

Gold Coast Labour Force Capability and Futures Assessment

Final Report

Regional Development Australia Gold Coast
October 2013



Independent insight.



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EXECUTIVE SUMMARY

SGS Economics and Planning (SGS) was engaged by the Regional Development Australia (RDA) - Gold Coast and the Gold Council City Council to undertake an analysis of the current and future skills requirements for the Gold Coast and how this may impact on the economic development potential of the region. The study was primarily desktop based utilising existing datasets and available literature. This analysis was also supplemented with two workshops with federal, state, regional and local levels of government, tertiary education providers and local businesses to identify and confirm skill requirements and discuss barriers and opportunities to meeting these requirements.

Broader policy work and approaches to dealing with skill shortages

A review of national, state and comparable regions policy work was completed to provide an understanding of where skills shortages were apparent in the broader economy (beyond just the Gold Coast). The review also focussed on how other jurisdictions have sought to address misalignments in skills.

Nationally, research completed by the Federal Government Department of Education, Employment and Workplace Relations (DEEWR)¹ found that skills shortages are currently less widespread than at any time in the last six years. Nevertheless, shortages still exist within selected technical skilled occupations (such as automotive trades and engineering professionals). In Queensland, half of the 20 occupations surveyed in 2012 were found to have skills shortages. These were primarily in the professional and trade occupations.

There are a range of policy documents/plans, at state, regional and local levels, which identify workforce skills as an issue and which set out a range of initiatives/objectives to address this challenge. These documents include:

- *Great skills. Real opportunities* (Queensland)
- *Skills and Workforce Development Investment Plan 2013 (The Plan)* (Queensland)
- *South East Queensland Regional Plan 2009-2031 (SEQRP)*
- *The Regional Roadmap 2012-13 (The Roadmap)*, and
- *Business Gold Coast Economic Development Strategy 2020*.

A study of Greater Geelong in Victoria and Lower Hunter in New South Wales identified that these locations have experienced similar workforce skills challenges and have experienced changes to the structure of their economies. These jurisdictions are seeking to partner with local organisations, higher education institutions and the wider community to better align training with future industry needs.

Profiling the Gold Coast workforce and jobs

A detailed desktop analysis of resident workers and jobs within the Gold Coast was completed to identify where shortages exist and how the composition of the economy has evolved.

A recent trend in the Gold Coast's resident workforce has been the considerable growth in employment within the Mining industry. Notably, these jobs are likely to be located outside of the Gold Coast (i.e. Fly-

¹ DEEWR has since been reorganised into the Department of Employment and Department of Education.

In-Fly-Out employment). Other significant industries include Retail Trade, Health Care, Construction and Accommodation & Food Services.

The Gold Coast's resident workforce comprises mostly Professionals and Community & Personal Service occupations. The data also shows that resident workers have a lower level of education attainment compared to Brisbane and South East Queensland, with a smaller proportion having obtained bachelor or postgraduate qualifications. However, over the last 10 years and there has been a large increase in residents with bachelor degrees or with skilled labour qualifications.

In 2011, the largest industries of employment in the Gold Coast were Health Care & Social Assistance, and Retail Trade and Construction, both of which are very labour intensive industries. While tourism and population related sectors remain a significant part of the economy, the Gold Coast economy is becoming increasingly more diverse with strong growth in professional service type sectors.

Of industries within the Gold Coast's knowledge sector between 2001 and 2011, there were strong jobs growth (in absolute terms) occurred in Accounting, Legal Services and Computer System and Design and Related Services. This highlights economic momentum in these industries and an opportunity for on-going jobs growth.

Current and future skill requirements in the Gold Coast

Analysis of migration and journey to work patterns suggest there are no existing skills shortages across broad industry sectors. Rather there appears to be shortages in selected sub industries, specialisations or at the managerial level. These findings were reiterated during consultation. This form of skills shortage is reflective of a smaller economy which, due to size and depth of the market, is not capable of supplying all skills types across all sectors, particularly for specialised/niche sectors.

Employment projections by industry have been used to highlight future requirements under a business-as-usual and alternative scenario, with the latter reflecting a more diverse advanced business services focused economy.

This analysis highlights that the largest future skills requirements will be in the Health Care & Social Assist, Retail Trade, Accommodation & Food sectors. However, knowledge services based sectors, such as Finance and Insurance, Education and Administrative & Support Services, will also see significant growth. Importantly, these sectors require a mix of skills quite different from the existing workforce profile.

Under a business-as-usual scenario, employment growth in Education & Training is projected to be strongest in population serving areas of education (employment in pre-school and school education) and slower in tertiary education. Harnessing opportunities to improve growth within the tertiary education sector will help to strengthen and grow the Gold Coast's knowledge sector. It is also an opportunity for an export oriented tertiary education sector.

The dynamics between the Gold Coast's existing workforce skills, its current and future requirements and its ability to meet these challenges is very complex. A small misalignment in a specific niche/specialised sector could have a significant impact on the broader economy. More general skills requirements across major growth sectors, such as the health sector, also need to be managed appropriately.

The following table seeks to highlight some existing and potential future requirements and provides some assessment of the ability of the Gold Coast to meet these requirements.

TABLE 1 EXISTING AND POTENTIAL FUTURE SKILLS CHALLENGES

Selected occupations/industries	Existing skill requirements	Potential skill requirements	Ability to meet requirements	Comments
Specialised skills				
Specialised doctors/health professionals (i.e. dentistry, specialist medical services, pathology and diagnostic imaging services)	X	X	Hard	Given the size of the Gold Coast economy it can be difficult delivering and retaining skills in specialised sectors of the economy. Typically there is insufficient depth in the economy to provide job security and growth potential.
Engineering design and engineering consulting services	X	X	Hard	
Management advice and related consulting services	X	X	Hard	
Computer system design and related services	X	X	Moderate	
Event management	-	X	Moderate	
Niche, R&D focused, advanced manufacturing	X	XX	Hard	
Specialised construction skills (i.e. electricians)	X	X	Moderate	
Senior management roles	X	X	Hard	
Higher education skills (i.e. bachelor/ postgraduate)				
Doctors	-	-		
Nurses	-	XX	Moderate	An old and aging workforce combined with strong projected future growth is likely to lead to possible shortages in the future.
Teachers	-	X	Moderate	An existing old and aging workforce could result in future shortages
ICT workers	X	XX	Hard	As the industry is quickly evolving and is highly specialised there is insufficient depth in the Gold Coast

Selected occupations/industries	Existing skill requirements	Potential skill requirements	Ability to meet requirements	Comments
economy to support the full range of services effectively.				
Skilled labour (Certificate)				
Allied health/support sector	X	XX	Moderate	This sector is expected to grow significantly in the future. A challenge will be ensuring there are sufficient skilled workers to meet requirements.
Construction workers	S	-	-	The slow down (post-GFC) in the residential sector has resulted in a surplus in general construction workers. This is unlikely to be an ongoing issue given the workforce is old and aging and residential development is likely to strengthen in the future given strong population forecasts.
Unqualified				
Retail/ Accommodation/ Recreation Services	XX	XX	Easy	Tourism will remain a dominant component of the Gold Coast economy, however, due to the profile of the existing workforce this challenge should be achievable. Increased demand as a result of the Commonwealth Games may require temporary additional skills.
Manufacturing	S	S	-	Traditional manufacturing is shifting toward hi-tech/value add operations or logistics and warehousing operations resulting in a likely surplus of traditional low-skilled manufacturing workers.
XX - significant shortage X - emerging shortage - - no shortage S - surplus of skills				

Recommendations

The Gold Coast's skills requirements cannot be considered in isolation but must be done so in the context of the region's broader economic development objectives. As such, recommendations for meeting skills requirements consider both economic development opportunities as well as ways to skill existing residents and attract new residents to achieve a more diverse and resilient economy.

Recommendations are grouped into themes. Each recommendation includes a suggested timeframe and a series of actions and potential partners.

Existing Business Development

- Facilitate access to skills enhancement and business development opportunities.
- Advocate private and public capital opportunities.
- Improve understanding of existing and future skills shortages.
- Making business easy.

New Business Investment

- Market and promote the Gold Coast and its potential to the business and investment communities and government funding bodies.
- Facilitate targeted economic development opportunity.

Industry Development

- Develop and maintain relationships with local industries.
- Develop and maintain inter-governmental economic development relationships.

Regional Workforce Development

- Boosting productivity of the workforce.

Infrastructure Needs

- Identify future infrastructure needs of industry and business and determine funding and implementation options.
- Advocate appropriate information and communications technology (ICT) infrastructure to support industry and business.

GLOSSARY

Term	Definition
ABS	Australian Bureau of Statistics
Gold Coast	Refers to the Local Government Area (LGA) boundary of the Gold Coast City Council
Brisbane	Refers to Metropolitan Brisbane, as currently defined by Local Government Area
South East Queensland (SEQ)	Refers to the metropolitan area from Sunshine Coast to the Gold Coast, comprising the LGAs of Brisbane, Gold Coast, Ipswich, Lockyer Valley, Logan, Moreton Bay, Redland, Scenic Rim, Somerset and Sunshine Coast
Queensland (QLD)	Refers to the entire State of Queensland
LGA	Local Government Area
SLA	Statistical Local Area
Jobs	The number of jobs in a particular area
Resident workers	The number of workers who live in a particular area
Labour force	For any group, persons who are employed or unemployed but actively seeking work
Unemployment rate	Number of unemployed persons expressed as a percentage of the labour force
AAGR	Average Annual Growth Rate
Postgraduate	Those who have obtained postgraduate qualifications
Bachelor	Those who have obtained bachelor degrees, graduate diploma or graduate certificate qualifications
Skilled labour	Those who have obtained advanced diploma, diploma or certificate level qualifications
Unqualified	Those who have no tertiary qualifications

1 INTRODUCTION

1.1 Gold Coast

SGS Economics and Planning (SGS) was engaged by the Regional Development Australia (RDA) -Gold Coast and the Gold Coast City Council to undertake an analysis of the current and future skills requirements and how they may impact the economic development potential of the region. The study was primarily desktop based, utilising existing datasets and available literature. To gain a deeper understanding of local issues, the analysis was also supplemented with two workshops.

The Gold Coast region is located in South East Queensland (SEQ), immediately north of the New South Wales (NSW) border and approximately 50 kilometres south-east of Brisbane (see Figure 1).

FIGURE 1. CONTEXT MAP



Source: SGS Economics and Planning, 2013

Gold Coast functions

To better understand the Gold Coast's skills requirements/challenges it is important to understand how the region functions. Importantly, the Gold Coast has a range of key economic assets, an improving public transport network and strong links to both Brisbane and northern New South Wales.

Economic assets

Major city economic assets within the Gold Coast include:

- Gold Coast Convention and Exhibition Centre
- Gold Coast University Hospital (due for completion 2013), adjacent to Griffith university
- Bond University
- Southern Cross University (next to the Gold Coast Airport)
- Southport Hospital
- Metricon Stadium (Carrara Stadium)
- Robina Stadium (Skilled Park).
- Gold Coast Light Rail (under construction)
- Queensland Rail Gold Coast heavy passenger line
- Pacific Motorway, and
- Gold Coast Airport.

The Gold Coast will also be hosting the Commonwealth Games in 2018.

Transport connections

Local historic characteristics and the fast pace of development has meant that the Gold Coast has evolved to become one of the most car dependent urban LGAs in SEQ. In the 21st century, this dependency threatens to stifle productivity through added time and energy costs associated with congestion and other negative outcomes.

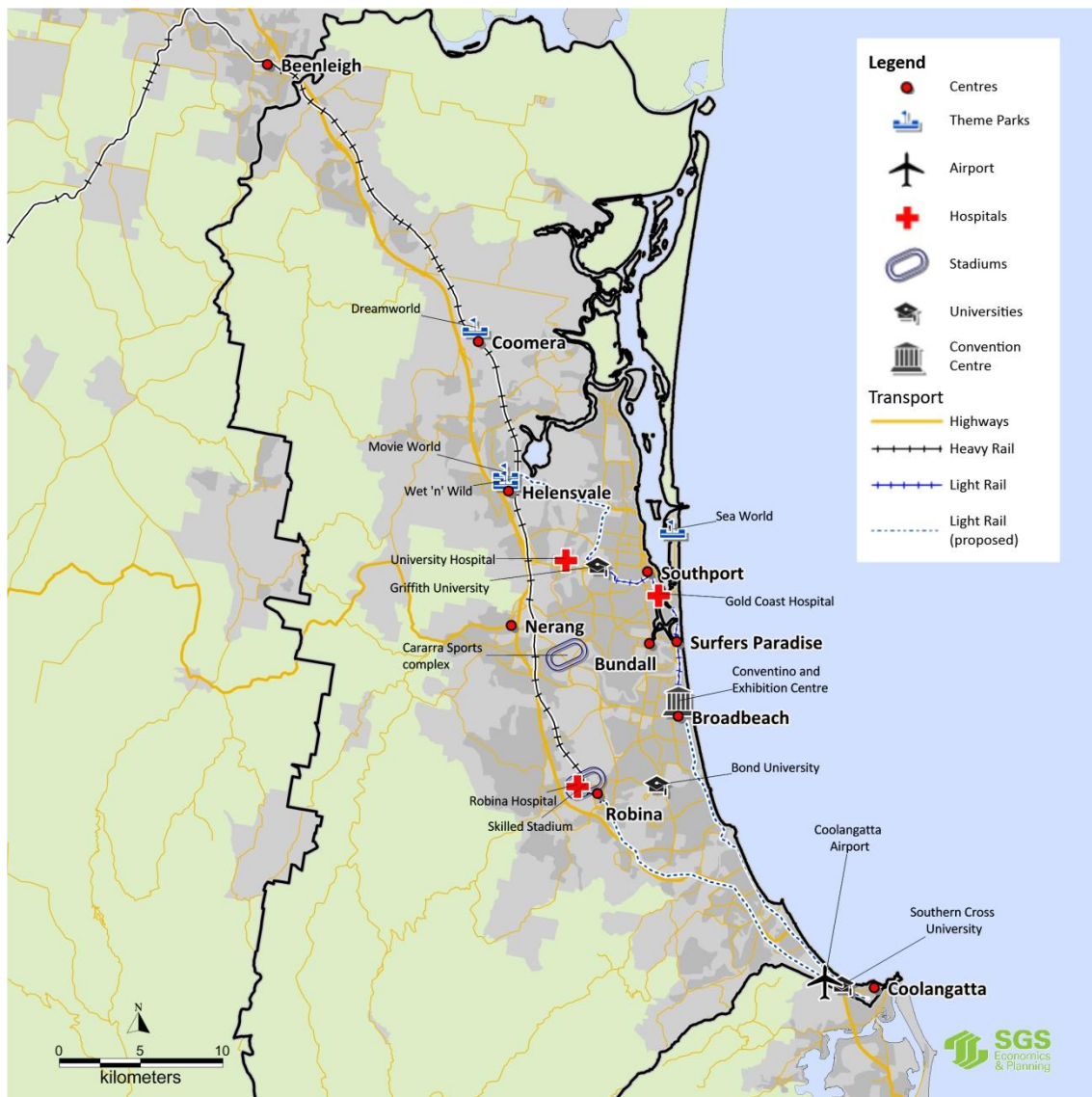
Strong integrated transport connections are also critical to the emerging knowledge sectors of the economy. Therefore, improved transport infrastructure, both public and private, will not only reduce congestion but will also help with the development of this sector of the economy and increase productivity.

The linear nature of the city, resulting from the appeal of the coast and the high density of dwellings and businesses that have followed, places the city in an advantageous position, enabling it to capitalise on density through linear public transport services. A prime example of such infrastructure is the Gold Coast Light Rail. This project will help to reshape the Gold Coast economy by integrating the various employment nodes and increasing the effective employment density across the region's various centres.

The Pacific Motorway will continue to be the dominant transport route through the LGA allowing movement of both passengers and cargo and connecting businesses with services within Brisbane and other centres. The Queensland Rail heavy passenger rail line forms a crucial public transport link to SEQ.

Key economic infrastructure and transport networks are shown in Figure 2.

FIGURE 2. ECONOMIC ASSETS AND TRANSPORT NETWORK



Source: SGS Economics and Planning, 2013

Land use

Land use in the Gold Coast varies significantly, ranging from areas of high natural amenity to areas hosting concentrations of economic activity. A great deal of economic activity is driven by the region's natural amenity. The region's coastline, rainforests, mountain retreats and other natural experiences create a diverse tourist offering.

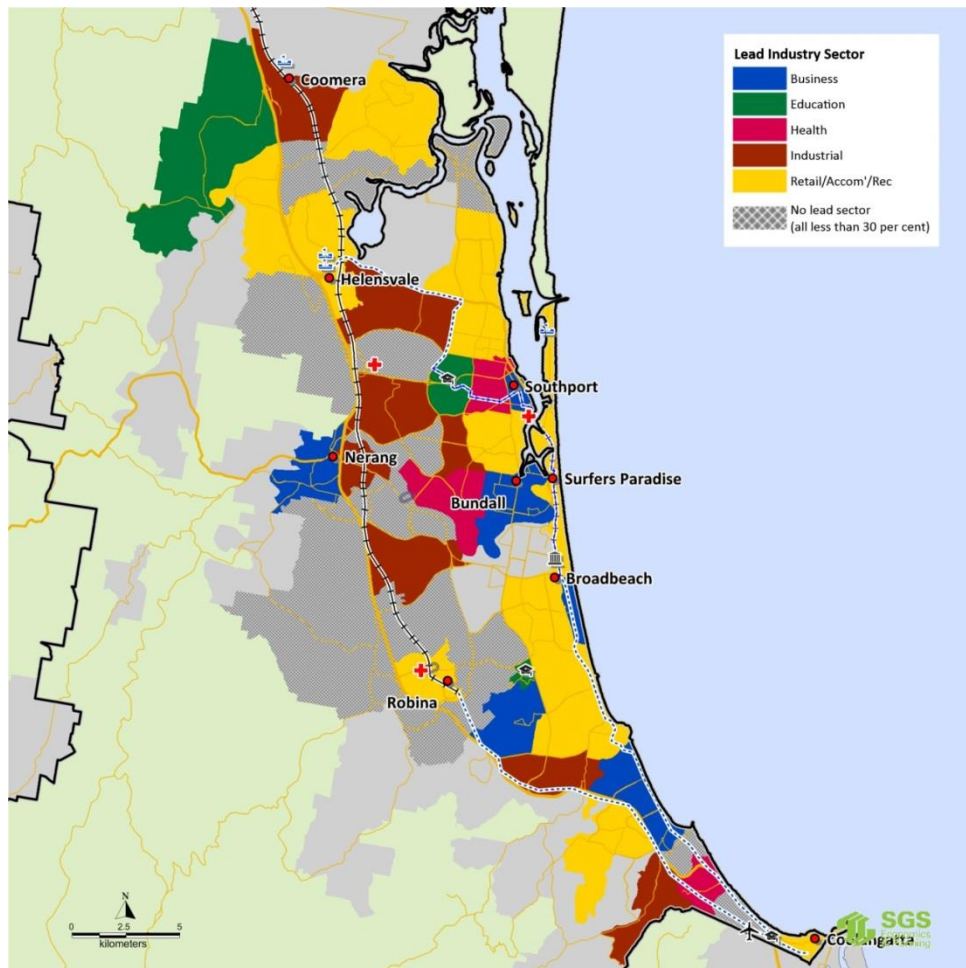
Urban development is categorised by a dense strip along the coastline and some activity centres located in the western half of the LGA. The South-East Queensland Regional Plan (SEQRP) has identified the following centres within the Gold Coast LGA:

- **Principal:** Southport, Robina
- **Major regional centres:** Coomera, Helensvale, Nerang, Surfers Paradise, Broadbeach, Coolangatta, and
- **Specialist centres:** Gold Coast Airport, Gold Coast Hospital Precinct.

The *SEQ Regional Plan 2009 - 2031* lists Coomera as a residential and employment Regional Development Area (RDA) and Steiglitz is identified as a local employment development area.

Figure 3 shows the dominant industries in the Gold Coast region in 2011. Retail, accommodation and recreation industries are dominant along the coastal areas with small pockets of business concentrated around Southport, Surfers Paradise and Robina. Industrial employment is located away from the coastal areas.

FIGURE 3. KEY INDUSTRY SPECIALISATION BY PLACE OF EMPLOYMENT



Source: SGS Economics and Planning, 2013

Connections to the broader region

Although the Gold Coast aspires to achieve greater autonomy as a self-sufficient entity, particularly in terms of employment and service provision, there are significant economic opportunities that can be realised by leveraging off the economies of scale generated within Brisbane and surrounding urban centres. Quality transport connections allow the Gold Coast to access key state infrastructure in Brisbane, such as the Brisbane Airport, port facilities for freight and the exporting of physical goods. Digital connectivity to the broader region, and the world, will allow the Gold Coast to better capitalise on the advent of the digital economy.

These connections serve to improve employment self-containment through means of teleworking and working from home. The Gold Coast, specifically major western regional centres, such as Nerang, serve as service centres for residents in the eastern areas of the neighbouring Scenic Rim, in locations such as Tambourine Mountain. Ensuring physical, as well as business relationships and other intangible connections with the broader region, will be vital in realising the Gold Coast's economic potential.

For this reason this study seeks to provide a holistic analysis and set of recommendations which expand beyond just pure skills levels where appropriate.

1.2 Economic drivers and enablers

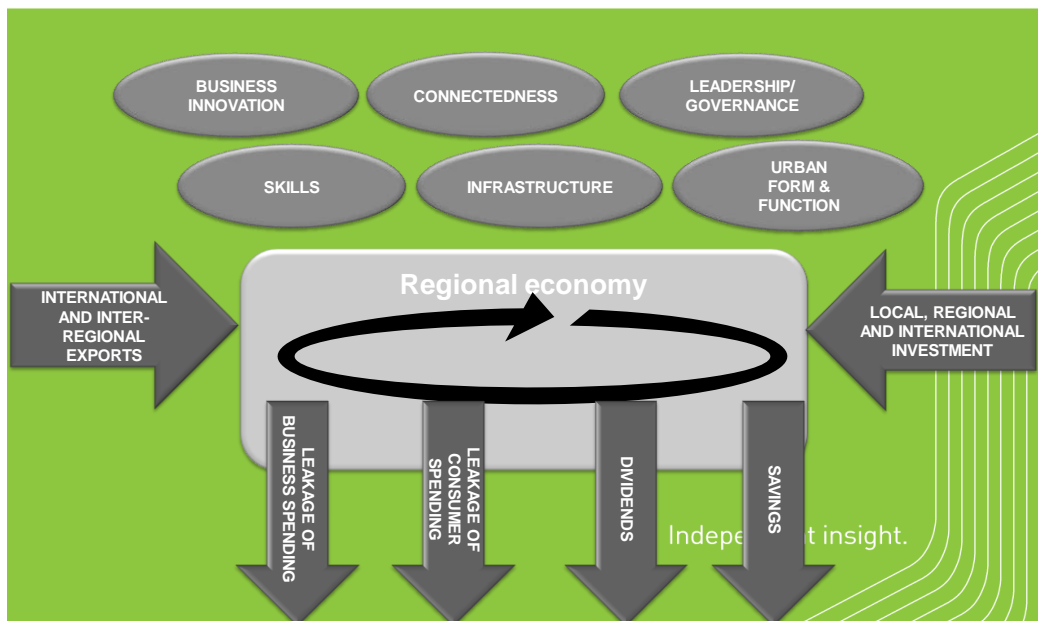
It is important to note that skills requirements cannot be examined in isolation but rather need to be considered in the context of how the broader economy functions and is changing. This section examines the broader economic drivers and enablers of regions.

Developing an effective strategy to address skill requirements necessitates a sound understanding of the current strengths and opportunities of a region. A useful way of framing this regional business analysis is in terms of the 'multiplier' model shown in Figure 4.

The key driver of a regional economy is its capacity to generate inter-regional export sales, that is, income injections from sales of goods and services to customers outside the region, whether these customers are located elsewhere in Gold Coast, Queensland, Australia or overseas. Investment in infrastructure, plant and equipment and housing also attracts external income that triggers a regional multiplier effect, as the new business orders enjoyed by exporters flow through to their suppliers and the local households that provide labour for these activities.

Of course, regional economies are completely open to inter-regional trade. The multiplier effect from inter-regional export sales and inward investment is inevitably diluted by 'leakages' of income. These occur when local businesses use outside suppliers for their inputs of materials and services, when local households shop outside the region, when local savings flow out to investments in other geographies and when dividends are distributed to external investors.

FIGURE 4. DRIVERS AND ENABLERS OF REGIONAL INDUSTRY AND JOBS GROWTH



Source: SGS Economics & Planning

Regional industry and jobs growth depends on boosting inter-regional exports and containing income leakages by building a more sophisticated, import replacing, local economy. The capacity to do either of these things depends on a range of enablers, namely:

- **Connectivity:** in a modern economy characterized by unbundled value chains or outsourcing, regions need to be well integrated physically with other major economic regions and nodes.
- **Skills:** productivity and competitiveness is vitally dependent on high quality human capital.
- **Local business innovation:** there are no “low tech” and “high tech” sectors, only leading and lagging businesses; whether the enterprise is involved in local retail or making global deals, it needs to be

dynamic in its business process development, seek out opportunities for new markets and invest in technology.

- **Infrastructure:** business activity is underpinned by a host of services and facilities which may be taken for granted – roads, telecommunications, water cycle management and, indeed, land which is pre-planned for employment uses.
- **Urban quality:** in a world of mobile talent and investors, regions must offer a high standard of liveability if they are to compete successfully.
- **Leadership and governance:** high performing institutions and business networks are necessary if community effort is to develop around a shared vision for jobs and industry growth. As well as local Councils and government agencies these include local business clusters, unions and industry associations.

As described above, skills are one of the elements required to enable regional economic growth. The more able a region is to match resident workers with local jobs, the less leakage from the economy will occur through business spending. Ensuring the local population is appropriately skilled for the local economy is therefore important for a region's economic growth.

1.3 Report method and structure

To this end, the following report has been informed by a number of analysis/research techniques:

- **Desktop data analysis:** An analysis of the current labour force and skills profile of the Gold Coast, both by industry and occupation, to identify any current skills shortages. Employment projections for two future economic growth scenarios – one in line with current industry and employment growth patterns and a second where the Gold Coast increases its share of knowledge service sector type jobs. This enables an analysis of the Gold Coast's future skills requirements.
- **Policy and literature review:** This review identifies policy aspirations for skills and economic development on the Gold Coast and for Queensland more broadly. A literature review details how comparative regions in Australia are addressing future skill requirements.
- **Consultation:** Two workshops were held with Federal, state, regional and local levels of government, tertiary education providers and local businesses to identify and confirm skill requirements and discuss barriers and opportunities to meeting these requirements.

The remainder of the report is structured as follows:

- **Chapter 2** provides a literature review of relevant economic and skills policy and data from all levels of government and from two comparator regions.
- **Chapter 3** profiles the current labour force and skills of Gold Coast resident workers.
- **Chapter 4** provides projections for employment and skills requirements for the Gold Coast to 2026. Projections are provided for a base case (business as usual) and an alternative employment growth scenario.
- **Chapter 5** presents policy recommendations.

2 LITERATURE REVIEW

The following section presents current national and Queensland skill shortage data from the Federal Department of Education, Employment and Workplace Relations (DEEWR²), a review of relevant state, regional and local government skills and economic development policy, and skills and economic development policy from two comparator regions - Geelong in Victoria and the Lower Hunter in New South Wales.

2.1 National and state level skills shortages

The Federal Government DEEWR carries out research on an annual basis to identify skills shortages in the Australian labour market. The research focuses on skilled occupations (those generally requiring at least three years of post-secondary school education or training). Skills shortages are reported at the national and state/territory level.

Nationally, the research found that skills shortages are less widespread than they have been during the last six years (43 per cent of assessed occupations in shortage compared with 84 per cent in 2007). Nevertheless, shortages are still evident for some occupations and are particularly apparent for:

- Automotive trades
- Engineering professionals and associates
- Food trades, and
- Resource sector occupations.

In 2012, Queensland experienced an increase in job vacancy fill rates, applicant numbers and numbers of suitable applicants per vacancy compared to previous years. In terms of vacancies filled, trade occupations decreased by one percentage point, with 68 per cent of vacancies filled in 2012 compared to 69 per cent in the previous year. The fill rates for professional vacancies increased between 2011 and 2012 from 59 to 65 per cent.

20 occupations were surveyed in 2012 with half of the professional and trade occupations found to be in shortage. These included:

- Child Care Centre Manager
- Child Care Centre Worker
- Automotive Electrician
- Fitters
- Painting Trades Worker
- Panelbeater
- Motorcycle Mechanic
- Metal Machinist
- Vehicle Painter, and
- Air-conditioning and Refrigeration Mechanic.

² DEEWR has since been reorganised into the Department of Employment and Department of Education.

2.2 State government policy

Great skills. Real opportunities. The Queensland Government reform action plan for further education and training

Great skills. Real opportunities outlines three reforms to Queensland's further education and training sector. Reforms, outlined below, are designed to support access to skills training to enable Queenslanders to find employment, contribute to the state economy and to their personal prosperity.

1. Engaging industry and employers in a partnership to match training to employment
 - Partnership between industry, employers and government to ensure skills needed for economic growth are identified and facilitated through a Ministerial Industry Commission.
 - A new vocational education and training (VET) investment framework with skills investment to be fully contestable by mid-2014 with a focus on courses and qualifications that are most likely to lead to employment for graduates.
 - VET in Schools arrangement with a focus on preparing senior school students for further training and employment.
2. Accessible to all Queenslanders
 - Certificate III Guarantee to give Queenslanders access to a government subsidised training place up to and including their first Certificate III level qualification in priority training areas.
 - A new website providing career and training information for students. Students will be able to see which courses are considered a priority by government, industry and employers.
3. Quality training linked to employment outcomes
 - Contestable funding to give students a greater choice of training provider and improve the quality of training delivered.
 - Changes to apprenticeship and traineeship arrangements making it easier to change employer and move interstate.

Skills and Workforce Development Investment Plan 2013

The *Skills and Workforce Development Investment Plan* (the Plan) identifies priorities for government investment in skills, qualification and workforce development. The Plan identified a widening gap between the needs of employers and the economy and the output of the skills system. The Plan proposes a skills system which is:

- Demand-driven
- Led by industry
- Flexible and responsive to the needs of the labour market
- Continuously improving skills development pathways, and
- Focused on performance and quality.

To improve the performance and output of the Queensland skills system, change is proposed in four areas:

1. Transforming vocational education and training (VET) investment
 - Moving from a supply-driven system to an industry-led, demand-driven funding model.
2. Public provider reform
 - Transformation of VET investment is predicated on a contestable market serviced by a competitive training provider network.
3. Enhancing apprenticeship and trade training pathways
 - Additional strategies are required to deliver the number of skilled people that will be required to meet expected future demand especially where poor economic conditions mean there are reductions in apprenticeship numbers.
4. Workforce planning and development
 - Establishment of a coordinated workforce planning and development framework in Queensland.

2.3 Regional policy

South East Queensland Regional Plan 2009-2031

In 2009 the Queensland Government released the *South East Queensland Regional Plan 2009-2031* (SEQRP) to manage growth, change, land use and development in SEQ (one of Australia's fastest growing regions) up to 2031. The statutory document takes precedence over all other planning instruments and informs state planning policy and priorities as well as local government plans and policies. The SEQ Region comprises 11 regional and city councils, including Gold Coast City Council.

The plan sets out the following vision for SEQ:

"a future that is sustainable, affordable, prosperous, liveable and resilient to climate change, where:

- Communities are safe, healthy, accessible and inclusive*
- There are diverse employment opportunities and quality infrastructure and services, including education and health*
- Urban and rural areas are mutually supportive and collaborative in creating wealth for the community*
- Development is sustainable and well designed and where the subtropical character of the region is recognised and reinforced*
- Ecological and culturally significant landscapes are valued, celebrated, protected and enhanced*
- The community has access to a range of quality, open space, recreational opportunities."*

The plan identifies that tourism will continue to be a significant economic driver for the Gold Coast. It also highlights the many opportunities afforded by 'new economy' science, technology and training facilities on the Gold Coast including the Gold Coast Hospital and Knowledge Precinct (which currently includes the Queensland Academy of Health Sciences and Griffith University) Oxenford's film and interactive media industry cluster, Robina Hospital and Bond University.

Regional Roadmap 2012-13, Regional Development Australia Gold Coast

The Regional Roadmap 2012-13 (the Roadmap) outlines a plan for the growth and development of the Gold Coast. The vision for the Gold Coast is *"come for the lifestyle, stay for the opportunities"*.

The roadmap identifies three priorities for the short term on which to focus its support:

1. Promote and enhance job creation
2. Strengthen the community and foster civic pride, and
3. Enhance the lifestyle and environment.

RDA Gold Coast works to achieve these priorities through engagement and collaboration with other stakeholders and partners. It plans to focus on seven key goals when reviewing projects to support: economic diversity, infrastructure, town planning, affordable housing, community, education/training and deregulation.

Economic Diversity and Education/Training

The goals of economic diversity and education/training are most relevant in the context of this study. RDA Gold Coast has identified the following strategic actions to support both these goals:

Economic Diversity: Attracting new and emerging industries and encouraging growth and diversification of existing industries.

- Encourage attraction of new and emerging industries and diversification of the tourism and construction sectors
- Facilitate delivery of small business support services
- Influence building on the strengths of the marine industry, and
- Promote co-branding of local businesses within the Gold Coast.

Education/Training: Encouraging increased education and training opportunities especially in the key sectors of health, information technology and environmental management.

- Support existing stakeholders in undertaking gap analyses to determine skills required by local industries
- Promote community, institutional and business connections and collaborations in planning future education and training provision
- Support existing networks to develop business opportunities from university research, and
- Digital economy training for business.

Regional Education, Skills and Jobs Plan – Queensland – Gold Coast 2012-2014

The *Regional Education, Skills and Jobs Plan* identifies key education, skills and jobs challenges for the region. To address identified challenges the plan outlines the following goals (including actions for each goal):

- *enable the region's Aboriginal and Torres Strait Islander people to participate in the development of, and benefit from, targeted strategies that aim to deliver on the Governments' Closing the Gap targets*
- *increase the number of Aboriginal and Torres Strait Islander Australians working in the early childhood and child care industry*
- *increase the number of people training in areas of skills shortages and industry growth*
- *identify and support strategies to assist Gold Coast businesses and residents capitalise on opportunities emerging from Queensland's expanding resources sector*
- *support the establishment of regional partnerships and strategies that enable effective and tailored school retention and work transition options for students, and*
- *identify and promote opportunities to assist apprentices to complete their trade qualifications*
- *encourage the development of tailored vocational training packages to increase participation amongst people with learning difficulties.*

The plan acknowledges the benefits that the Commonwealth Games will provide the local economy, including local employment and training opportunities.

2.4 Local government policy

Business Gold Coast Economic Development Strategy 2020

Gold Coast City Council's (GCCC) *Business Gold Coast Economic Development Strategy* sets out the direction for the economic development of the Gold Coast City until 2020. The Strategy has been developed within the context of Council's Bold Future Project, Corporate Plan, Annual Report and other organisational strategies. The strategy is underpinned by the following vision:

The Gold Coast community of 2020 will be underpinned by a diverse and competitive economy. It will be a preferred location in which to work, invest and live while maintaining its appealing lifestyle. It will be characterised by a balanced measure of economic wealth, environmental sustainability, cultural diversity and social equity all contributing to a mature and vibrant metropolitan economy.

The Strategy identifies five strategic outcomes for positioning the City to successfully capture the economic opportunities realistically available. These strategic outcomes are:

Strategic Outcome 1 - The economy is built on a diversified knowledge and strong export base.

Strategic Outcome 2 - Our infrastructure supports globally competitive business development and growth.

Strategic Outcome 3 - The supply of skilled labour meets local business requirements.

Strategic Outcome 4 - The lifestyle and opportunities are seen as advantages.

Strategic Outcome 5 - Regional collaboration and pro-active representation enhance the city.

The strategy acknowledges that for the City and region to prosper, it must continue to move beyond its relatively narrow economic base of tourism, construction and retail and broaden its economic base to have a more balanced economy. It is envisaged that growth will occur through the development of both existing and emerging industries, with a particular focus on moving towards a more knowledge intensive, high value and internationally competitive economic base.

A key strategic outcome stated of the strategy is to facilitate the supply of skilled labour to meet local business requirements. Key actions to achieve this strategic outcome include:

- Develop and promote the City's world class research and learning assets by working with educational institutions and promoting to national and international markets
- Implement the TechGC program to initiate long term 'school to work' and skills development programs that will encourage increased enrolment in science, technology, engineering and mathematics disciplines, and
- Work with the City's schools, universities, vocational and technical education institutions and other levels of government to implement initiatives that will encourage greater post-secondary school qualifications amongst residents.

Draft Economic Development Strategy 2013-2023

In recognition that economic growth on the Gold Coast has previously been driven by tourism and servicing the local population, the Gold Coast City Council's *Draft Economic Development Strategy 2013-2023* aims to increase employment in non-population serving industries with a focus on creating jobs that are driven by markets outside of the Gold Coast. This approach aims to attract new workers and further investment in the City. In an effort to increase the City's competitiveness and productivity, the strategy focuses on creating knowledge intensive activity, connectivity and economic density.

Accordingly, the strategy is built around six themes and objectives:

1. Innovation – to foster innovation to grow successful companies.
2. Cultural – to build a thriving cultural economy to attract skills, talent and investment.
3. Infrastructure – to drive business productivity through effective delivery of economic infrastructure.
4. Competitive business – to retain, grow and build a stronger competitive business environment.
5. Workforce – to create a sustainable workforce with skills to meet business and industry requirements.
6. International – to build on the City's tourism reputation to raise the Gold Coast's profile as an emerging world class business destination.

Under the workforce theme, the strategy identifies signature projects and activities aimed to improve skills and better align skills with employment opportunities. These include promoting linkages between education and employment, promoting the Gold Coast at the international level as a location for investment, education and employment, and implementing skills drive programs to match business requirements, including in the creative industry.

2.5 Comparator regions

This section provides a review of relevant policy from the City of Greater Geelong in Victoria and the Lower Hunter in New South Wales. These regions were chosen as they share key characteristics with the Gold Coast: they contain major cities located within close proximity to a larger capital city.

City of Greater Geelong – City Plan 2013-2017

The *City Plan 2013-2017* is a strategic document that identifies strategic directions, priorities and strategies to guide the City of Geelong's activities. Addressing skills shortages has been identified as a key challenge in the plan.

New and emerging growth sectors are to underpin Geelong's prosperity in the future; the research sector is identified as a key emerging sector for the region.

'A prosperous and innovative Geelong' is one of the objectives outlined in the strategic plan. To achieve this strategic objective, Council will:

- Encourage the region's labour force to continually upskill
- Foster investment in diversification of skills and industries
- Grow and promote business sectors that offer high-skilled employment, and
- Advocate for Geelong to be the centre of excellence for research projects, new technologies and emerging industry sectors.

Council aims to partner with organisations including Federal and state government departments, Department of Business and Industry, Chamber of Commerce, Geelong Manufacturing Council, higher education institutions (Deakin University, The Gordon) and the wider community to achieve these objectives.

Lower Hunter Regional Strategy 2006-31

The *Lower Hunter Regional Strategy* prepared by the Department of Planning applies to five local government areas of Newcastle, Lake Macquarie, Port Stephens, Maitland and Cessnock in New South Wales. The primary purpose of this strategy is to ensure land supply for projected housing and employment needs of the region's population over the next 25 years.

The strategy recognises that traditional industrial land will remain important to the regional economy as the region capitalises on its location, infrastructure (including port and airport) and skills base.

The Department of Planning, with key stakeholders (Newcastle City Council and Newcastle University), will develop a strategy to strengthen the physical and intellectual linkages between the university, industry and broader population. This will help address skill gaps and facilitate employment growth in the region by building on its research and development experience.

Analysis of these policies suggests higher education institutions will play a key role in addressing skills gaps in the region and help the economy transition to a knowledge based and export-oriented one. Local and state governments will need to collaborate with higher education providers and other training institutions.

3 LABOUR FORCE AND SKILLS PROFILE

This chapter examines the current structure of the Gold Coast economy. It presents data on Gold Coast jobs as well as the employment and skills profile of residents. A discussion of the broader economy follows providing context for the Gold Coast's future skills requirements.

3.1 Gold Coast jobs

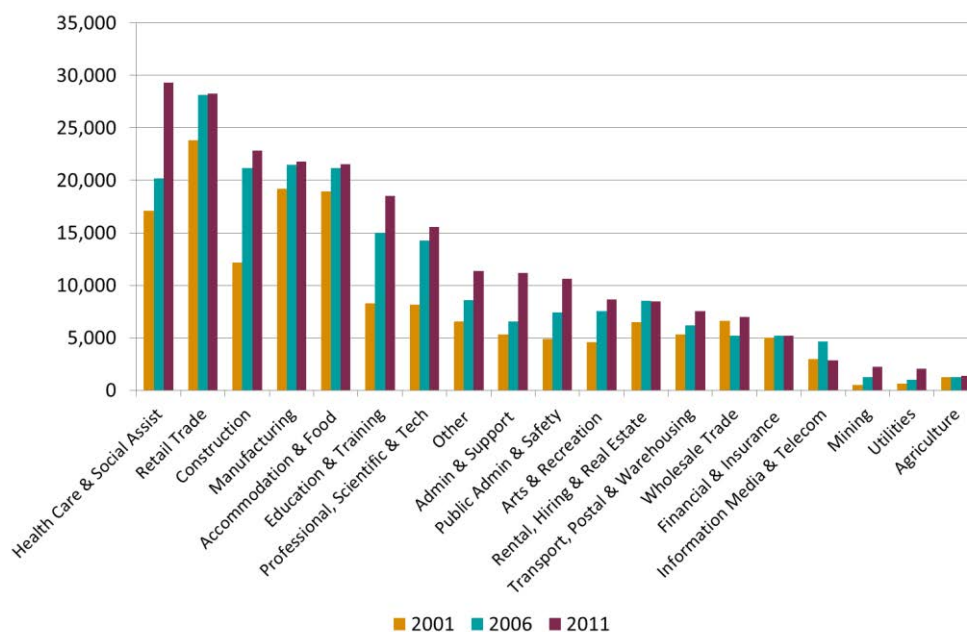
The following provides a summary of the recent trends and composition of jobs (not resident workers) available within the Gold Coast.

Employment by industry

There are very few large employers in the Gold Coast. The majority of businesses are small to medium enterprises or micro businesses.

In 2011, the highest employing industry in the Gold Coast was Health Care & Social Assistance, followed closely by Retail Trade, Construction, Manufacturing and Accommodation & Food (Figure 5). Significantly, in 2006 Health Care & Social Assistance was only the fifth highest employer but has since eclipsed all other industries to be the largest employing industry on the Gold Coast in 2011. Population growth and the age profile of the Gold Coast (which has a significant proportion of elderly residents) are likely to have driven much of the growth in this sector. Construction, Education & Training and Professional, Scientific & Technical industries have also seen significant growth in employment numbers in the 10 years to 2011.

FIGURE 5. GOLD COAST EMPLOYMENT BY INDUSTRY, 2001 TO 2011



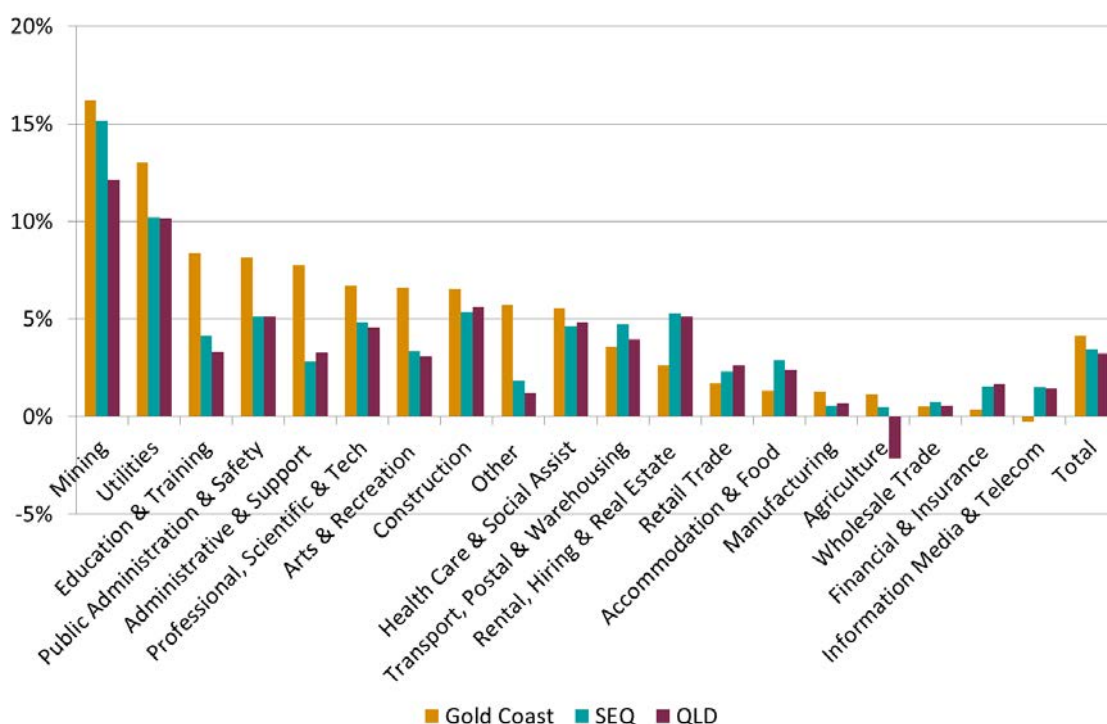
Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

From 2001 to 2011 the Gold Coast achieved a higher total employment growth rate than both SEQ and Queensland (QLD). In that time only a single Gold Coast industry (Agriculture) saw a contraction in employment however this was from a very low employment base (Figure 6). The comparatively high level of growth on the Gold Coast was particularly pronounced in the Education & Training, Public Administration & Safety, Administrative Support, Professional, Scientific & Technical and Arts & Recreation industries.

This shows the increasing diversification of the Gold Coast economy over the past 10 years. Among the slower growing industries, Rental, Hiring & Real Estate lagged behind the growth rates of both SEQ and QLD by the largest amount. Contrary to national trends, Manufacturing experienced positive growth (albeit at a declining rate) in the Gold Coast, SEQ and QLD.

Although the Mining and Utilities (i.e. Electricity, Gas and Water) industries experienced the highest levels of jobs growth, in 2011 they represented the two smallest industries by number of jobs after Agriculture. Conversely, the Health Care & Social Assistance and Construction industries had more modest growth rates but experienced the largest increase in jobs in absolute terms. In part, this reflects the different labour requirements for these industries, with Health Care & Social Assistance being a very labour intensive industry.

FIGURE 6. INDUSTRY AVERAGE ANNUAL GROWTH RATES, 2001 TO 2011

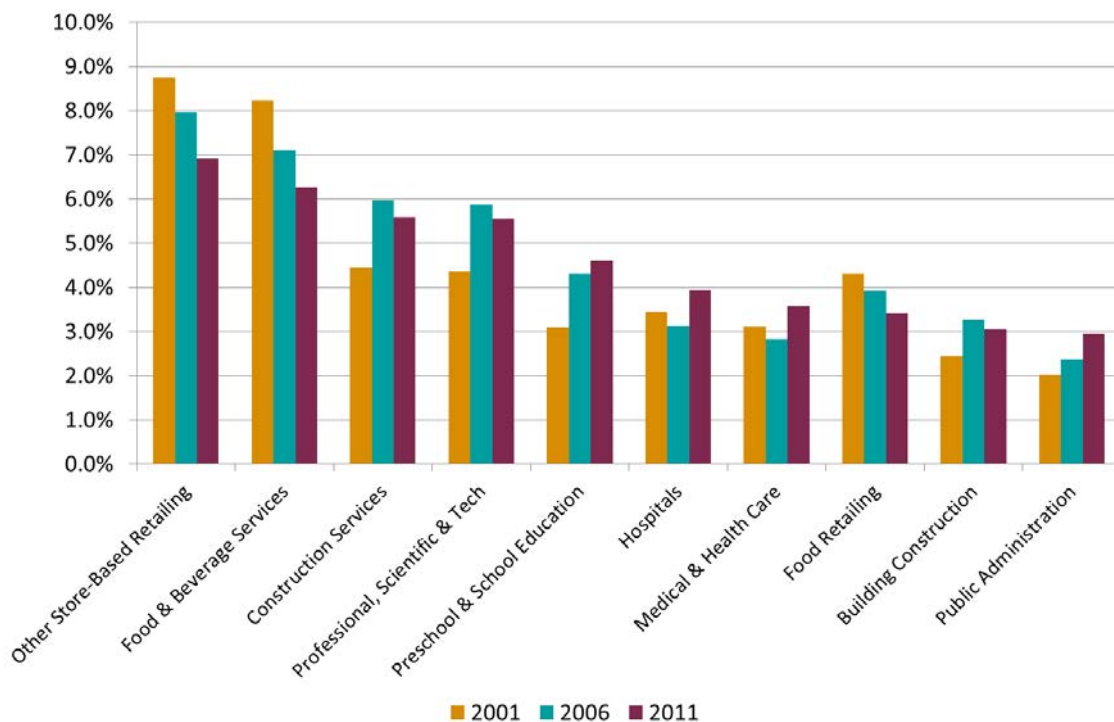


Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

The ranking of Gold Coast industries by their level of employment has remained relatively unchanged, with Other Store-Based Retailing (i.e. specialty stores, duty free stores, and tourism based retailers) and Food and Beverage Services consistently ranking as the two largest employing industries (Figure 7). These industries are traditionally very labour intensive.

However, relatively low growth rates in Food Retailing and Building Construction have resulted in these industries falling behind Hospitals and Medical & Other Health Care Services between 2006 and 2011. The full list of industry sectors in order of largest to smallest is provided in the appendix in Table 13.

FIGURE 7. GOLD COAST 10 LARGEST EMPLOYING INDUSTRIES

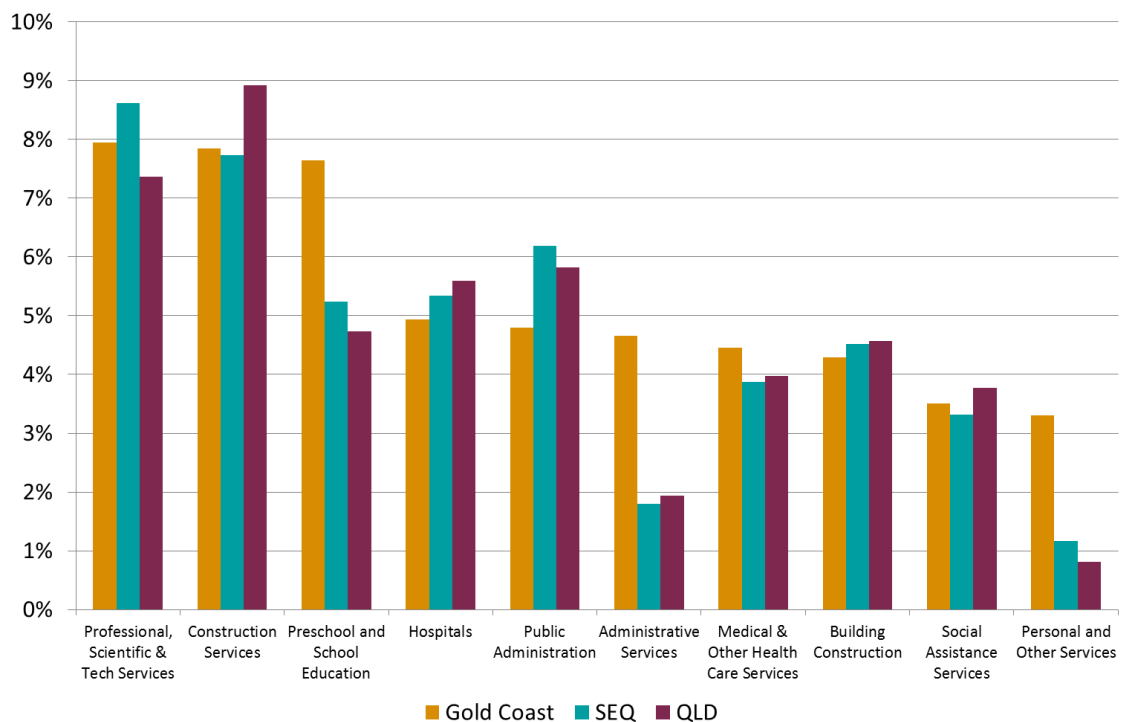


Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

Figure 8 presents the top 10 industries in the Gold Coast which experienced the greatest share of employment growth from 2001 to 2011. The top three industries (Professional, Scientific & Technical Services, Construction Services and Preschool and School Education) had similar shares of growth, approximately eight per cent of total jobs growth. Other industries that experienced strong growth were health care sectors, construction and other public and administrative services.

Consultation with local businesses revealed that, despite growth in these industries, difficulties were being experienced attracting workers in industries which require high skill levels, particularly Professional, Scientific and Technical Services. Because there are fewer jobs in these industries in the Gold Coast than in Brisbane, moving to the Gold Coast is considered a risk. That is, if a highly skilled worker were to move to the Gold Coast and then lose their job there would be far fewer jobs within these industries for that worker to move into compared to in Brisbane.

FIGURE 8. GOLD COAST 10 STRONGEST GROWTH INDUSTRIES, 2001 TO 2011



Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

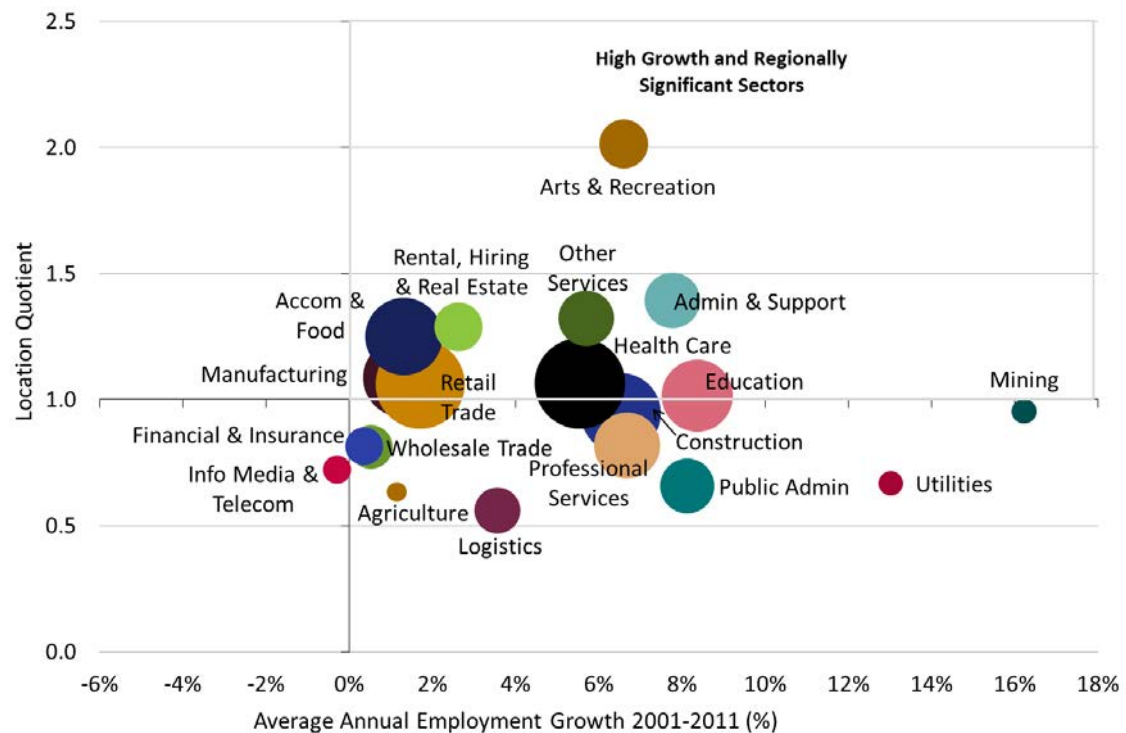
A location quotient (LQ) index was derived to show the concentration of employment by industry on the Gold Coast compared to SEQ. The index was derived by comparing the proportion of jobs by industry in the study area with the proportion of jobs by industry in SEQ. A score over 1.0 indicates an overrepresentation of jobs in that sector, thus indicating a higher degree of concentration in that sector compared with a wider benchmarked region. In other words, it states that a quantum of those jobs is generated by external export (non local) demand. A score of less than 1 implies that it is an import sector.

Using the LQ, a growth share matrix has been generated for the Gold Coast (Figure 9) as compared to SEQ. The matrix shows the LQ index for each industry (compared with SEQ) together with the annual average change in employment by industry between 2001 and 2011. The matrix is divided into four quadrants, each quadrant defining the stage of lifecycle for an industry. These stages in the lifecycle are as follows:

- **Expanding Stage:** If in the top right quadrant (high average annual growth and high concentration).
- **Emerging Stage:** If in the lower right quadrant (high average annual growth but lower concentration), this implies an emerging industry that may need some assistance to mature.
- **Transforming Stage:** If in the upper left quadrant (lower average annual growth but above average concentration), this implies the industry is at risk (overall) and needs to increase innovation and productivity to compete with other regions.
- **Seed or Transitioning Stage:** If in the lower left quadrant (lower average annual growth and lower concentration), this implies that the industry is not growing. This suggests that the industry will need to innovate or specialise to retain competitiveness.

The majority of the large employing industries are observed to be in the expanding stage. These include four of the five largest industries: Health Care & Social Assistance, Retail Trade, Manufacturing and Accommodation & Food. Equally significant is the fact that the Gold Coast has no industries in the emerging state and only Information Media & Telecommunications in the transitioning state.

FIGURE 9. GROWTH SHARE MATRIX FOR GOLD COAST EMPLOYMENT COMPARED TO SEQ



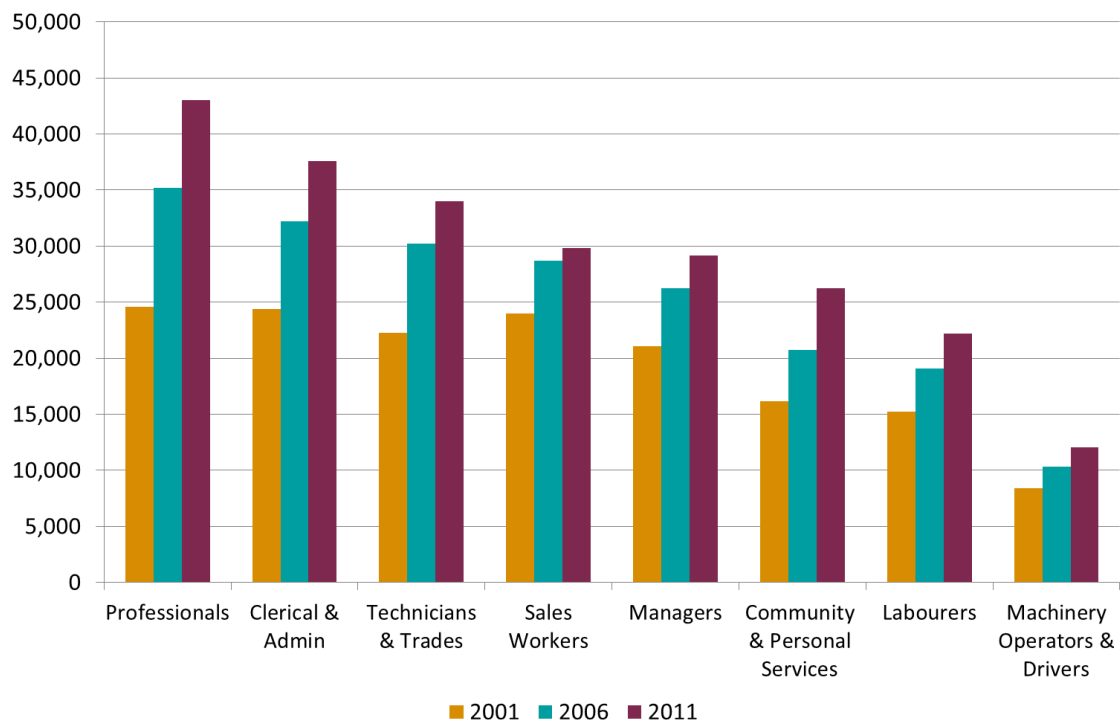
Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

Employment by occupation

In 2011, the largest employing occupation category in the Gold Coast was Professionals, which made up 18 per cent of the total workforce (Figure 10). This occupation category also experienced the largest amount of growth over the last 10 years, at a rate of 5.7 per cent, a much higher growth rate than experienced by SEQ and QLD over the same time period (see Figure 11). Clerical and Administrative workers and Technicians and Trades workers also made up a significant proportion of the Gold Coast workforce in 2011. Annual growth was higher in Gold Coast than in SEQ and QLD across most occupations, with the exception of Sales Workers which had the lowest growth rate of 2.2 per cent per annum.

Consultation highlighted that workers in managerial positions tend to have lengthy tenures largely because there are few jobs at this level on the Gold Coast. It was suggested that this made it hard for junior staff to see a clear career pathway and may lead to more ambitious staff moving elsewhere to pursue managerial positions.

FIGURE 10. GOLD COAST EMPLOYMENT BY OCCUPATION, 2001 TO 2011



Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

FIGURE 11. AVERAGE ANNUAL GROWTH RATES BY OCCUPATION, 2001 TO 2011

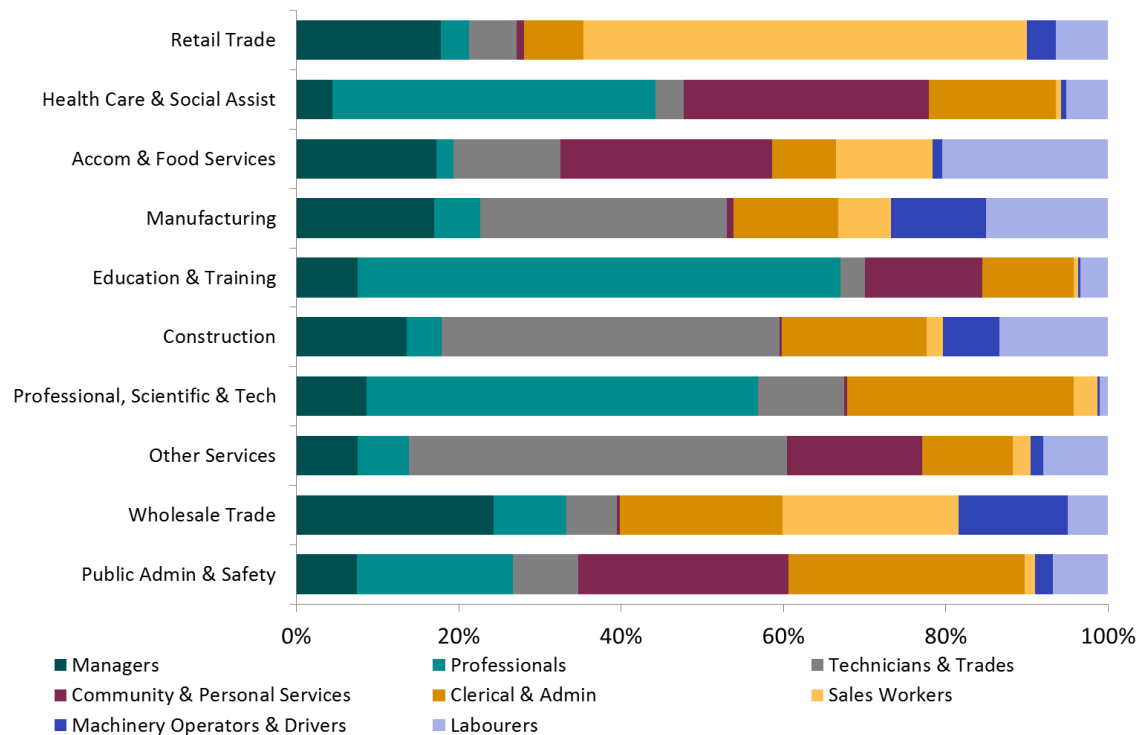


Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

Figure 12 presents the distribution of occupations by industry for jobs in the Gold Coast in 2011. It illustrates the large proportion of Managers and Professionals employed in the Health Care & Social Assistance, Education & Training and Professional, Scientific & Technical Services industries. Alternatively,

industries such as Retail Trade, Wholesale Trade and Public Administration & Safety include a large proportion of Sales Workers and Clerical & Administrative Workers. Manufacturing and Construction industries comprise mostly Technicians & Trades Workers, Labourers and Machinery Operators. This highlights the varying skills profile of each industry for workers currently employed in the Gold Coast.

FIGURE 12. OCCUPATION BY INDUSTRY GOLD COAST 2011



Source: ABS Census 2011

Table 2 provides a finer level of detail for employment in the knowledge sector for the Gold Coast. Over the past decade employment has been highest in Accounting Services, which has also experienced the largest growth in jobs.

Computer System Design and Related Services and Legal Services have also seen a relatively large increase in jobs. Employment in the health sector increased consistently between 2001 and 2011 as evidenced by growth in General Practice Medical Services, Specialist Medical Services and Pathology and Diagnostic Imaging Services. Broadly, these trends indicate that the Gold Coast has experienced consistent growth in jobs requiring technical skills.

TABLE 2. GOLD COAST KNOWLEDGE SECTOR EMPLOYMENT, 2001-11

Industry	2001	2006	2011	# change (2011-11)
Boatbuilding and Repair Services	1,196	1,337	1,356	160
Eng Design and Eng Consulting Services	926	1,620	1,768	842
Management Advice & Related Consulting Services	808	1,414	1,543	735
Legal Services	1,104	1,931	2,108	1,004
Accounting Services	1,649	2,886	3,149	1,500
Advertising Services	474	830	906	431
Computer System Design and Related Services	1,247	2,183	2,382	1,135
Specialised Design Services	352	615	672	320
General Practice Medical Services	1,179	1,391	2,023	844
Specialist Medical Services	537	633	920	384
Pathology and Diagnostic Imaging Services	496	585	851	355
Total	9,967	15,424	17,679	7,712

Source: SGS Economics & Planning based on ABS Census

Table 3 provides a breakdown of employment the Arts & Recreation industry. Over the past decade employment in this sector has been concentrated in amusement, sports and physical recreation and gambling activities. This in part reflects the significant role tourism plays in the Gold Coast, strongly influenced by theme parks and opportunities for recreation activities.

TABLE 3. ARTS AND RECREATION

Industry	2001	2006	2011	# change (2001-11)
Arts and Recreation Services, nfd ³	89	147	169	80
Heritage Activities, nfd	3	5	6	3
Museum Operation	39	64	73	35
Parks and Gardens Operations	132	218	250	118
Creative and Performing Arts Activities	386	637	731	345
Sports and Recreation Activities, nfd	12	20	23	11
Sports and Physical Recreation Activities	1,120	1,847	2,122	1,002
Horse and Dog Racing Activities	184	303	348	165
Amusement and Other Recreation Activities	1,487	2,454	2,818	1,331
Gambling Activities	1,117	1,843	2,116	999
Total	4,568	7,538	8,657	4,089

Source: SGS Economics & Planning based on ABS Census

3.2 Gold Coast resident workforce

This section profiles the resident workers of the Gold Coast and compares this to the Gold Coast's job profile.

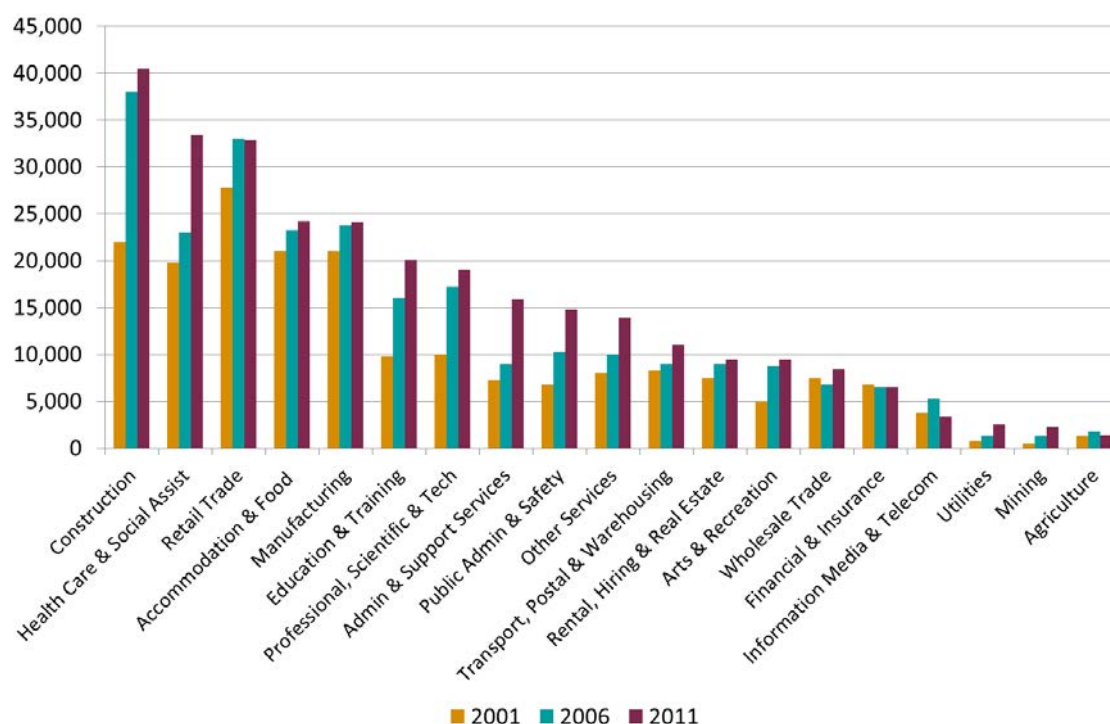
Resident workforce by industry

In 2011, the Retail Trade industry, followed by the Health Care and Social Assistance industry, employed the highest proportion of resident workers (Figure 13). This is particularly interesting as the Health Care and Social Assistance industry is the largest overall employer, indicating that, compared to Retail Trade, a significant number of workers in the Gold Coast Health Care and Social Assistance industry are non-residents. This is in contrast to SEQ and QLD, which both have a higher proportion of resident workers in their respective Health Care and Social Assistance industries.

³ Not further defined

The majority of Gold Coast industries employ similar proportions of resident workers compared to SEQ and QLD. Notable exceptions (employing comparatively higher proportions of resident workers) include Retail Trade, Construction, Accommodation & Food and Arts & Recreation.

FIGURE 13. GOLD COAST RESIDENT WORKFORCE BY INDUSTRY, 2001 TO 2011



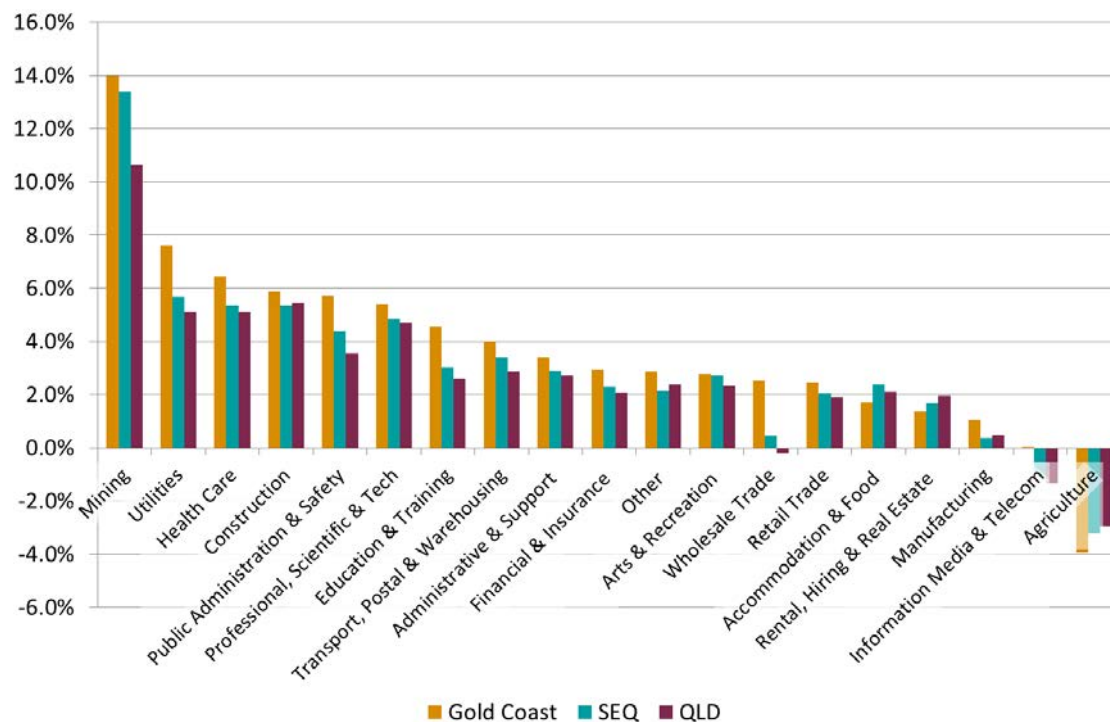
Source: ABS Census 2011, Time Series Profile

Consistent with SEQ and QLD (and overall employment trends), Mining has experienced the highest resident workforce growth rate (Figure 14). Although the majority of employment trends for the resident workforce mirror those of the total workforce, there are some notable exceptions.

Despite lagging SEQ and QLD in terms of total employment growth, the Wholesale Trade industry in the Gold Coast has significantly outperformed both regions in resident workforce employment growth. In fact, the resident workforce employment growth rate of the industry exceeds its own total employment growth rate, indicating a shift towards resident workers within the industry. The Finance & Insurance and Information, Media & Telecommunications industries also exhibit these properties.

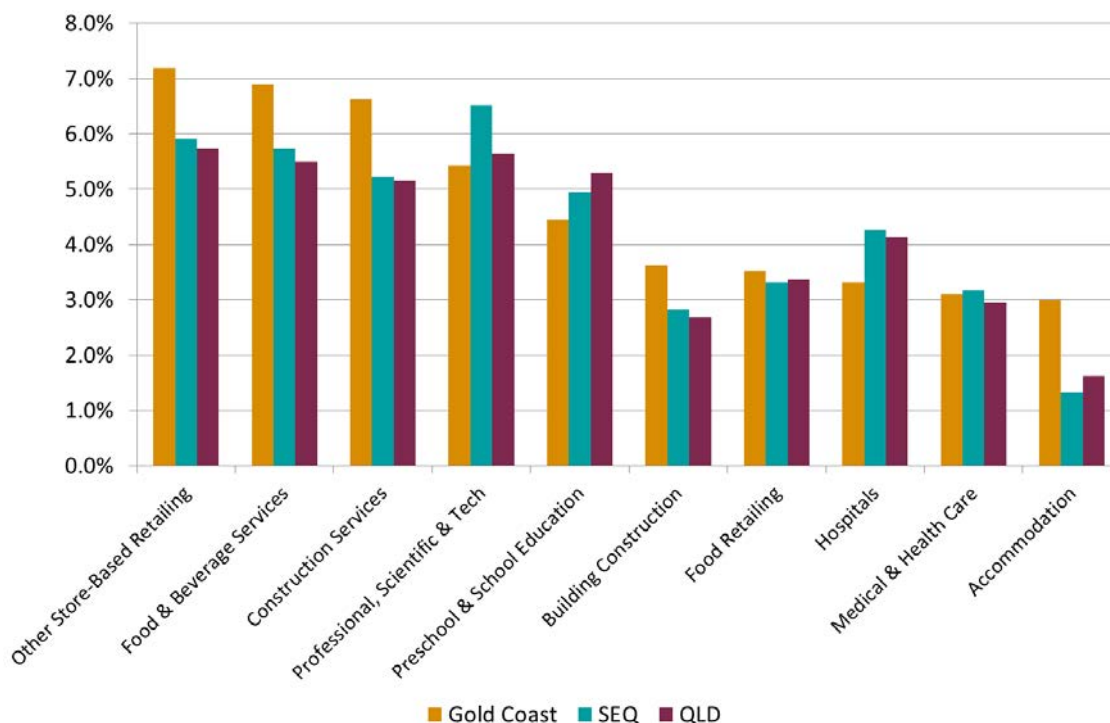
The top 10 industry sectors for the resident workforce of the Gold Coast in 2011 are shown in Figure 15. While the top five industry sectors for resident workers match the jobs (by industry) located in the Gold Coast, the remaining industries varies. Accommodation is a large employing sector for resident workers in the Gold Coast compared to SEQ and QLD, containing three per cent of the workforce in 2011.

FIGURE 14. INDUSTRY AVERAGE ANNUAL GROWTH RATES FOR RESIDENT WORKFORCE, 2001 TO 2011



Source: ABS Census 2011, Time Series Profile

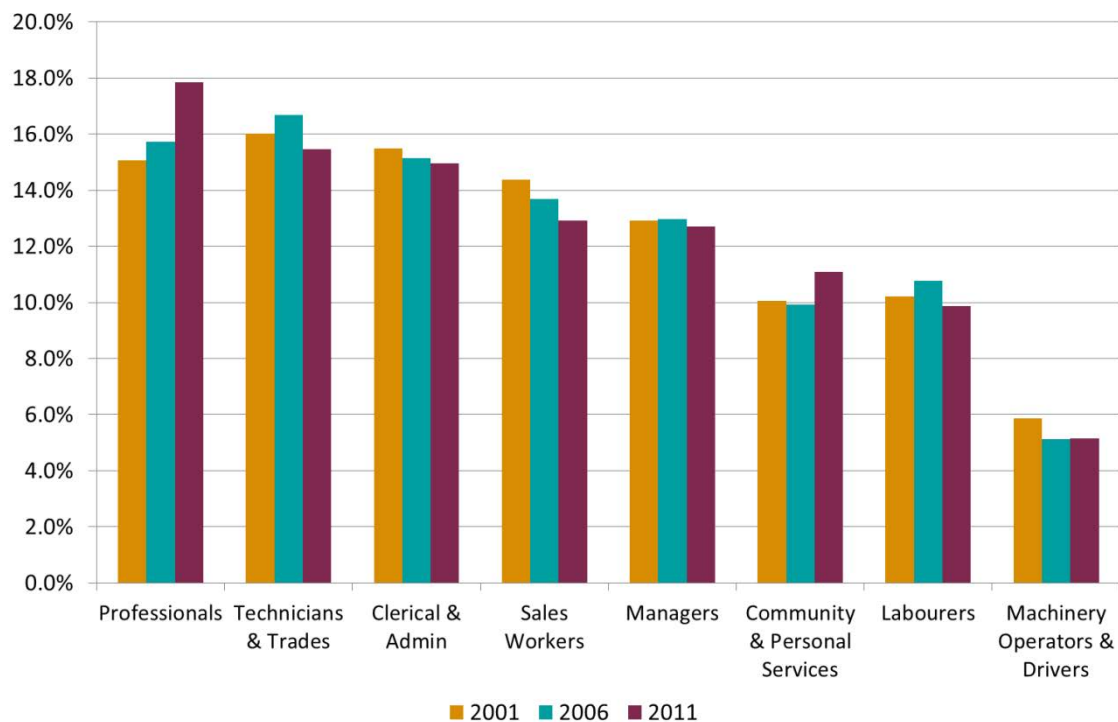
FIGURE 15. TOP 10 INDUSTRY SECTORS FOR GOLD COAST 2011



Source: ABS Census 2011, Time Series Profile

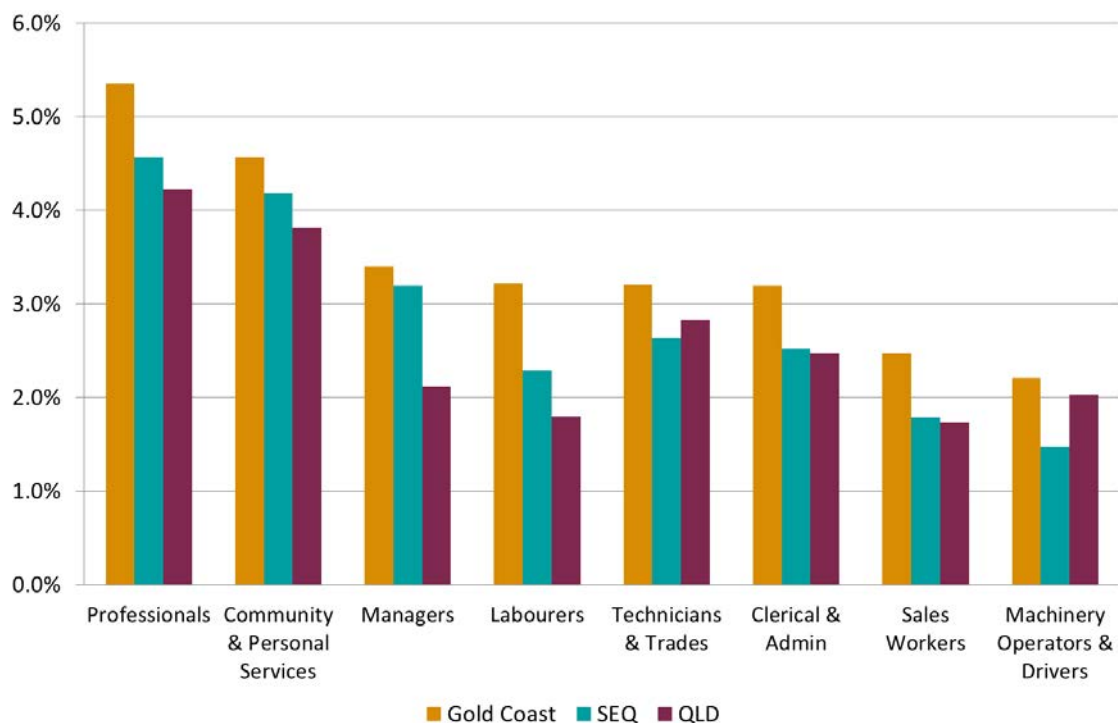
Resident workforce by occupation

FIGURE 16. GOLD COAST RESIDENT WORKFORCE OCCUPATION, 2001 TO 2011



Source: ABS Census 2011, Time Series Profile

FIGURE 17. AVERAGE ANNUAL GROWTH RATES RESIDENT WORKFORCE OCCUPATION, 2001 TO 2011



Source: ABS Census 2011, Time Series Profile

The share of resident workers in each occupation category in the Gold Coast is shown in Figure 16, with the annual growth of each occupation presented in Figure 17. In 2011, Professionals made up the largest share, while Technicians & Trades workers, Clerical & Administrative workers and Sales workers also comprised a large share of resident workers. Professionals and Community & Personal Service workers experienced the strongest growth between 2001 and 2011, greater than the SEQ and QLD averages.

Resident workforce skills

The skills profile of the Gold Coast resident workforce displays significant differences when compared to SEQ and Brisbane. Most notably, the Gold Coast has the lowest share of bachelor and postgraduate qualified residents, but the highest share of skilled labour and unqualified residents (Table 4).

However, the variance between the Gold Coast and other regions is diminishing. Over the 10 year period, the Gold Coast achieved the greatest increase in the share of skilled labour and experienced increases in line with SEQ for postgraduate and bachelor qualifications.

TABLE 4. SKILLS PROFILE OF RESIDENT WORKFORCE

Region	Year	Postgraduate	Bachelor	Skilled labour	Unqualified
Gold Coast	2001	0.9%	7.3%	21.4%	70.3%
	2011	2.2%	10.9%	26.6%	60.4%
	Change	1.2%	3.6%	5.1%	-9.9%
Brisbane	2001	2.6%	14.4%	17.9%	65.0%
	2011	5.4%	20.1%	20.5%	54.0%
	Change	2.7%	5.6%	2.6%	-11.0%
SEQ	2001	1.4%	9.2%	19.0%	70.4%
	2011	3.0%	13.1%	23.8%	60.1%
	Change	1.5%	3.9%	4.8%	-10.3%
QLD	2001	1.2%	8.1%	18.5%	72.2%
	2011	2.4%	11.5%	24.0%	62.0%
	Change	1.2%	3.4%	5.5%	-10.1%

Source: ABS Census 2011, Time Series Profile

Analysing the distribution of skills across industries reveals that industries such as Health Care and Education are far more skills intensive than Retail Trade or Accommodation & Food Services. Postgraduate and bachelor qualified workers are heavily employed by the Health Care, Education and Professional Services industries, while industries such as Construction and Manufacturing have a strong demand for skilled labour.

These observations, along with the shift towards a more highly skilled workforce, are consistent with the high growth and size of industries such as Health Care & Social Assistance, Education & Training, Public Administration & Safety, Professional Services and Construction.

Whilst skill levels appear to be improving, consultation with education institutions and employers highlighted that there remain existing and emerging skills gaps in some specific areas. In particular there are gaps within the following sectors:

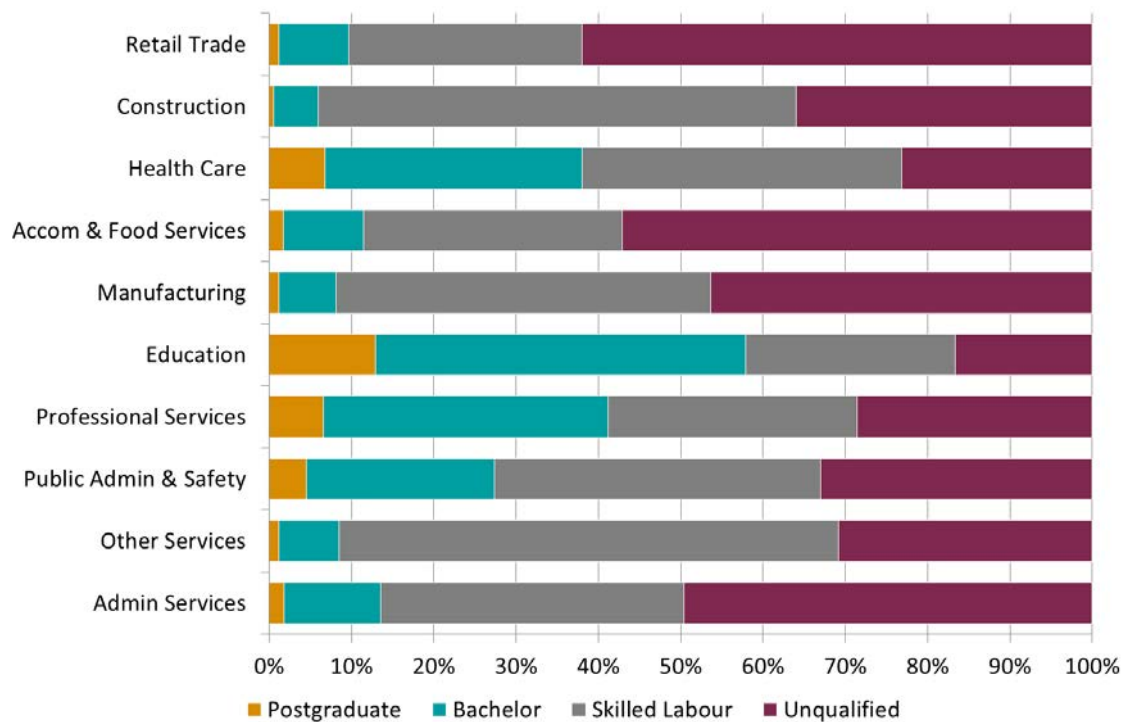
- health (specifically for allied health professionals, dentists and nurses)
- education (due to a rapidly ageing workforce)
- engineering and mining
- retail and recreation (with acute shortages likely during the Commonwealth Games), and
- in the fast changing information and communications technology sector.

During the consultation, it was argued that there is currently no latent demand for university education for Gold Coast residents with those wanting to attend university, who have adequate entry scores, currently able to attend. Rather, the greatest obstacle to improving the skills of the resident workforce was considered to be a lack of clear pathways between education and employment on the Gold Coast. It

is hard to encourage higher educational attainment in a field where there are few employment opportunities in that field.

The consultation also highlighted that there is a tendency for managerial level staff to stay in the same job for extended periods. Whilst this has some benefits it can also lead to stagnation and a lack of innovation. Continued education and on-going life-long learning was considered key to ensuring the ongoing prosperity of existing businesses.

FIGURE 18. SKILLS BY INDUSTRY, GOLD COAST RESIDENT WORKFORCE 2011



Source: ABS Census 2011, Time Series Profile

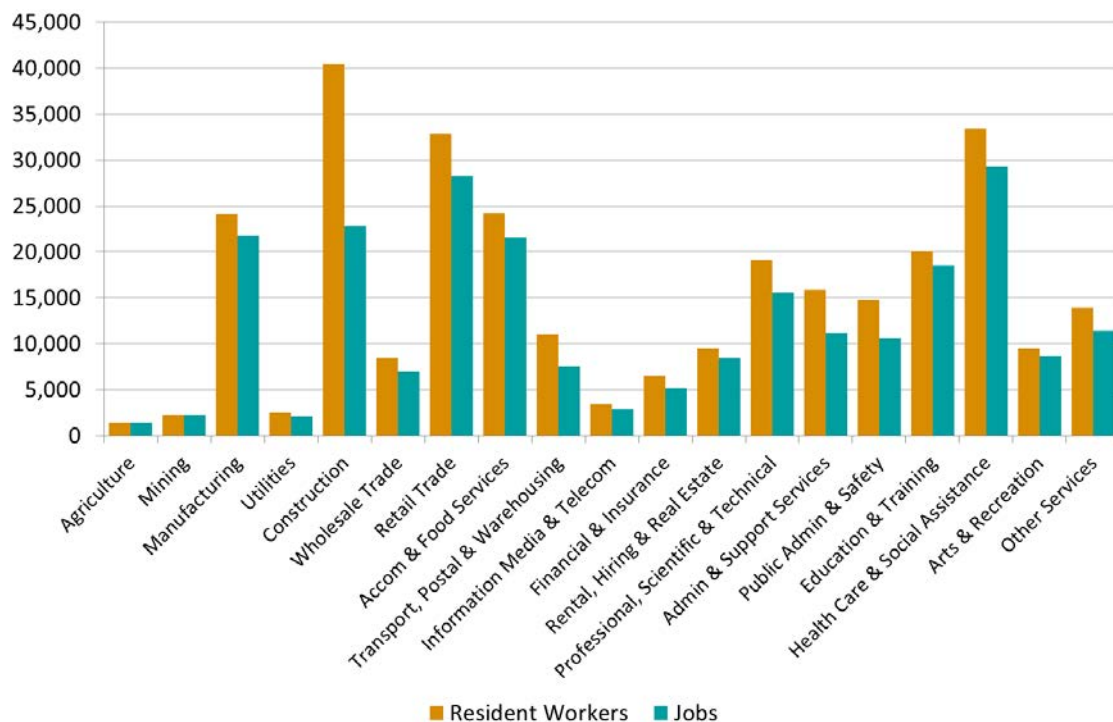
3.3 Alignment of jobs and resident workers

Given the differences in the number of total jobs in the Gold Coast (236,400) and the size of the resident workforce (293,100), this section examines the variation across industries to identify the underlying causes and any trends or patterns.

Figure 19 compares the number of resident workers to the jobs by industry for the Gold Coast in 2011. The most notable differences are in Construction⁴, Retail Trade, Professional services and Health Care industries. A large proportion of the resident workers in these industries leave the Gold Coast to work elsewhere. Factors contributing to this may include a lack of suitable jobs on offer in the Gold Coast and the lifestyle that the Gold Coast offers, meaning that residents are prepared to travel to work (for example, to mining regions) so that they can live on the Gold Coast.

⁴ Due to the nature of the construction industry and the way the ABS Census data is collected there may be some discrepancies in the actual location of these workers across Queensland.

FIGURE 19. RESIDENT WORKERS AND JOBS IN GOLD COAST 2011



Source: SGS Economics & Planning using ABS Census data and ABS Labour Force Survey

An analysis of journey to work patterns reveals that the resident workforce for each industry is sufficient to meet Gold Coast demand (Figure 20). Although some residents are employed outside of the Gold Coast, the majority of employment demand is accommodated by the resident workforce. In this regard, Construction is an industry of note, having the largest net outflow of resident workers. As the resident workforce roughly doubles employment demand, over half the resident workers are employed outside the Gold Coast.

This not only reflects the high demand for construction (and mining) workers in mining regions, including the Bowen Basin and Surat Basin in Queensland and the Pilbara in Western Australia, but also that workers value the Gold Coast's lifestyle and are prepared to travel long distances to work in order to continue living there⁵. Between 2001 and 2011, the number of Gold Coast resident long distance commuter (LDC) workers⁶ nearly doubled indicating the high tendency of Gold Coast residents to travel long distances for work.

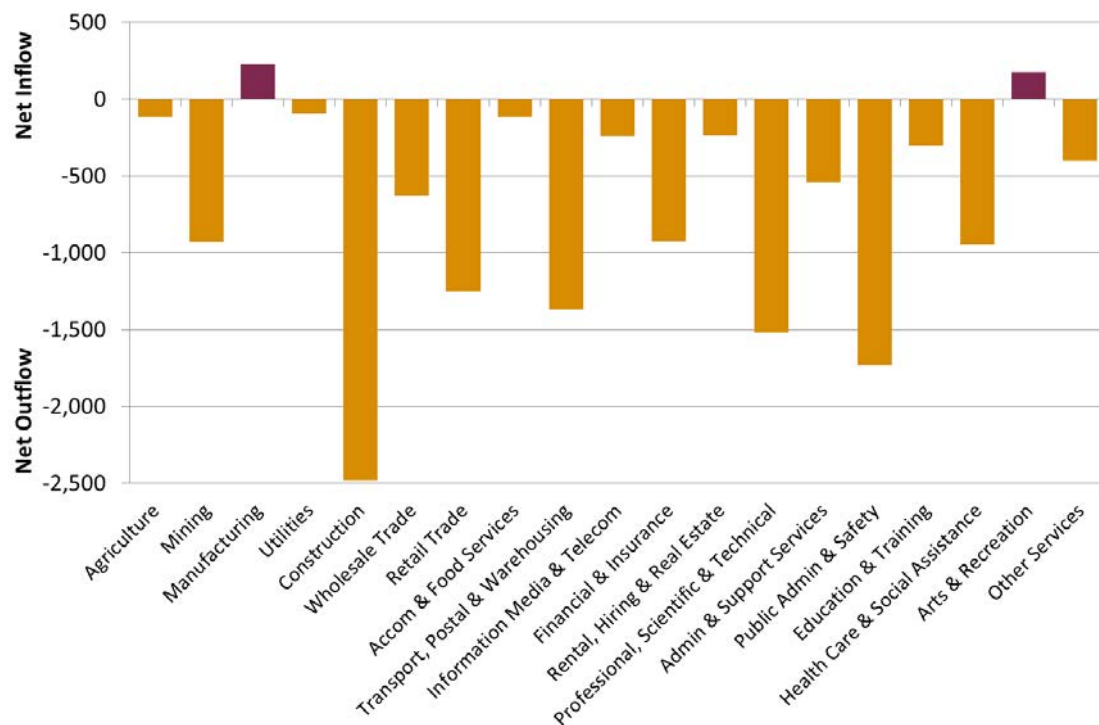
Notably, the Gold Coast supports a resident LDC workforce equivalent to the size of Adelaide's, despite having less than half of Adelaide's total workforce. In addition to these mining regions, Sydney is a common destination for the Gold Coast's LDC workers, particularly for workers in the Transport, Postal & Warehousing industry, as are Melbourne and Brisbane to a lesser extent.

The Manufacturing and Arts & Recreation industries employ the most non-resident workers, having a positive net inflow of workers to the Gold Coast. Higher skilled industries such as Professional, Scientific & Technical services, as well as service based industries of Retail Trade and Public Administration & Safety, have large net outflows of workers. This suggests that there are not enough higher skilled job opportunities in the Gold Coast to meet resident demand.

⁵ KPMG, *Analysis of the Gold Coast Long Distance Commuter Workforce*, August 2013

⁶ LDC workers are defined as those who travel (fly-in/fly-out, drive-in/driver-out, bus-in/bus-out and ship-in/ship-out etc) 100km or more between their place of usual residence and place of work

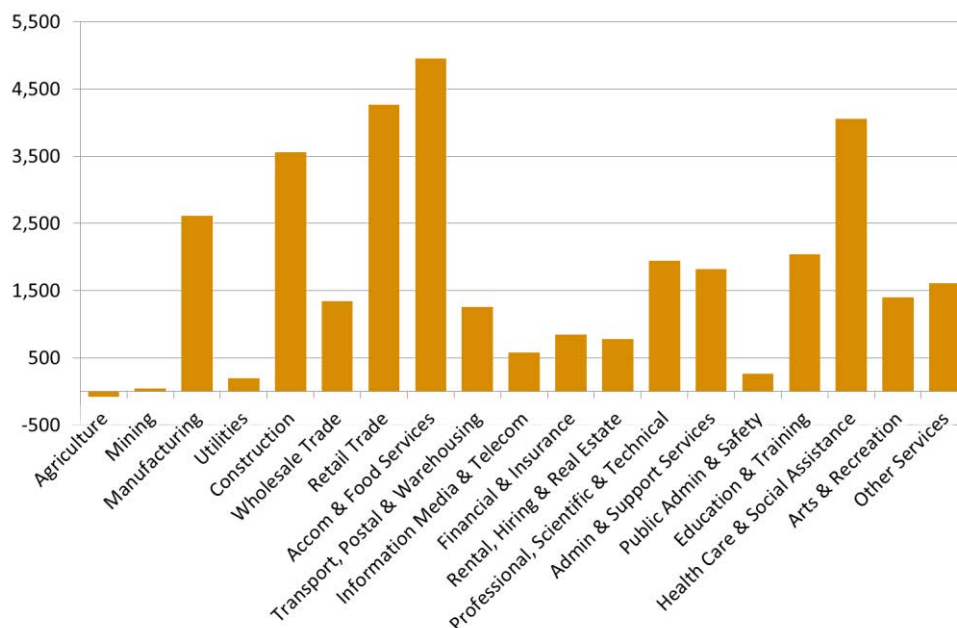
FIGURE 20. JOURNEY TO WORK PATTERNS, 2011



Source: ABS Census 2011

Examination of migration flows by industry shows the industry of employment for those who moved to the Gold Coast during last five years from elsewhere in Australia (Figure 21). The largest inflows of people were employed in the Accommodation & Food Services and Retail Trade industries. Construction, Health Care and Manufacturing industries have also experienced large inflows of people during the last five years, indicating that the current Gold Coast labour force is attracting lower skilled workers rather than more highly educated professionals.

FIGURE 21. NET MIGRATION FLOWS BY INDUSTRY INTO GOLD COAST



Source: ABS Census 2011

3.4 Summary

The largest industry of employment for workers in the Gold Coast is Health Care & Social Assistance, followed by Retail Trade and Construction, all of which are very labour intensive industries. The largest industry sub-sector is services related to tourism, including Store Based Retailing and Food & Beverage Services. The Gold Coast economy is becoming more diverse with Construction Services and Professional, Scientific & Technical Services also large industry sectors. The Gold Coast has experienced strong employment growth in Professionals and Community & Personal Services however there are still barriers to attracting and retaining employees in particular industries, specialisations or at the managerial level.

Within the Gold Coast's resident workforce employment in the Mining industry experienced the greatest level of growth between 2001 and 2011. Notably, these jobs are typically located outside of the Gold Coast. Other significant employing industries include Retail Trade, Health Care, Construction and Accommodation & Food Services. In terms of absolute numbers, the Gold Coast resident workforce comprised mostly Professionals and Community & Personal Service workers. Data also shows that Gold Coast resident workers are less educated than resident workers in Brisbane and SEQ, with a smaller proportion having obtained bachelor or postgraduate qualifications. However, over the last 10 years this has changed, with a large increase in residents with bachelor degrees and skilled labour qualifications.

Consultation revealed that there remain some existing and emerging skills gaps for the region and highlighted the importance of ongoing training and education for existing employees.

There are very few large employers on the Gold Coast. The large number of small and medium business appears to have difficulties (due to their scale of operations) providing their employees with access to professional development opportunities.

4 FUTURE EMPLOYMENT AND SKILLS REQUIREMENTS

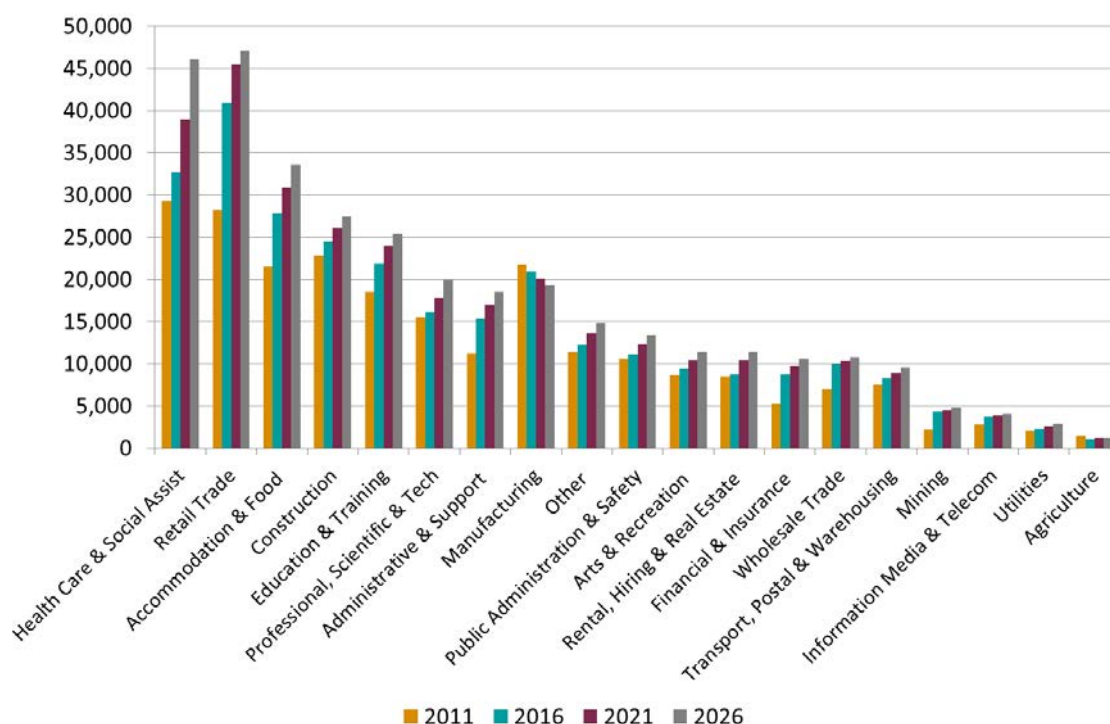
This section presents two future economic growth scenarios – one in which growth continues in line with current industry and employment growth patterns and a second where the Gold Coast increases its share of knowledge economy jobs. This enables an analysis of the Gold Coast’s future skills requirements.

4.1 Base case

Under a business-as-usual scenario (base case) the Gold Coast is expected to see continued employment growth into the future with an additional 95,800 jobs generated from 2011 to 2026 (2.3 per cent growth per annum). Over this period the economy will continue to diversify, predominately into population based service sectors.

Figure 22 presents the industry employment projections at five yearly intervals over the next 15 years to 2026 for the Gold Coast workforce. In 2026 the two largest industries are forecast to be Retail Trade and Health Care & Social Assistance. Accommodation & Food Services and Construction are also forecast to have strong employment growth, as are Professional, Scientific & Technical Services.

FIGURE 22. GOLD COAST INDUSTRY EMPLOYMENT PROJECTIONS



Source: SGS Economics & Planning

Table 5 shows the average annual growth rates by industry from 2011 to 2026 for the Gold Coast as compared to Brisbane, SEQ and QLD. The largest growth rate is forecast for the Mining industry, which is in line with regional trends across QLD. Similarly, forecast growth in Health Care & Social Assistance and

Professional, Scientific & Technical Services for the Gold Coast is on par with growth forecast for Brisbane and QLD. Growth in Retail Trade is forecast to be much stronger in the Gold Coast than in the three comparator regions at 3.5 per cent per annum compared to 0.7 per cent in Brisbane.

TABLE 5. FORECAST AVERAGE ANNUAL GROWTH RATES BY INDUSTRY, 2011 TO 2026

Industry	Gold Coast	Brisbane	SEQ	QLD
Agriculture	-0.9%	1.9%	-0.2%	0.3%
Mining	5.2%	5.1%	6.0%	4.1%
Manufacturing	-0.8%	0.4%	0.2%	0.6%
Electricity, Gas, Water & Waste	2.3%	0.5%	0.9%	0.5%
Construction	1.2%	0.7%	1.3%	1.4%
Wholesale Trade	2.9%	0.6%	1.0%	0.8%
Retail Trade	3.5%	0.7%	0.8%	0.7%
Accommodation & Food	3.0%	2.0%	2.1%	1.9%
Transport, Postal & Warehousing	1.6%	1.3%	1.3%	1.6%
Information Media & Telecom	2.4%	1.0%	1.0%	1.0%
Financial & Insurance	4.8%	2.3%	2.6%	2.4%
Rental, Hiring & Real Estate	2.0%	0.3%	0.6%	0.6%
Professional, Scientific & Tech	1.7%	1.8%	2.0%	1.7%
Administrative & Support	3.4%	1.4%	1.4%	1.3%
Public Administration & Safety	1.6%	0.5%	1.1%	1.7%
Education & Training	2.1%	0.6%	0.8%	0.7%
Health Care & Social Assistance	3.1%	3.5%	4.0%	3.9%
Arts & Recreation	1.8%	2.0%	1.7%	1.4%
Other	1.8%	2.9%	2.1%	1.7%
Total	2.3%	1.5%	1.7%	1.7%

Source: SGS Economics & Planning

Table 6 provides the industry employment projections for Education & Training for the Gold Coast workforce at five yearly intervals to 2026. Under the base case, employment growth is projected to be strongest in population serving areas of education (employment in pre-school and school education) and slower in tertiary education. Harnessing opportunities to improve growth within the tertiary education sector will help to strengthen and grow the Gold Coast's knowledge sector.

TABLE 6. EDUCATION AND TRAINING

Industry	2011	2016	2021	2026
School Education	10,583	12,480	13,712	14,486
Tertiary Education	4,141	4,883	5,365	5,668
Adult, Community and Other Education	2,034	2,398	2,635	2,783
Other Education Services	728	858	943	996
Total	17,485	20,619	22,654	23,934

Source: SGS Economics & Planning

Table 7 provides projections for employment in the knowledge based sector for Gold Coast workers. Accounting Services, General Practice Medical Services and Computer System Design and Related Services are expected to employ the largest number of workers. General Practice Medical Services are projected to experience the biggest increase in employment, while Boatbuilding and Repair Services are expected to experience a reduction in employment.

TABLE 7. KNOWLEDGE BASED SECTOR

Industry	2011	2016	2021	2026	# change (2011-26)
Boatbuilding and Repair Services	1,356	1,304	1,253	1,205	(151)
Engineering Design and Engineering Consulting Services	1,768	1,834	2,028	2,271	503
Management Advice and Related Consulting Services	1,543	1,601	1,770	1,982	439
Legal Services	2,108	2,187	2,417	2,707	599
Accounting Services	3,149	3,267	3,611	4,045	895
Advertising Services	906	939	1,038	1,163	257
Computer System Design and Related Services	2,382	2,471	2,732	3,060	677
Specialised Design Services	672	697	770	863	191
General Practice Medical Services	2,023	2,255	2,690	3,185	1,162
Specialist Medical Services	920	1,026	1,224	1,449	529
Pathology and Diagnostic Imaging Services	851	949	1,132	1,340	489
Total	17,679	18,530	20,665	23,270	5,591

Source: SGS Economics & Planning

The forecast change in the required skills for the Gold Coast (compared to Brisbane, SEQ and QLD) over the next 15 years is shown in Table 8. The projections indicate that there will be a significant requirement for additional workers on the Gold Coast to 2026. Overall, an additional 95,800 workers are required over the next 15 years, an increase of 41 per cent on current levels and equivalent to an average annual growth rate of 2.3 per cent per annum. This is much larger than the future requirements projected for Brisbane, SEQ or QLD, which require increases of between 25 and 28 per cent over the next 15 years.

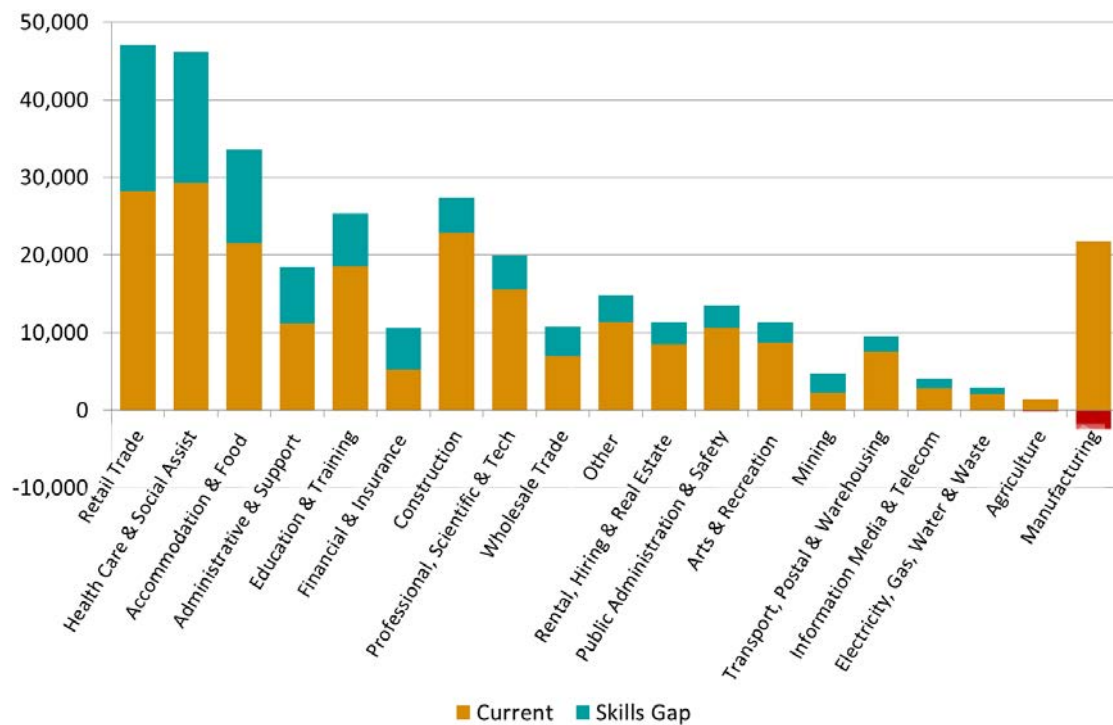
TABLE 8. PROJECTED SKILLS CHALLENGE OVER NEXT 15 YEARS

Region	Current 2011	Future 2026	Future Requirement	Required Increase	Annual Growth Rate
Gold Coast	236,400	332,200	95,800	41%	2.3%
Brisbane	1,074,500	1,341,400	266,900	25%	1.5%
SEQ	1,570,300	2,016,400	446,100	28%	1.7%
QLD	2,297,600	2,942,500	644,900	28%	1.7%

Source: SGS Economics & Planning

The industries projected to have the biggest future skills requirements are presented in Figure 23. The Retail Trade and Health Care & Social Assistance industries have the largest future requirements; it is projected that between 16,800 and 18,800 jobs will need filling over the next 15 years. Accommodation & Food Services, Administrative & Support Services and Education & Training industries also have large future employment forecasts that will need filling by skilled labour in the future. The Manufacturing and Agriculture industries are forecast to decline in overall employment. This indicates that there could be a future surplus of workers with skills relevant to those industries that may require retraining.

FIGURE 23. PROJECTED FUTURE SKILL REQUIREMENTS, GOLD COAST IN 2026

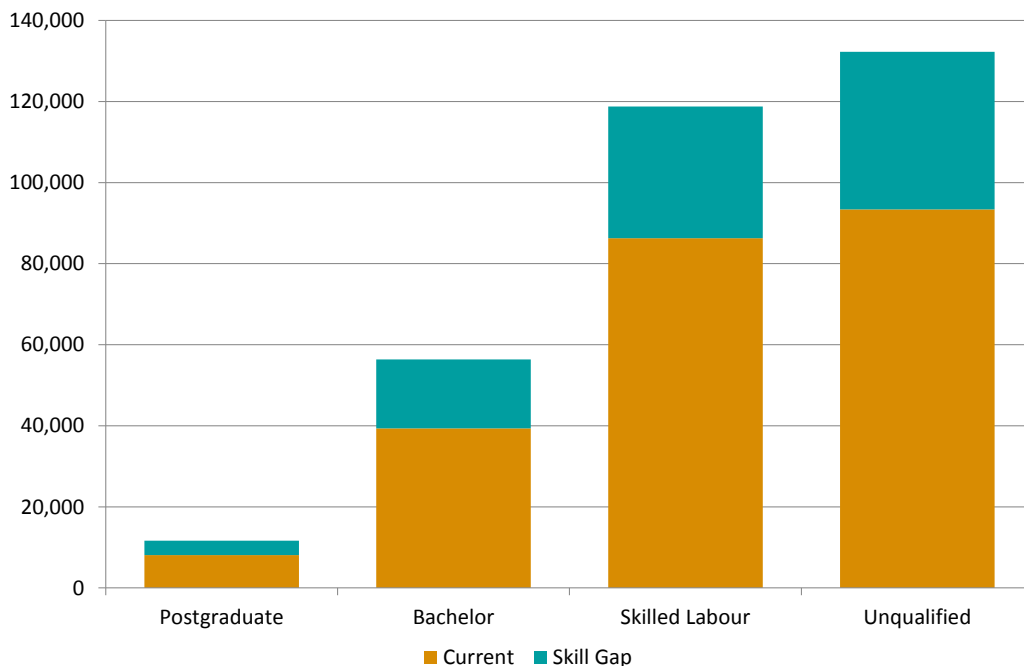


Source: SGS Economics & Planning

Consultation highlighted that under the business-as-usual scenario particular shortages for Health Care & Social Assistance would be experienced by allied health professionals, nurses and dentists. There would also continue to be a shortage of well trained customer service staff in Retail Trade, Accommodation & Food and other industries with a strong customer service focus. Shortages are also likely for the education workforce, which is ageing rapidly, the information and communications technology sector and engineering and mining sectors.

The Gold Coast is projected to experience a small increase in the proportion of highly skilled workers (with postgraduate and bachelor degrees), albeit smaller than in Brisbane and the wider SEQ region. The biggest changes to the skills profile of the Gold Coast labour force are projected to occur in unqualified and skilled labour.

FIGURE 24. CHANGE IN SKILLS PROFILE, 2011 TO 2026



Source: SGS Economics & Planning

4.2 Alternative scenario - A more diverse advanced business services focused economy

An alternative scenario of future employment on the Gold Coast has been developed to illustrate the potential skills requirements related to a shift toward an even more diverse knowledge based economy. This scenario considers the skill requirements if there was a diverse advanced business services focused economy which has a more complex need for skilled labour.

This would be a 'stepped change' from the current trend. Under this scenario it is anticipated that the future employment profile of the Gold Coast will be more like the current employment profile of Brisbane.

This involves increasing the share of the higher skilled, knowledge intensive and higher value adding industries including Transport, Postal & Warehousing, Information Media and Telecommunications, Professional, Scientific and Technical Services, Health Care and Social Assistance and Public Administration and Safety. The lower skilled industries of Rental, Hiring and Real Estate Services and Administrative and Support Services would see a decrease in share of total employment. The remaining industries experience small adjustments to keep the overall total jobs in the Gold Coast fixed to base case levels in the future.

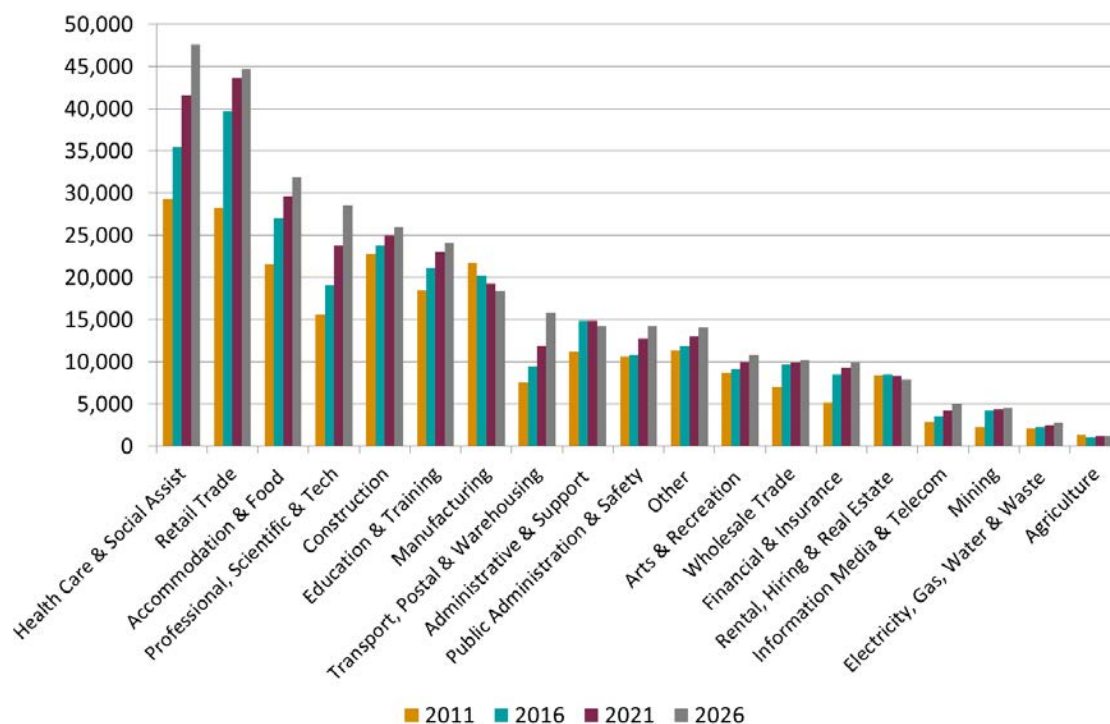
Consultation with government and industry highlighted particular industries on the Gold Coast with growth potential. If successfully developed these industries could contribute to the realisation of the alternative scenario. Particular areas of opportunity were considered to be:

- Manufacturing – transition from traditional low skilled manufacturing to niche sectors and a focus on research and development, particularly for motor sports, marine, food processing, construction based manufacturing and pharmaceuticals
- Event management – with a particular focus on corporate, health and education tourism
- Education – potential to become an 'education city' and education exporter
- Film and television – potential to reposition sector to focus on small screen and online content creation

- Health sector – an education and training opportunity for health care professionals for multi-skilling and up-skilling in this sector
- Sports – leverage off the Commonwealth Games, and
- Sustainability – leverage off the already significant skills for climate change adaptation.

The number of jobs by industry under the alternative scenario from 2011 to 2026, in five yearly intervals, is shown in Figure 25. In 2026 the largest employing industry in the Gold Coast is projected to be Health Care & Social Assistance with an estimated 47,500 jobs. Retail Trade is also forecast to be a large industry with approximately 44,700 jobs in 2026. Accommodation & Food Services, Professional, Scientific & Technical Services and Construction are the next largest industries with a forecast of between 26,000 and 32,000 jobs.

FIGURE 25. ALTERNATIVE SCENARIO GOLD COAST INDUSTRY EMPLOYMENT PROJECTIONS



Source: SGS Economics & Planning

Table 9 presents the forecast average annual growth rates by industry from 2011 to 2026 under the alternative scenario, compared to the Gold Coast base case, Brisbane, SEQ and QLD. Most notably, growth under the alternative scenario in the Professional, Scientific & Technical services, Transport, Postal & Warehousing and Information, Media & Telecommunications industries is much stronger compared to the base case. Growth in the Health Care & Social Assistance industry is marginally higher than the base case, however still lower than Brisbane and SEQ. Growth in Mining and Retail Trade is lower than compared to the base case, with employment diversifying into other industries.

TABLE 9. FORECAST AVERAGE ANNUAL GROWTH RATES BY INDUSTRY, 2011 TO 2026

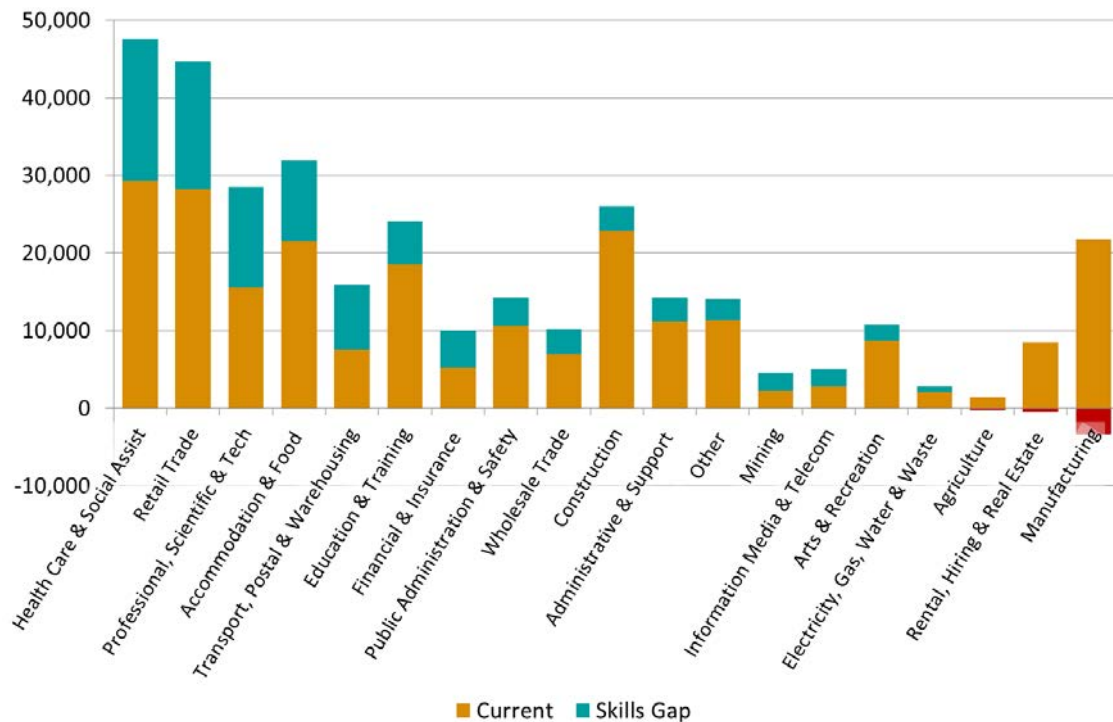
Industry	Gold Coast		Brisbane	SEQ	QLD
	Alternative Scenario	Base Case			
Agriculture	-1.2%	-0.9%	1.9%	-0.2%	0.3%
Mining	4.8%	5.2%	5.1%	6.0%	4.1%
Manufacturing	-1.1%	-0.8%	0.4%	0.2%	0.6%
Electricity, Gas, Water & Waste	2.0%	2.3%	0.5%	0.9%	0.5%
Construction	0.9%	1.2%	0.7%	1.3%	1.4%
Wholesale Trade	2.6%	2.9%	0.6%	1.0%	0.8%
Retail Trade	3.1%	3.5%	0.7%	0.8%	0.7%
Accommodation & Food	2.7%	3.0%	2.0%	2.1%	1.9%
Transport, Postal & Warehousing	5.1%	1.6%	1.3%	1.3%	1.6%
Information Media & Telecom	3.9%	2.4%	1.0%	1.0%	1.0%
Financial & Insurance	4.5%	4.8%	2.3%	2.6%	2.4%
Rental, Hiring & Real Estate	-0.4%	2.0%	0.3%	0.6%	0.6%
Professional, Scientific & Tech	4.1%	1.7%	1.8%	2.0%	1.7%
Administrative & Support	1.6%	3.4%	1.4%	1.4%	1.3%
Public Administration & Safety	2.0%	1.6%	0.5%	1.1%	1.7%
Education & Training	1.8%	2.1%	0.6%	0.8%	0.7%
Health Care & Social Assistance	3.3%	3.1%	3.5%	4.0%	3.9%
Arts & Recreation	1.5%	1.8%	2.0%	1.7%	1.4%
Other	1.4%	1.8%	2.9%	2.1%	1.7%
Total	2.3%	2.3%	1.5%	1.7%	1.7%

Source: SGS Economics & Planning

Consultation highlighted that, in addition to the shortages identified under the base case, there are also likely to be particular gaps in research and development capabilities, skills in the information and communications technology sector and in more specialised construction skills.

Similar to the base case, Figure 26 shows the projected future skills requirements by industry under the alternative scenario. Again, Retail Trade and Health Care & Social Assistance industries have the largest future requirements of between 16,400 and 18,300 additional jobs. However, under this scenario there are also large future requirements that need to be met in the Professional, Scientific & Technical Services, Transport, Postal & Warehousing and Accommodation & Food Services industries. The skills required by these industries are typically obtained via bachelor and postgraduate qualifications typical of Professionals and Managerial occupations.

FIGURE 26. PROJECTED FUTURE SKILLS REQUIREMENTS, ALTERNATIVE SCENARIO
GOLD COAST IN 2026



Source: SGS Economics & Planning

4.3 Population and export focused jobs

Table 10 below shows population driven and export focused jobs for both the base case and alternative scenario. It shows that most jobs on the Gold Coast will be population driven in the future, reflecting that many jobs (such as retail) are, by their very nature, harder to export. Alternatively, jobs such as those in professional services are easier to export.

Table 11 further reflects that future jobs on the Gold Coast are projected to be population driven. It shows that it is harder for labourers to export outside of a local region, while other employment is more easily exported outside of a region, as is the case with professionals and managers. These tables should be seen as indicative breakdowns only for each industry, but the total provides an insight into the population and export focused jobs split on the Gold Coast.

TABLE 10. POPULATION AND EXPORT FOCUSED JOBS GROWTH 2011 TO 2026

Industry	Base case		Alternative scenario	
	Population driven	Export focused	Population driven	Export focused
Agriculture	-	-	-	-
Mining	1,200	1,300	900	1,300
Manufacturing	-	-	- 3,400	-
Electricity, Gas, Water and Waste Services	800	-	700	-
Construction	4,400	200	3,000	200
Wholesale Trade	3,400	400	2,800	400
Retail Trade	18,500	400	16,100	400
Accommodation & Food	7,200	4,800	5,500	4,800
Transport & Warehousing	1,900	100	8,000	400
Information Media and Telecommunications	1,100	100	2,000	200
Financial & Insurance	5,100	300	4,500	300
Rental, Hiring & Real Estate Services	2,900	200	- 700	200
Professional, Services	4,000	400	11,600	1,300
Administrative Services	6,600	700	2,400	700
Public Admin. & Safety	2,700	100	3,600	100
Education and Training	5,900	1,000	4,600	1,000
Health Care & Social Assistance	16,000	800	17,400	900
Arts & Recreation Services	1,600	1,100	1,000	1,100
Other Services	3,200	200	2,400	200
Total	86,400	12,100	82,400	13,400

Source: SGS Economics & Planning

TABLE 11. POPULATION AND EXPORT FOCUSED JOBS GROWTH 2011 TO 2026

Occupation	Base case		Alternative scenario	
	Population driven	Export focused	Population driven	Export focused
Not stated	95%	5%	95%	5%
Inadequately described	95%	5%	95%	5%
Machinery Operators and Drivers	95%	5%	95%	5%
Labourers	99%	1%	99%	1%
Community and Personal Service Workers	98%	2%	98%	2%
Managers	80%	20%	70%	30%
Technicians and Trades Workers	90%	10%	90%	10%
Sales Workers	95%	5%	95%	5%
Clerical and Administrative Workers	90%	10%	90%	10%
Professionals	70%	30%	65%	35%
Total	88%	12%	86%	14%

Source: SGS Economics & Planning

4.4 Skills requirements and potential challenges

The dynamics between the existing workforce skills, current and future requirements and the Gold Coast's ability to meeting these challenges is very complex. A small misalignment in a specific niche/specialised sector could have a significant impact on the broader economy. More general skills requirements across major growth sectors, such as the health sector, need to be managed appropriately.

The following table seeks to highlight some existing and potential future requirements and provide some assessment as to the Gold Coast’s ability to meet these requirements.

TABLE 12 EXISTING AND POTENTIAL FUTURE SKILLS CHALLENGES

Selected occupations/industries	Existing skill requirements	Potential skill requirements	Ability to meet requirements	Comments
Specialised skills				
Specialised doctors/health professionals (i.e. dentistry, specialist medical services, pathology and diagnostic imaging services)	X	X	Hard	Given the size of the Gold Coast economy it can be difficult delivering and retaining skills in specialised sectors of the economy. Typically there is insufficient depth in the economy to provide job security and growth potential.
Engineering design and engineering consulting services	X	X	Hard	
Management advice and related consulting services	X	X	Hard	
Computer system design and related services	X	X	Moderate	
Event management	-	X	Moderate	
Niche, R&D focused, advanced manufacturing	X	XX	Hard	
Specialised construction skills (i.e. electricians)	X	X	Moderate	
Senior management roles	X	X	Hard	
Higher education skills (i.e. bachelor/ postgraduate)				
Doctors	-	-		An old and aging workforce combined with strong projected future growth is likely to lead to possible shortages in the future.
Nurses	-	XX	Moderate	
Teachers	-	X	Moderate	An existing old and aging workforce could result in future shortages
ICT workers	X	XX	Hard	As the industry is quickly evolving and is highly specialised there is insufficient depth in the Gold Coast economy to support the full range of services effectively.

Selected occupations/industries	Existing skill requirements	Potential skill requirements	Ability to meet requirements	Comments
Skilled labour (Certificate)				
Allied health/support sector	X	XX	Moderate	This sector is expected to grow significantly in the future. A challenge will be ensuring there are sufficient skilled workers to meet requirements.
Construction workers	S	-	-	The slow down (post-GFC) in the residential sector has resulted in a surplus in general construction workers. This is unlikely to be an ongoing issue given the workforce is old and aging and residential development is likely to strengthen in the future given strong population forecasts.
Unqualified				
Retail/ Accommodation/ Recreation Services	XX	XX	Easy	Tourism will remain a dominant component of the Gold Coast economy, however, due to the profile of the existing workforce this challenge should be achievable. Increased demand as a result of the Commonwealth Games may require temporary additional skills.
Manufacturing	S	S	-	Traditional manufacturing is shifting toward hi-tech/value add operations or logistics and warehousing operations resulting in a likely surplus of traditional low-skilled manufacturing workers.

XX - significant shortage
X - emerging shortage
- - no shortage
S - surplus of skills

5 RECOMMENDATIONS

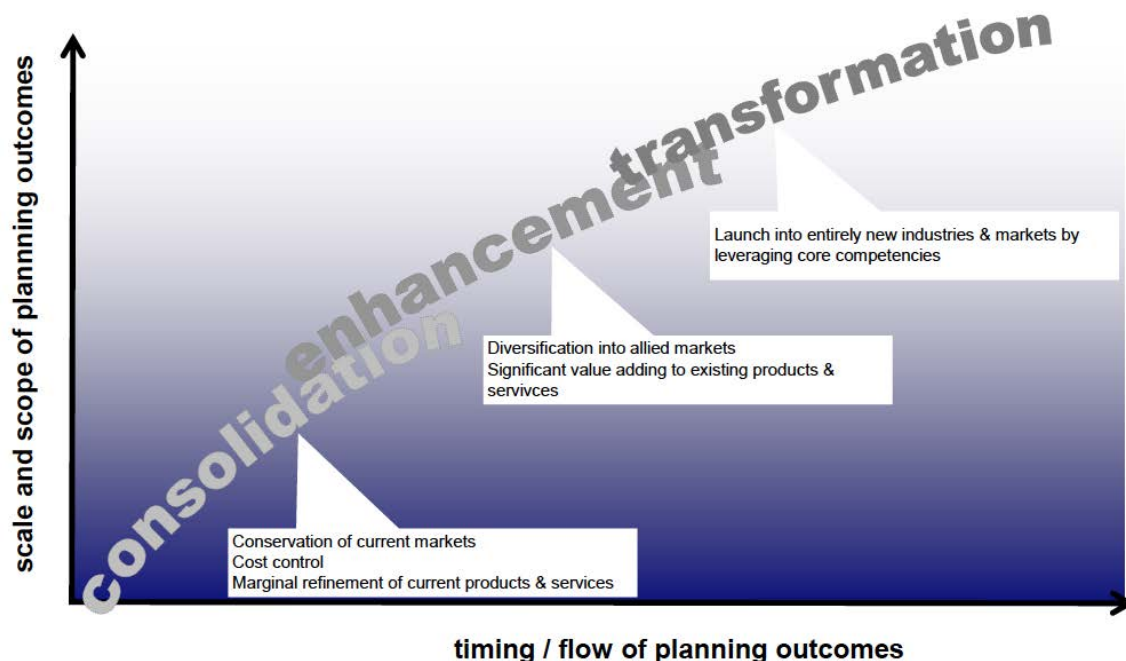
As outlined above, skills requirements for the Gold Coast cannot be considered in isolation but must be done so in the context of the region's broader economic development objectives. As such, the following recommendations consider both economic development opportunities as well as ways to skill existing residents and attract new residents to achieve a more diverse and resilient economy.

First, is a brief discussion of planning to three horizons. This stepped approach to strategic planning provides a theoretical framework to assist the Gold Coast to shape its economic future.

5.1 Planning to three horizons

All successful businesses, and communities, need to plan to three horizons if they are to maintain competitiveness and prosperity over the long run (Figure 27). For a firm, the first horizon is usually focused on the near term and on current core business, that is, already established customers and income earners. The imperative here is to take care of the basics of competitiveness, cost control, effective pricing, careful monitoring of the market for demand shifts, maintenance of infrastructure, teamwork and workforce cohesion and day to day risk management.

FIGURE 27. THREE HORIZONS APPROACH TO STRATEGIC PLANNING



Source: Constructed from ideas set out in Baghai, Coley and White (1999).

In a regional economic development context, such as the Gold Coast, the first horizon concerns making the most of the existing workforce skills available and leveraging off these. It encompasses identifying the economic strengths of the region and capitalising on the skills and industries already within the Gold Coast and simply being responsive and helpful when investment enquiries come along.

The second horizon stretches the region's aspirations to include leveraging existing markets and competencies to move into allied business areas. This includes adding value to existing economic

strengths through diversification and forming strategic alliances. In the case of the Gold Coast, the region's outstanding strengths in higher education, for example, could enable accelerated development of new export earners providing advisory services in value chain optimization, and taking advantage of the R&D and health sector expertise held by Bond University and other institutions in the area.

The third horizon is generally longer term and involves strategies to re-equip or re-configure the region so that it reaches into entirely new markets, though still building on inherent competencies, infrastructures and networks. This horizon aspires to *transformation* of an economy. This is not a theoretical or rhetorical proposition. For example, in Melbourne, the current economic structure, based as it is on high value added services, high tech manufacturing, education and a rich hospitality, events and tourism offer, is virtually unrecognizable from what were once characterized as *rust belt* industries in the early 1980s. This revolution in economic structure and performance occurred over a longer time horizon and through planning and infrastructure investment, not by chance.

Importantly, regions must work to all three horizons *simultaneously*. Those communities that are focused solely on the basics and the immediate issues of the day will miss opportunities to grow. Meanwhile, those that dedicate themselves solely to blue sky plans will be at risk of losing some of their mainstay industries; their competitiveness may be eroded by avoidable cost pressures stemming from poor administration of regulations or infrastructure failures.

5.2 Recommendations

Existing business development

No.	Recommendation	Actions	Timeframe				Potential partners
			Short (1-2 yr)	Medium (3-5 yr)	Long (5+ yr)	Ongoing	
1.1	Facilitate access to skills enhancement and business development opportunities.	1.1.1 Deliver comprehensive local business information, advisory and referral services through the establishment and operation of a Gold Coast Business Links Centre - a one-stop-shop for business information and support services and referrals to other agencies and organisations.		x			City of Gold Coast Department of Education, Training and Employment Department of Education, Employment and Workplace Relations
		1.1.2 Establish a program for business training, mentoring, investment support, workplace relations, promotion and development for local small to medium-sized enterprises (SMEs), micro-businesses and home-based businesses.	x				City of Gold Coast
1.2	Advocate private and public capital opportunities.	1.2.1 Work with the State Government to secure the location of selected State or Federal Government activities to the Gold Coast.		x	x		Queensland Government Commonwealth Government
		1.2.2 Explore opportunities that the Gold Coast light rail might unlock. For example, different styles of residential and commercial development, branding the city, attract skilled labour and activating station precincts.	x				City of Gold Coast Queensland Government
		1.2.3 Work with the private sector to identify development opportunities and help facilitate their delivery (e.g. business case preparation). This might include determining the number of workers required to achieve critical mass in particular industries on the Gold Coast and developing methods to build these industries.				x	Department of State Development, Infrastructure and Planning
		1.2.4 Explore opportunities to leverage off existing tourism assets.					
1.3	Improve understanding of existing and future	1.3.1 Undertake a more fine grained analysis of current and future skills shortages. For example, the health sector has	x				City of Gold Coast

No.	Recommendation	Actions	Timeframe				Potential partners
			Short (1-2 yr)	Medium (3-5 yr)	Long (5+ yr)	Ongoing	
	skills shortages	been identified as having skills shortages, however the need for specific skills varies within the sector. The Pathology and Diagnostic Imaging Services sector has been highlighted as a sector that has potential for ongoing growth.					
1.4	Making business easy	1.4.1 Having regular dialogue between the public and private sector to ensure a streamlined regulatory environment.				x	Department of State Development, Infrastructure and Planning
		1.4.2 Support innovation in business throughout the Gold Coast by enhancing connections and better linking research and business communities. Establish commercialisation partnerships between local firms focused on furthering commercialisation of innovation out of Gold Coast universities.					

New business investment

No.	Recommendation	Actions	Timeframe				Potential partners
			Short	Medium	Long	Ongoing	
2.1	Market and promote the Gold Coast and its potential to the business and investment communities and government funding bodies.	2.1.1 Maintain and disseminate, for the information of prospective investors, key economic performance indicators for the City of Gold Coast and the wider region. E.g. why invest in the Gold Coast.				x	City of Gold Coast
		2.1.2 Build on capabilities in the Health Care sector. Employ strategies to attract more health care professionals to live and work on the Gold Coast.	x	x			City of Gold Coast Health care sector
		2.1.3 Build on capabilities in the Education sector. Employ strategies to attract more students to live and work on the Gold Coast.	x	x			City of Gold Coast Higher education providers
		2.1.4 Build on capabilities in sectors identified as having growth potential, including Engineering Design and Engineering Consulting Services and Computer System Design and Related Services.					
		2.1.5 Develop a clear 'story' to sell the strengths and challenges of the Gold Coast to government.	x				City of Gold Coast
		2.1.6 Talk to businesses not located on the Gold Coast about barriers to locating or investing on the Gold Coast. For example, the Advertising Services and Management and Consulting Services sectors have been identified as sectors with potential; while these sectors have some mass on the Gold Coast discussion with businesses could identify ways to build these sectors.	x				City of Gold Coast
2.2	Facilitate targeted economic development opportunity.	2.2.1 Commonwealth Games – identify ways to leverage off the skills and intellectual capital in the Gold coast during the Commonwealth Games.		x			City of Gold Coast Gold Coast Commonwealth Games Corporation
		2.2.2 Investigate need for a business incubator on the Gold Coast to support the development of new and emerging	x				City of Gold Coast

		industries.				
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Industry development

No.	Recommendation	Actions	Timeframe				Potential partners
			Short	Medium	Long	Ongoing	
3.1	Develop and maintain relationships with local industries.	3.1.1 Convene a high-level annual Gold Coast Regional Business and Economic Development Forum. The forum would highlight pertinent economic and community development challenges and opportunities and showcase achievements throughout Gold Coast and the region. The forum would involve prominent speakers who would be invited to speak on matters of strategic importance to the Gold Coast and to engage local and regional economic development stakeholders, from industry and government, in productive discussion and debate on matters of importance. Refer to Recommendation 1.1.	x	x			City of Gold Coast
3.2	Develop and maintain inter-governmental economic development relationships.	3.2.1 Establish Gold Coast Regional Economic Development Advisory Group, to provide a forum for RDA Gold Coast, Gold Coast City Council, State and Federal agencies, business representatives and institutions (e.g. health and education) to engage in communication and information exchange on the region's economic development matters and to agree on priorities. The advisory group would work at the coalface of local and regional economic development matters, and would act as an important voice for Gold Coast and the region, to lobby government on pertinent economic development issues and opportunities for the region in a considered, collaborative and strategic fashion.	x	x			City of Gold Coast

Regional Workforce Development

No.	Recommendation	Actions	Timeframe				Partners
			Short	Medium	Long	Ongoing	
4.1	Boosting productivity of the workforce	4.1.1 Establish a Gold Coast Regional Workforce Development Working Group to critically evaluate local skills training priorities and to establish a co-ordinated strategic response.	x	x			City of Gold Coast Professional associations
		4.1.2 Establish support schemes that better link highly skilled workers with high value added businesses. Host events, such as a Careers Fair or field days, which provide opportunities for employers and potential employees to engage.	x	x			City of Gold Coast Professional associations
		4.1.3 Establish a scheme to more effectively encourage workplace training for all workers or allow skill upgrades while working.		X			Professional associations
		4.1.4 Enhance connections between schools, tertiary institutions and workplaces to better prepare future workers with industry relevant skills. Engage with secondary students in regional and rural locations to encourage participation in tertiary or further education/learning.		x			City of Gold Coast Secondary schools Higher education providers

Infrastructure Needs

No.	Recommendation	Actions	Timeframe				Partners
			Short	Medium	Long	Ongoing	
5.1	Identify future infrastructure needs of industry and business and determine funding and implementation options.	<p>5.1.1 Undertake a City of Gold Coast Infrastructure Audit and survey the needs of the City's business and industry. Use this information to help inform Council's infrastructure planning and delivery programs and to lobby the other spheres of government regarding Gold Coasts critical infrastructure needs. The audit will be used to inform funding applications to the State and Federal governments for Gold Coasts critical infrastructure requirements. Particular attention will be paid to:</p> <ul style="list-style-type: none"> – The emerging digital economy, broadband capacity and the National Broadband network (NBN) – Transport infrastructure, including public transport – Tourism infrastructure – Community infrastructure (e.g. sporting and recreation facilities) – Health, and – Education. 	x				City of Gold Coast
5.2	Advocate appropriate information and communications technology (ICT) infrastructure to support industry and business.	5.2.1 Facilitate rollout of the National Broadband Network (NBN).				x	NBNCo City of Gold Coast
		5.2.2 Develop a City of Gold Coast Digital Strategy.		x			City of Gold Coast

APPENDIX A: RANKED INDUSTRY SECTOR

TABLE 13. LIST OF 2 DIGIT INDUSTRIES RANKED IN ORDER OF 2011 GOLD COAST INDUSTRY SHARE OF JOBS

Rank	1 Digit Industry	2 Digit Industry
1	Retail Trade	Other Store-Based Retailing
2	Accommodation and Food Services	Food and Beverage Services
3	Construction	Construction Services
4	Professional, Scientific and Technical Services	Professional, Scientific & Tech Services
5	Education and Training	Preschool and School Education
6	Health Care and Social Assistance	Hospitals
7	Health Care and Social Assistance	Medical & Other Health Care Services
8	Retail Trade	Food Retailing
9	Construction	Building Construction
10	Public Administration and Safety	Public Administration
11	Administrative and Support Services	Administrative Services
12	Rental, Hiring and Real Estate Services	Property Operators and Real Estate Services
13	Accommodation and Food Services	Accommodation
14	Health Care and Social Assistance	Social Assistance Services
15	Other Services	Personal and Other Services
16	Arts and Recreation Services	Sports and Recreation Activities
17	Other Services	Repair and Maintenance
18	Health Care and Social Assistance	Residential Care Services
19	Transport, Postal and Warehousing	Road Transport
20	Administrative and Support Services	Building Cleaning, Pest Control and Other Support Services
21	Education and Training	Tertiary Education
22	Public Administration and Safety	Public Order, Safety and Regulatory Services
23	Manufacturing	Food Product Manufacturing
24	Manufacturing	Transport Equipment Manufacturing
25	Manufacturing	Manufacturing, nfd
26	Professional, Scientific and Technical Services	Computer System Design and Related Services
27	Financial and Insurance Services	Finance
28	Wholesale Trade	Other Goods Wholesaling
29	Manufacturing	Fabricated Metal Product Manufacturing
30	Arts and Recreation Services	Gambling Activities
31	Education and Training	Adult, Community and Other Education
32	Financial and Insurance Services	Auxiliary Finance and Insurance Services
33	Manufacturing	Machinery and Equipment Manufacturing
34	Retail Trade	Motor Vehicle and Motor Vehicle Parts Retailing
35	Construction	Heavy and Civil Engineering Construction
36	Rental, Hiring and Real Estate Services	Rental and Hiring Services (except Real Estate)
37	Manufacturing	Furniture and Other Manufacturing
38	Wholesale Trade	Basic Material Wholesaling
39	Manufacturing	Wood Product Manufacturing

40	Manufacturing	Textile, Leather, Clothing and Footwear Manufacturing
41	Manufacturing	Primary Metal and Metal Product Manufacturing
42	Retail Trade	Retail Trade, nfd
43	Manufacturing	Non-Metallic Mineral Product Manufacturing
44	Wholesale Trade	Machinery and Equipment Wholesaling
45	Health Care and Social Assistance	Health Care and Social Assistance, nfd
46	Mining	Non-Metallic Mineral Mining and Quarrying
47	Transport, Postal and Warehousing	Postal and Courier Pick-up and Delivery Services
48	Wholesale Trade	Grocery, Liquor and Tobacco Product Wholesaling
49	Agriculture, Forestry and Fishing	Agriculture
50	Transport, Postal and Warehousing	Transport Support Services
51	Manufacturing	Printing (including the Reproduction of Recorded Media)
52	Construction	Construction, nfd
53	Electricity, Gas, Water and Waste Services	Water Supply, Sewerage and Drainage Services
54	Arts and Recreation Services	Creative and Performing Arts Activities
55	Information Media and Telecommunications	Broadcasting (except Internet)
56	Information Media and Telecommunications	Telecommunications Services
57	Electricity, Gas, Water and Waste Services	Electricity Supply
58	Manufacturing	Polymer Product and Rubber Product Manufacturing
59	Information Media and Telecommunications	Publishing (except Internet and Music Publishing)
60	Financial and Insurance Services	Insurance and Superannuation Funds
61	Manufacturing	Basic Chemical and Chemical Product Manufacturing
62	Manufacturing	Beverage and Tobacco Product Manufacturing
63	Electricity, Gas, Water and Waste Services	Waste Collection, Treatment and Disposal Services
64	Information Media and Telecommunications	Motion Picture and Sound Recording Activities
65	Retail Trade	Fuel Retailing
66	Wholesale Trade	Wholesale Trade, nfd
67	Wholesale Trade	Motor Vehicle and Motor Vehicle Parts Wholesaling
68	Mining	Exploration and Other Mining Support Services
69	Transport, Postal and Warehousing	Air and Space Transport
70	Mining	Mining, nfd
71	Education and Training	Education and Training, nfd
72	Arts and Recreation Services	Heritage Activities
73	Financial and Insurance Services	Financial and Insurance Services, nfd
74	Transport, Postal and Warehousing	Other Transport
75	Transport, Postal and Warehousing	Warehousing and Storage Services
76	Retail Trade	Non-Store Retailing and Retail Commission-Based Buying and/or Selling
77	Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing Support Services
78	Mining	Metal Ore Mining
79	Transport, Postal and Warehousing	Transport, Postal and Warehousing, nfd
80	Manufacturing	Pulp, Paper and Converted Paper Product Manufacturing
81	Arts and Recreation Services	Arts and Recreation Services, nfd
82	Information Media and Telecommunications	Internet Service Providers, Web Search Portals and Data Processing Services
83	Agriculture, Forestry and Fishing	Aquaculture
84	Wholesale Trade	Commission-Based Wholesaling
85	Transport, Postal and Warehousing	Rail Transport
86	Agriculture, Forestry and Fishing	Fishing, Hunting and Trapping
87	Mining	Oil and Gas Extraction
88	Transport, Postal and Warehousing	Water Transport

89	Mining	Coal Mining
90	Professional, Scientific and Technical Services	Professional, Scientific and Technical Services, nfd
91	Other Services	Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use
92	Public Administration and Safety	Defence
93	Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing, nfd
94	Agriculture, Forestry and Fishing	Forestry and Logging
95	Manufacturing	Petroleum and Coal Product Manufacturing
96	Information Media and Telecommunications	Information Media and Telecommunications, nfd
97	Electricity, Gas, Water and Waste Services	Gas Supply
98	Electricity, Gas, Water and Waste Services	Electricity, Gas, Water and Waste Services, nfd
99	Information Media and Telecommunications	Internet Publishing and Broadcasting
100	Information Media and Telecommunications	Library and Other Information Services
101	Other Services	Other Services, nfd
102	Public Administration and Safety	Public Administration and Safety, nfd
103	Rental, Hiring and Real Estate Services	Rental, Hiring and Real Estate Services, nfd
104	Accommodation and Food Services	Accommodation and Food Services, nfd
105	Administrative and Support Services	Administrative and Support Services, nfd
106	Inadequately described	Inadequately described
107	Not stated	Not stated
108	Not applicable	Not applicable

Source: ABS

TABLE 14. LIST OF 2 DIGIT INDUSTRIES RANKED IN ORDER OF GROWTH FROM 2001 TO 2011 GOLD COAST INDUSTRY SHARE OF JOBS

Rank	1 Digit Industry	2 Digit Industry
1	Professional, Scientific and Technical Services	Professional, Scientific & Tech Services
2	Construction	Construction Services
3	Education and Training	Preschool and School Education
4	Health Care and Social Assistance	Hospitals
5	Public Administration and Safety	Public Administration
6	Administrative and Support Services	Administrative Services
7	Health Care and Social Assistance	Medical & Other Health Care Services
8	Construction	Building Construction
9	Health Care and Social Assistance	Social Assistance Services
10	Other Services	Personal and Other Services
11	Retail Trade	Other Store-Based Retailing
12	Arts and Recreation Services	Sports and Recreation Activities
13	Education and Training	Tertiary Education
14	Administrative and Support Services	Building Cleaning, Pest Control and Other Support Services
15	Other Services	Repair and Maintenance
16	Health Care and Social Assistance	Residential Care Services
17	Public Administration and Safety	Public Order, Safety and Regulatory Services
18	Accommodation and Food Services	Food and Beverage Services
19	Rental, Hiring and Real Estate Services	Property Operators and Real Estate Services
20	Transport, Postal and Warehousing	Road Transport
21	Retail Trade	Food Retailing
22	Education and Training	Adult, Community and Other Education
23	Professional, Scientific and Technical Services	Computer System Design and Related Services

24	Arts and Recreation Services	Gambling Activities
25	Accommodation and Food Services	Accommodation
26	Mining	Non-Metallic Mineral Mining and Quarrying
27	Construction	Heavy and Civil Engineering Construction
28	Health Care and Social Assistance	Health Care and Social Assistance, nfd
29	Electricity, Gas, Water and Waste Services	Water Supply, Sewerage and Drainage Services
30	Electricity, Gas, Water and Waste Services	Electricity Supply
31	Electricity, Gas, Water and Waste Services	Waste Collection, Treatment and Disposal Services
32	Mining	Exploration and Other Mining Support Services
33	Construction	Construction, nfd
34	Manufacturing	Food Product Manufacturing
35	Rental, Hiring and Real Estate Services	Rental and Hiring Services (except Real Estate)
36	Arts and Recreation Services	Creative and Performing Arts Activities
37	Transport, Postal and Warehousing	Postal and Courier Pick-up and Delivery Services
38	Manufacturing	Transport Equipment Manufacturing
39	Mining	Mining, nfd
40	Manufacturing	Manufacturing, nfd
41	Retail Trade	Motor Vehicle and Motor Vehicle Parts Retailing
42	Manufacturing	Fabricated Metal Product Manufacturing
43	Transport, Postal and Warehousing	Transport Support Services
44	Manufacturing	Machinery and Equipment Manufacturing
45	Education and Training	Education and Training, nfd
46	Retail Trade	Retail Trade, nfd
47	Manufacturing	Furniture and Other Manufacturing
48	Manufacturing	Wood Product Manufacturing
49	Manufacturing	Textile, Leather, Clothing and Footwear Manufacturing
50	Arts and Recreation Services	Heritage Activities
51	Mining	Metal Ore Mining
52	Manufacturing	Primary Metal and Metal Product Manufacturing
53	Manufacturing	Non-Metallic Mineral Product Manufacturing
54	Transport, Postal and Warehousing	Air and Space Transport
55	Wholesale Trade	Other Goods Wholesaling
56	Agriculture, Forestry and Fishing	Agriculture
57	Manufacturing	Printing (including the Reproduction of Recorded Media)
58	Retail Trade	Fuel Retailing
59	Transport, Postal and Warehousing	Other Transport
60	Transport, Postal and Warehousing	Warehousing and Storage Services
61	Arts and Recreation Services	Arts and Recreation Services, nfd
62	Manufacturing	Polymer Product and Rubber Product Manufacturing
63	Financial and Insurance Services	Finance
64	Wholesale Trade	Basic Material Wholesaling
65	Manufacturing	Basic Chemical and Chemical Product Manufacturing
66	Mining	Oil and Gas Extraction
67	Manufacturing	Beverage and Tobacco Product Manufacturing
68	Financial and Insurance Services	Auxiliary Finance and Insurance Services
69	Transport, Postal and Warehousing	Transport, Postal and Warehousing, nfd
70	Wholesale Trade	Machinery and Equipment Wholesaling
71	Wholesale Trade	Grocery, Liquor and Tobacco Product Wholesaling
72	Mining	Coal Mining
73	Retail Trade	Non-Store Retailing and Retail Commission-Based Buying and/or Selling

74	Transport, Postal and Warehousing	Rail Transport
75	Wholesale Trade	Wholesale Trade, nfd
76	Wholesale Trade	Motor Vehicle and Motor Vehicle Parts Wholesaling
77	Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing Support Services
78	Transport, Postal and Warehousing	Water Transport
79	Public Administration and Safety	Defence
80	Manufacturing	Pulp, Paper and Converted Paper Product Manufacturing
81	Financial and Insurance Services	Insurance and Superannuation Funds
82	Professional, Scientific and Technical Services	Professional, Scientific and Technical Services, nfd
83	Other Services	Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use
84	Electricity, Gas, Water and Waste Services	Gas Supply
85	Agriculture, Forestry and Fishing	Aquaculture
86	Electricity, Gas, Water and Waste Services	Electricity, Gas, Water and Waste Services, nfd
87	Agriculture, Forestry and Fishing	Fishing, Hunting and Trapping
88	Financial and Insurance Services	Financial and Insurance Services, nfd
89	Public Administration and Safety	Public Administration and Safety, nfd
90	Other Services	Other Services, nfd
91	Wholesale Trade	Commission-Based Wholesaling
92	Administrative and Support Services	Administrative and Support Services, nfd
93	Rental, Hiring and Real Estate Services	Rental, Hiring and Real Estate Services, nfd
94	Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing, nfd
95	Manufacturing	Petroleum and Coal Product Manufacturing
96	Agriculture, Forestry and Fishing	Forestry and Logging
97	Accommodation and Food Services	Accommodation and Food Services, nfd
98	Inadequately described	Inadequately described
99	Not stated	Not stated
100	Not applicable	Not applicable
101	Information Media and Telecommunications	Library and Other Information Services
102	Information Media and Telecommunications	Internet Publishing and Broadcasting
103	Information Media and Telecommunications	Information Media and Telecommunications, nfd
104	Information Media and Telecommunications	Internet Service Providers, Web Search Portals and Data Processing Services
105	Information Media and Telecommunications	Motion Picture and Sound Recording Activities
106	Information Media and Telecommunications	Publishing (except Internet and Music Publishing)
107	Information Media and Telecommunications	Telecommunications Services
108	Information Media and Telecommunications	Broadcasting (except Internet)

Source: ABS

APPENDIX B: CONSULTATION NOTES

5.3 Workshop 1 – higher education sector

What are the current skills and training gaps you see in the Gold Coast?

Skills gaps

- Health sector
 - Predominately in the Allied Health/supporting sectors.
 - Nursing shortages
 - Not so much at top end (i.e. Doctors). However, there is still some gaps in specialised areas, such as dentistry.
 - The workforce is aging which will contribute to gap increasing in future.
- Education
 - The workforce is aging which could contribute to gap increasing in future.
- Retail/Recreation/etc
 - Short term shortage from Commonwealth Games
- Engineering and mining
- ICT
 - The industry is moving so quickly
 - Mismatch of skills – need greater skills to have a career in the industry

Training gaps

- Education levels are very low on the Gold Coast compared to SEQ and Qld
- To increase demand for higher education there needs to be an industry for people to go in to
 - No industry then people don't go to university or leave the Gold Coast once they're qualified
- There is no latent demand for university places for Gold Coast students – Gold Coast universities are filling demand for local higher education already

How are these gaps affecting the economy?

- Impact from losing people who have career aspirations which require higher education
 - The importance of education needs to increase to move from a low skilled industry based to highly skilled.

In the future what sectors of the economy do you think will have skills shortages? Are these existing / new areas?

Growth areas/Opportunities

- Manufacturing
 - Needs to/is moving toward more niche sectors and focus on R&D including motor sports, marine, “smart” manufacturing (i.e. 3D printing), food processing, construction based manufacturing, sustainability, health sectors, sporting and pharmaceuticals
- Event Management
 - Focus on corporate/health/education tourism
 - Potential to up-skill existing Retail/recreation sectors
- Education

- Become an education exporter/education city
- Film/TV
 - Potential to reposition sector to small screen and online content creation
- Health sector
 - Education and training opportunity for health care professionals for multiskilling and up-skilling in this sector
- Sports
 - A sports city? Leverage off the Commonwealth Games, attract AIS?
- Sustainability city
 - Already existing research and skills around climate change adaptation. Could be built on.

Do you think there will be a need for retraining any segments of the labour force?

Surplus

- Marine (heavily linked to economic performance)
 - But an innovative industry with transferrable skills
- Retail/Hospitality (particular middle ages, given wages support young workforce)
- Construction (but has an aging workforce). Also there is a shortage of specialised construction skills
- Graduates in pharmacy and physiotherapy

Re-skilling

- Tourism and hospitality industry
 - especially customer service training
 - maturing the tourism product
- Need to develop broader range of skills (business acumen needed across all sectors)

What additional things can / should the higher education sector / government do to ensure future opportunities in the Gold coast can be realised? Anticipated challenges?

- Relationship between universities and industry is crucial
 - Industry as the voice of the sector: get industry to explain what their industry is; talk about what's involved
 - Needs to be strengthened beyond the typical advisory board
- A lot of change is lead by the research at universities
- Need to adapt to new markets
- Gold Coast has poor tertiary attainment, potential to promote TAFE as transition to university, not just alternative
- Promote the Gold Coast as student friendly
 - If you study on the Gold Coast always connected to the place. Will act as an ambassador and might come back to do business, live, etc.
- Building on the strengths we have
 - Got enough education institutions
- Diversification of the economy but need to be smart about it
 - Currently a reliance on tourism and hospitality. These industries are always going to be important but need to diversify
 - Need to promote message that the Gold Coast NEEDS a diversified economy
- Providing local career information
- Articulating a vision / identity for the Gold Coast
 - Not a capital city, not a regional city...what is its identity?
 - Need for clear vision/direction of GC and alignment across 3 tiers of Gov
 - Issue of Gold Coast not being regional and not a capital city. Therefore misses out on funding and other program opportunities
- Education providers have a job creation and entrepreneurial role
 - Providing incubation opportunities, seed funding

Additional comments

- Major issue with skills gap is lack of clear pathways right from high school through uni (i.e. which course will lead to a job)
- Average size of firms in the Gold Coast is very small

5.4 Workshop 2 – local business sector

Who do you employ at the moment (where do they come from, what are the skills you require)?

Commonwealth Games

- Currently has 26 staff (mostly corporate roles) all employed from GC
- Will employ 44 staff over next 12mths, double that each year up to games
- For games (in 2017) will need 1,000 paid and 15,000 volunteers, depend on 30,000 contractors.
 - Focus on employing locally where possible
 - Will wind-up within 18mths of closing ceremony. With most finishing immediately.
- Key Skills gaps: Security, procurement officers, ICT
- State gov is kicking off legacy projects, trying to leverage games into other major events.

Other employers

- Very diverse range of skills
 - Management
 - Digital artists
 - E-learning specialists
 - Field staff
 - Admin
 - Finance
 - Production
 - Etc.

What are the challenges businesses / the region face (from a workforce perspective)? How are you dealing with these challenges?

Challenge

- Finding funding sources (eg. Program to increase childcare training involved 48 different funding sources)
- Overskilled workers can't find appropriate jobs. They are either
 - Leaving the Gold Coast or
 - getting employment in sub-optimal occupations and not reaching full potential of qualification.
- Private sector doesn't report issues until there is an issue then relevant agencies don't have time to act.
- Larger firms are diversifying down to compete with small blue collar operations.
- Firms in the Gold Coast don't have market to grow
- Getting people to move to the Gold Coast for a job opportunity
 - There are risks as there are so few other opportunities if you lose your job, etc.
- Workforce skills not matched to the work
 - Not enough entry level jobs in many fields including manufacturing, technology, construction
- Few opportunities on the Gold Coast for management so they stay in jobs for a long time
 - Makes it hard for others to progress
 - They can get stagnant in the job
- Costs of business increasing but fees for service down
- HR laws are onerous for small and medium enterprises – they're geared towards larger corporations
- Perception of the Gold Coast

- Seasonal nature of much of the work
- Small market on the Gold Coast
- Newer businesses
 - Don't have the market in emerging industries or the skills
 - Owners and managers working so hard on the business they don't have time for processes, business planning, etc.
- Employers not good at workforce planning
 - Don't know they need it until there's a problem
 - Many don't even have business plans in place
 - They aren't aware of what funding is available

Current solutions

- Bringing in staff at an entry level position and training them / nurturing them
- Continuous training for all employees
- Giving staff a clear career pathway
- Staff on 457 visas
- Having staff from Brisbane who commute

Ideas

- Technology based mentors to help small businesses
- Mentoring more generally for new firms from people in existing, stable Gold Coast based businesses
- Mentoring of managers

In the future what sectors of the economy do you think will have skill shortages? Are these existing / new areas?

Skills Gaps

- R&D, scientific and specialised skills, ICT (both workforce and firms), laboratory operations, marine industry
- Specialised areas of construction (Project Managers, etc.)
- Health services
 - Particularly lower skilled, Certificate III level (aged care, personal care, support services including laundry and kitchen)
- NBN – limited knowledge of how to use it effectively

Do you think there will be a need for retraining any segments of the labour force?

- Any industry which require strong customer service skills (hospitality, tourism, bus drivers, etc.)
 - Customer service skills can be terrible on the Gold Coast

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