to adjust the figures from the 147 smaller organisations, two processes were undertaken.

Firstly, the data was divided into 60 segments representing industry categories in each of the region's five local government areas. Figures from each segment were then "scaled up" using adjustment factors to bring them in line with the estimated number of organisations in their area and industry category. Australian Tax Office (ATO) figures (Single Location Business Entities by Postcode by Industry Division, 30 June 2001) were used in forming the estimates. It should be noted that these figures are based on registered ABNs, and do not include government bodies, not for profit organisations or businesses which did not state their industry type. The ATO figures show a total of 4,483 businesses in the Murraylands, but 360 of these are not listed by industry. Nonetheless, this survey has used these figures, not only because they are the only available figures which give a fair indication of the comparative sizes of industry groupings within small areas, but also to ensure that the principal of conservatism is applied fully and the accusation of enthusiastic exaggeration is demonstrably avoided. In practice, within each industry/LGA segment, the number of businesses (estimated by the ATO figures) was divided by the number of respondents, and the resulting figure was used as the factor by which their data were multiplied.

The second process was to examine the results of the first process by checking the estimated numbers of businesses against other available data and in the light of local knowledge, - and then introducing further adjustments where the method described above produced distorted findings. These adjustments were of two kinds:

1. The ANZSIC industry category of Agriculture contains not only cropping and grazing, but also services to agriculture, and the whole range of primary production with the exception of mining. 51.9% of Murraylands businesses fall within the category of Agriculture (ATO figures 2001). Most of these are traditional farms, which are intrinsically stable in respect to potential growth or shrinkage. However, our sample included within the same category several businesses in more volatile areas such as olive growing and irrigated potato production. To adjust their anticipated growth using the agriculture adjustment factor would therefore unjustifiably inflate the prediction of growth for agriculture and farms. To rectify this distortion, all agricultural organisations which were not traditional farms were separated out and became part of the 58 selected respondents. Their data are therefore included in the final figures, but without adjustment.

2. The numbers of businesses suggested by the ATO's figures for certain industry categories do not fairly represent the actual number of practising businesses. For example; according to the ATO figures, the region possesses 359 businesses in the Construction Industry. This figure is surprisingly high and is only exceeded by Agriculture (2,111) and Retail (359). On enquiry, it becomes obvious that this figure is high because it contains all those workers in the building industry who require ABNs in order to function as sub-contractors, while to all intents and purposes working as employees. Survey respondents in this category were mostly organisations, - themselves employing sub-contractors. In order to avoid inflating the results, the ATO figures were abandoned for this category, and the number of building / construction industry entries in Telstra Yellow Pages used instead. The same method was also used for areas such as Transport, Wholesale, Business and Financial Services, and Government Organisations. Once again, it must be stressed that this method errs on the side of conservatism. After applying it, the ATO's estimate of 4,483 businesses in the Murraylands was reduced to 3,624.

Multi-Scenario Forecasting

Respondents were asked to predict the number of new staff they expect to employ in 2004, 2005 and 2006 for three different scenarios:

1. if the year is about average,
2. if the year is significantly worse than average,
3. if the year is significantly better than average.

Details of organisations intending to set up in the Murraylands reported in confidence by local governments were treated in a similar manner. The resulting growth expectations were factored into the three scenarios taking into account the predicted likelihood of their arrival eventuating. Where doubt existed, the principle of conservatism was employed.

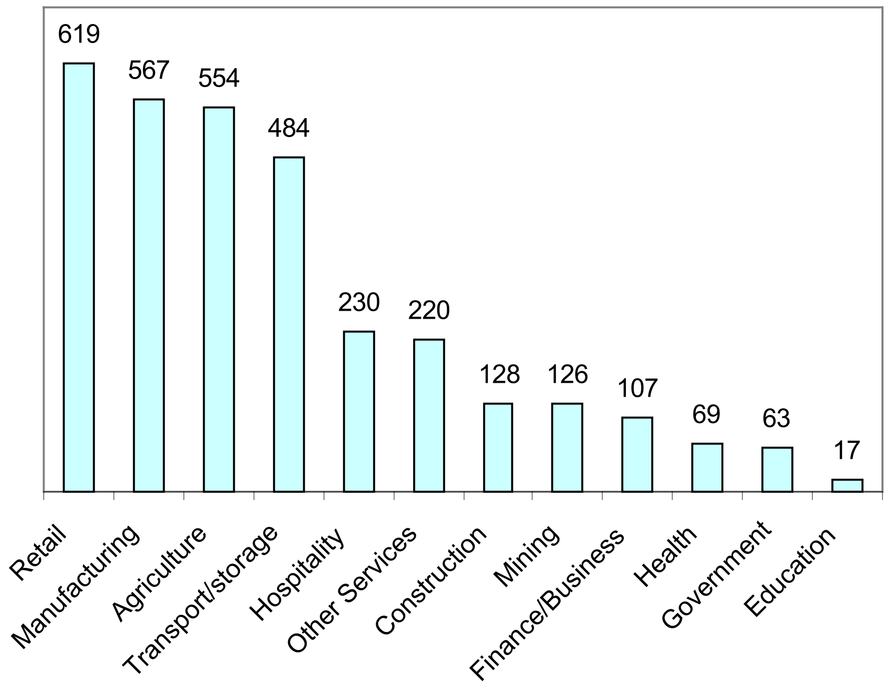
Growth Profile by Geographic Locations

The Murraylands Region

As mentioned in the headline Summary, an increase of 3,184 new positions is anticipated for the Murraylands during the coming three calendar years, comprising 1,637 full time and 1,547 part time positions. Three consecutive bad years may reduce this prediction to 849, but three good years could increase it to 4,737. While two thirds of this growth will centre on the local government area of the Rural City of Murray Bridge, significant growth is also predicted for all the other areas of the region. Almost a third (33%) of these positions will be with larger employers, including organisations intending to set up operations during the survey period.

Retail is expecting the largest share of the growth with 619 positions across the region, and this is followed by the Manufacturing Industry (567) which includes food processing and most value-adding operations. The Agriculture Industry category anticipates 554 positions, however these mostly reflect part time positions in specialised areas such as irrigated potato and olive production and mushroom farming Traditional farming (cropping and grazing) is likely to stay static, or even undergo a slight decline in employment. Transport and Storage also expect a sizeable expansion (484). Personal, Recreational, Business and Cultural Services and Hospitality follow, and the Mining Industry is expected to establish a significant presence in the Karoonda East Murray area.

Table 1 ~ Positions by Industry ~ Region

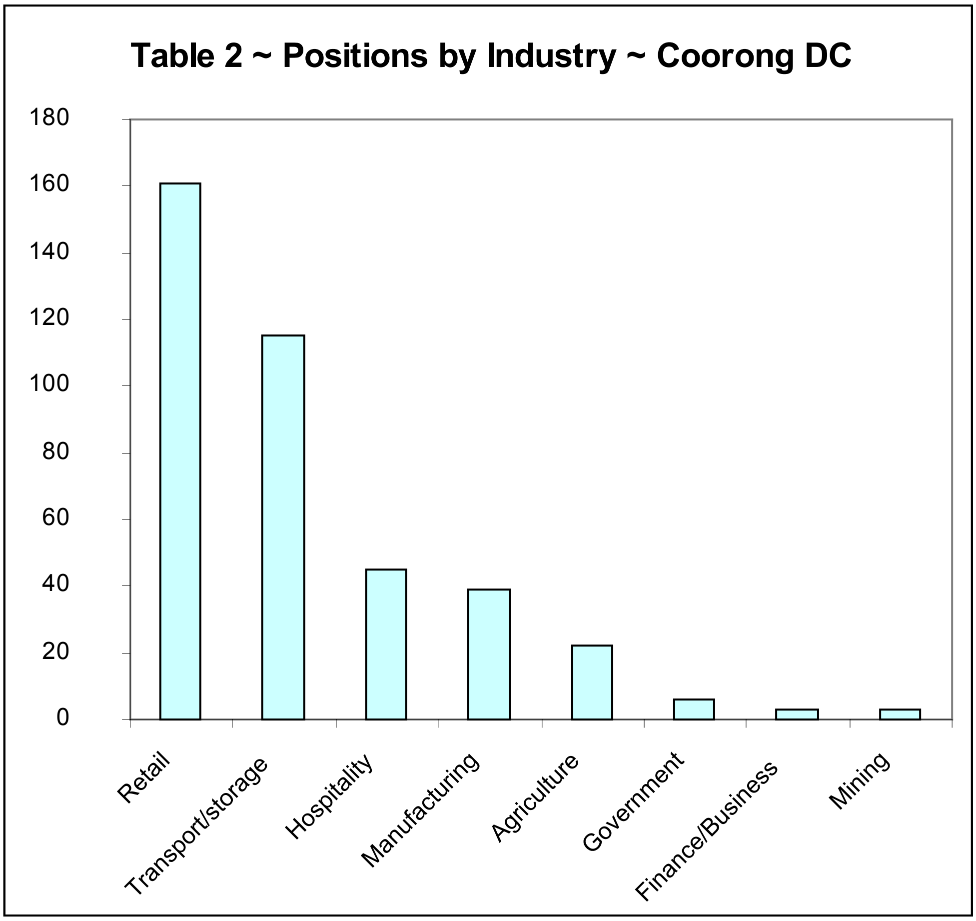


The proportional distribution of these positions by industry follows different patterns in most areas of the region as described below.

Coorong District Council

The Coorong District Council area may expect to acquire 394 new positions by the end of 2006. 188 of these will be full time, and 206 part time. Continuous good conditions during the survey period may boost this expectation to 431 positions, but bad conditions may bring about a negative growth rate, resulting in the loss of up to 80 positions. It is worth noting that this is the only area in the region in which shrinkage is foreseen as a possible future, - a factor which may be causally linked to the small proportion of larger employers in this region. Only 9% of the new positions will be with larger employers, compared with a regional average of 32%.

The distribution of growth by industry is mostly in keeping with the regional pattern, with the exception that the likely expansion of tourism in this area is reflected in the Hospitality industry which expects more positions (45) than Manufacturing Industry (39). However it should be understood that the number of respondents representing particular industry sectors within the region's LGAs (with the possible exception of Murray Bridge) are too small to allow for more than a rather tentative prediction of their expected growth.



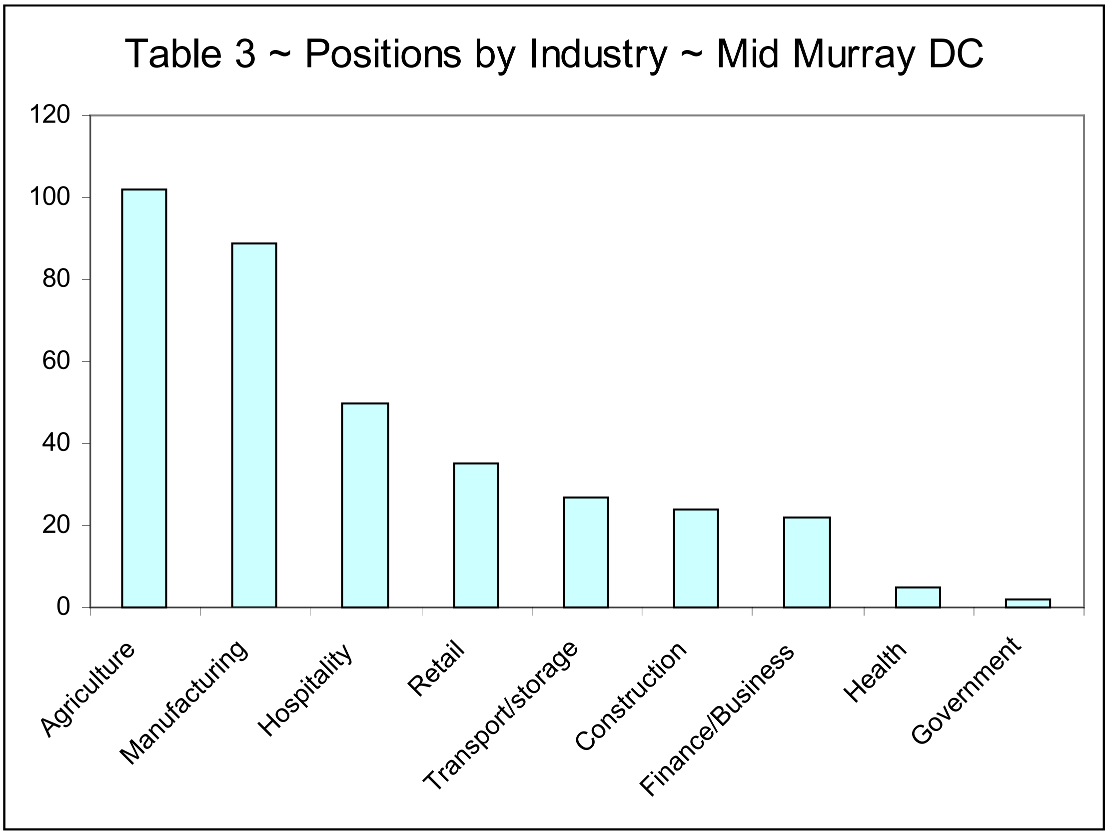
Karoonda East Murray Council

Nearly all of the growth expected in the Karoonda East Murray LGA (126 positions) will be generated by a single mining employer. No other industry sector gave indications of any significant growth.

Mid Murray District Council

The Mid Murray LGA may expect 356 new positions by the end of 2006. 141 of these will be full time, and 215 part time. Three good years could increase the number of new positions to 516, but bad years could limit growth to 95.

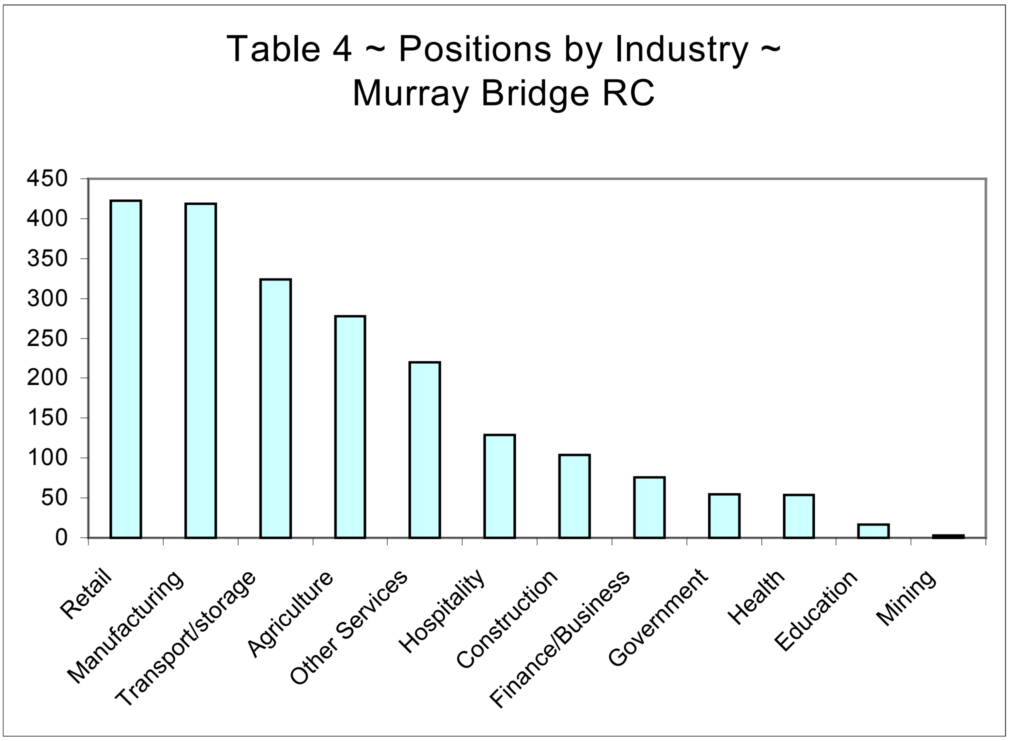
The new positions will be distributed mostly amongst small to medium sized enterprises. No large businesses are known to be planning to set up in this sub-region. The moderate growth in the agricultural category represents mostly specialised production along the Murray and animal management expansions taking place in the North of the LGA. Manufacturing industry growth will occur in existing engineering organisations as well as value-adding operations and businesses related to hospitality in areas such as the construction and repair of houseboats. In the table below, the transport and storage sector also includes wholesale and marketing organisations.



The Rural City of Murray Bridge

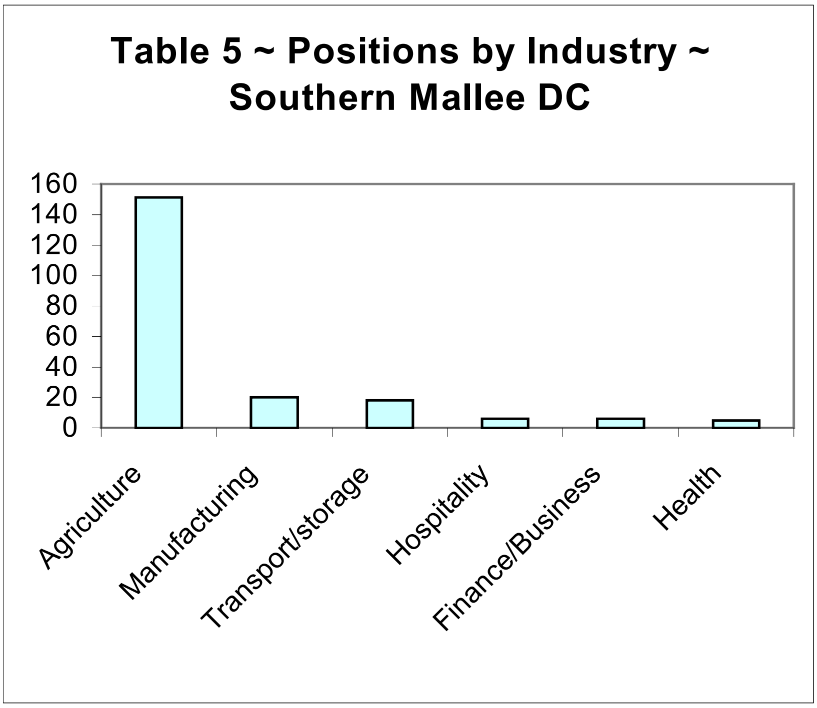
Given average conditions during the survey period, Murray Bridge and its local government area will grow by 2,102 new positions. 1,138 of these will be full time, and 964 part time. Given good conditions, as many as 3,447 positions may be expected, but bad conditions will reduce anticipated positions to 633.

The Rural City follows the regional pattern of growth distribution closely, with the exception that Agriculture (278 positions) follows the Retail, Manufacturing, and Transport/Storage industries, which between them account for more than half of the growth (423, 419 and 324 positions respectively). A significant number of the anticipated positions (336) will be with in-coming and young growing industries located in the Monarto / Callington area. Nearly all of the remainder will be in or very close to Murray Bridge itself.



Southern Mallee District Council

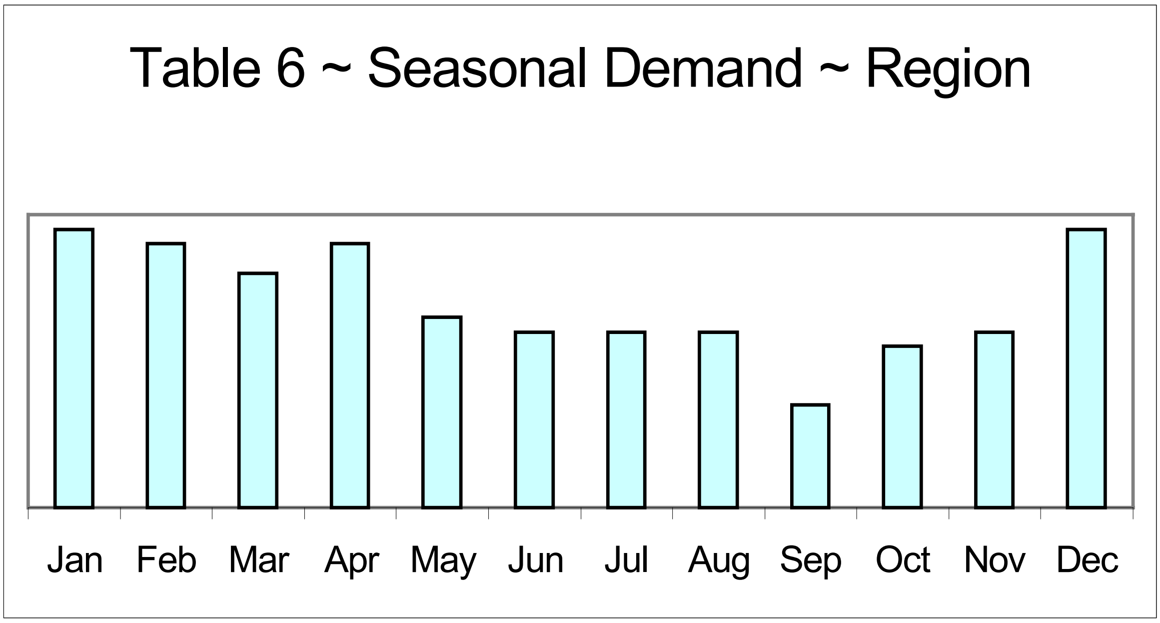
The Southern Mallee LGA may expect 206 new positions by the end of 2006. 49 of these will be full time, and 157 part time. Three good years could increase the number of new positions to 256, but bad years could limit growth to 113. This stability with respect to the seasons reflects the fact that a high proportion of the expected positions are in developing potato and olive enterprises, mostly around Parilla, which rely upon irrigation. In comparison, other industry sectors expect very few new positions (as seen in the following table) and those that are expected will be mostly a spin-off from the agricultural growth.



Seasonal Positions

Respondents who indicated that they expected to put on more staff over the coming three years were also asked if any of the new positions will be seasonal. Of the 123 who addressed this question, 37 (30%) responded positively. This proportion was echoed in most of the Region's LGAs, with the exception of Murray Bridge (17%) and Mid Murray (44%).

Most of the expected seasonal positions will occur in the agricultural sector (30%) and the value-adding elements of the manufacturing sector (22%). The remainder are mostly distributed through the retail, hospitality and transport / storage sectors. The spread of seasonal demand through the year is reflected in the following table.



The survey identified a wide range of occupations in seasonal demand. They are listed in Table 7. The numbers in brackets indicate the number of respondents who expect to employ people in these occupations.

Table 7

Seasonal demand, - occupations

Process workers, packers, shed hands etc (9)
Farm hands, - harvest, seeding etc (6)
Retails sales (5)
Hospitality, - customer service (4)
Managers / supervisors (4)
Shearers (3)
Vineyard and olive workers (3)
Forklift drivers (3)
Engineering trades (3)
Kitchen hands (2)
Plant operators (2)
Truck drivers (2)
Tractor drivers (2)

Potential Growth Barriers

Workforce Accommodation Issues

One third (33%) of the respondents who answered the question about recruitment and retention of staff said that lack of housing was either a noticeable problem or a bad problem for them. It is significant that 79% of those who found lack of housing a problem were expecting growth in their organisations by 2006. Conversely, 53% of respondents who expected their organisations to grow found lack of housing a problem. It is therefore safe to expect that workforce accommodation problems will adversely affect the majority of Murraylands employers who recruit staff during the coming three years.

The locations where respondents said workforce accommodation is required were (in order of frequency of mention) Murray Bridge (and nearby localities), Meningie, Lameroo, Parilla, Mannum, Pinnaroo, Karoonda, Morgan, Nildottie, Coonalpyn, Bow Hill and Swan Reach.

However, these observations only convey a partial picture of the problem. They do not take into account factors such as the number and location of the new positions in relation to available accommodation. They also ignore the affect of large organisations who's growth details were passed on in confidence by local councils. A more complete picture may be gained by considering the numbers of new positions expected in each locality. Table 8 goes some way towards providing this picture, however it must be understood that the figures quoted are taken directly from the survey questionnaires, and no attempt has been made to predict total growth from such small samples by adjusting them upwards. They are therefore extremely conservative indicators, and in total represent little more than a third of the anticipated growth.

Table 8

Growth positions contained within the sample, - by locality

(These numbers have not been "scaled up" and therefore do not purport to estimate the full number of growth positions for each locality).

Location	Positions from Sample (Average Years)	Positions from Sample (Good Years)	Positions from Sample (Bad Years)	Percentage of regional growth (in average years)
The Coorong (DC)				
Meningie	25	34	2	2
Tintinara	27	28	1	2.2
Tailem Bend	10	11	1	0.8
Other Areas	5	5	0	NA
Total	67	78	4	5.5
Karoonda E Murray (DC)				
Karoonda LGA	126	126	65	10
Mid Murray (DC)				
Mannum	41	42	7	3.3
Bow Hill	31	63	16	2.5
Swan Reach	10	10	0	0.8
Other Areas	32	53	1	2.6
Total	114	168	24	9.2
Murray Bridge (RC)				
Murray Bridge	435	641	240	35
Monarto	297	304	99	25
Other Areas	12	28	1	1
Total	744	973	340	61
S Mallee (DC)				
Parilla	149	157	100	12
Pinnaroo	15	17	2	1.2
Lameroo	11	11	8	1
Total	175	185	110	14.3

It is also worth noting that the 126 positions expected within the Karoonda LGA nearly all stem from a single mining employer expected to set up operations in the near future. Survey response indicate that other organisations in this area will be close to static in regard to growth. Similarly, nearly all of the 297 positions expected at Monarto (and to a lesser extent the 149 positions expected at Parilla) will be with recent or in-coming enterprises, growing or setting up during the survey period, and low or nil growth is expected from other organisations in these localities. In these cases, the numbers quoted here represent most to all of the expected growth.

In other areas however, especially those with larger populations, the numbers quoted represent the growth expectations of a small sample of the total number of organisations. The growth expected by all the organisations in these areas must therefore be much greater. For example, the growth predicted by the sample of 66 organisations in the locality of Murray Bridge (excluding nearby districts) is 435; however by applying the adjustments referred to under "Methodology" above, this number is calculated to represent an actual growth expectation of about 1,230.

The samples of organisations from townships such as Meningie, Tintinara, Tailem Bend, Karoonda, Mannum, Pinnaroo and Lameroo are too small to be used to estimate their total growth expectations in a similar manner with any validity. Nonetheless, because these samples are much smaller than the total number of organisations in each area, total growth expectation must be proportionally greater. A factor of between two to three times the figures stated above for these localities could be applied as a very rough guide.

No survey is capable of predicting future trends with absolute accuracy. Nonetheless, from these figures we may confidently assert that a sample of 205 Murraylands employers expect growth in their organisations as apportioned in Table 8 above, and that conservative adjustment factors suggest that the growth expected across all Murraylands employers is likely to be approximately two and a half times as great. Applying this statement in each location and comparing the results with the actual amount of nearby vacant accommodation, will give us some idea of the magnitude of our workforce accommodation challenges.

Employment, Education and Training Issues

Questions concerning employment, education, training and skilling issues were addressed by most respondents who employed staff. Across the region, 36% of these respondents found that lack of education and training were a noticeable or a big problem with the recruitment and retention of staff. 46% (including virtually all of the aforementioned) found lack of skills and qualifications to be a noticeable or big problem as well.

Table 9

Employment, education, training and skills barriers to staff recruitment / retention

LGA	The Coorong	Karoonda E Murray	Mid Murray	Murray Bridge	Southern Mallee	Murraylands Region
Number addressing question	14	6	27	48	17	112
Education / Training = Problem	50%	33%	37%	27%	47%	36%
Skills / Qualifications = Problem	57%	33%	44%	38%	59%	46%

Closer acquaintance with the data underlying these figures allows some interpretations to be made. Anticipated growth in the Karoonda East Murray LGA is almost entirely limited to one organisation which plans to set up operations in the near future. Thus the small numbers from the Karoonda LGA reflect the comparative rarity of staff recruitment undertaken by existing employers in this area. If we therefore discount the Karoonda responses as important indicators, we then see that an alarmingly high proportion (46%) of Murraylands employers find that lack of education, training, qualifications and skills are problems for their recruitment and retention of staff.

We also see that these problems are more marked in the outlying LGAs. In particular, access to training is evidently an important issue. Not surprisingly, Murray Bridge organisations were virtually unanimous in wanting their training delivered in Murray Bridge. However, most respondents from the other LGAs wanted their training delivered much nearer to home (61% in Mid Murray, 83% in Karoonda East Murray, and 100% in Southern Mallee and the Coorong).

66% of respondents agreed that there are types of staff that are hard to recruit. In specifying the types of staff concerned, they revealed a very wide range of disparate occupations. The following list contains all these occupations in order of frequency of mention. The numbers in brackets represent the number of employers who mentioned them.

Table 10

Hard-to-find occupations (not necessarily anticipated positions)

Farm Hands / skilled agricultural workers (12)
Shearers (4)
Agricultural machine operators / tractor drivers etc (4)
Nurses / paramedical workers (4)
Clerical / administration / computer operation (4)
Undefined technicians / machinists / trades-people (4)
Managers / professionals, undefined (4)
Drivers (including heavy vehicle, livestock etc) (4)
Spray painters (3)
Cooks / Chefs (3)
Shed hands (2)
Welders (2)
Diesel mechanics (2)
Electricians (1)
Boilermakers (1)
Planning / building officers (1)
Building trades, undefined (1)
Plumbers (1)
Chlorine fitters (1)
Tyre fitters (1)
Panel beaters (1)
Spare parts interpreters (1)
Sheet metal workers (1)
Engineering trades, undefined (1)
Backhoe operator (1)
Butchers (1)
Cleaners (1)
Pharmacist (1)
Accountants (1)
Housekeepers (1)
Bar staff (1)

Most respondents qualified their listing of hard-to-find occupations by stating attributes they require, such as reliability, motivation skill, etc. The strong impression conveyed by the questionnaire responses is the individual nature of each employer's needs. Not only is the list of occupations unexpectedly long (the above table disguises this factor by grouping similar occupations under single titles), but very few employers share the same requirements. It is therefore not surprising that the types of training employers would like their staff to do if it was provided locally makes a similarly long and diverse list. 39 respondents agreed that their staff require computing training, 33 quality systems, 29 marketing and 24 accounting. However when asked to specify other desired types of training, 36 different types were listed, only 9 of which were shared by more than one respondent. With some grouping of similar topics, they are as follows:

Table 11

Types of training desired locally

Customer service (6)	Diesel vehicle maintenance (1)
Hospitality (3)	Food standards (1)
Driver training, truck & advanced (3)	Fence straining (1)
Occupational Health and Safety (3)	Forklift licence (1)
First Aid (2)	Irrigation design (1)
Aged care (2)	Local government systems (1)
Dealing with difficult customers (2)	Managing staff / HR (1)
Retail skills / merchandising / Display (2)	Nursing (1)
Production scheduling & skills (2)	Office skills (1)
Livestock handling (2)	Road worker skills (1)
CNC lathe programming (1)	Servicing equipment (1)
Auto CAD drafting (1)	Shearing (1)
Business systems (1)	Spare parts marketing (1)
Chemical handling (1)	Time management (1)
Cleaning (1)	Tractor operating (1)
Cylindrical grinding (1)	

Of course it must be remembered that the sample only represents a fraction of the actual number of employers. However, we must suspect that if the training requirements of all the Murraylands' employers were known, the list would increase in length rather than commonality.

Other Issues

In addition to the major issues of workforce accommodation and employment education and training, respondents identified a number of other problems which they experienced in the recruitment and retention of staff. They are listed in the table below in order of importance. The numbers specify the proportion of employers responding to the question who identified the problem.

Table 12

Other barriers to recruitment / retention of staff

- Motivation (35%)
- Lack of child care (24%)
- Lack of transport (21%)
- Location problems, - isolation, small town image, lack of activities etc (17%)
- Financial problems, - low profitability, cost of wages, cost of training etc (12%)
- Drugs and alcohol (12%)
- Lack of medical services (8%)
- Lack of hospital facilities (7%)
- Discontinuity of work available (3%)
- Paper-work (2%)
- Unfair dismissal (2%)

Conclusion

The major thrust of this survey is to establish and plot the magnitude of the growth expected by organisations in the Murraylands. Every opportunity has been taken to ensure that conservative interpretations were applied wherever doubt existed; nonetheless the data leads to the unavoidable conclusion that the growth experienced in the recent past is set to continue or accelerate during the coming three years.

This prediction is very encouraging, but it is also under threat. Workforce accommodation shortages and education training and skilling inadequacies have the potential to stall the anticipated growth unless they are addressed.

These problems may be solved, but they will not solve themselves. The findings of this survey show us that the Murraylands will benefit from a continuing growth phase, providing its communities insist on the application of business and government strategies to remove the barriers and claim the future.

Glossary of Acronyms

ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ANZSIC	Australia / New Zealand Standard Industry Classifications
ATO	Australian Taxation Office
DC	District Council
LGA	Local Government Area
MEETN	Murraylands Employment, Education and Training Network
MRDB	Murraylands Regional Development Board
RC	Rural City

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