

**Submission to the
Inquiry into Infrastructure and the
Development of Australia's Regional Areas**

of the

**House of Representatives Standing Committee on Primary
Industries and Regional Services**



**BUSINESS
BALLARAT**

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Location Map



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1. Summary

Ballarat is an important regional centre, which is contributing significantly to the economic development of Australia. It is strategically located on major transport routes, which connect the City and its productive agricultural hinterlands with major air and seaports. The future of Ballarat's economic development is tied to many factors of which infrastructure is predominant. In the recent past Ballarat has developed a good infrastructure base, this may not be the case in the future. Because of a general hesitancy by the private sector to invest in regional projects, in favour of investment in Melbourne and other capital cities, and a limited capacity of Council to fund major capital works, Ballarat could be disadvantaged. Governments have played an important role in the provision of infrastructure in the past and the need for this role is likely to increase in the years ahead.

One of the impediments in determining the need for infrastructure is the continuing competition between regions for projects and investment. The current uncontrolled "bidding" system by regions should be curtailed and projects directed to those regions that have the best location advantages for the development concerned.

Ballarat has specific deficiencies in infrastructure that needs to be addressed in the immediate future. These include an increase in the availability of serviced industrial land and additional facilities such as a container park. Ballarat is also placed at a disadvantage in its ability to develop existing business and attracting new investment because of the absence of key elements of infrastructure.

There is a requirement to develop additional roadworks servicing the central activity area of Ballarat to meet the residents needs and to ensure that the City can effectively maintain its role as a regional retail centre.

The Victorian Government has long recognised that there is a vital need to link the major regional cities, to ensure the effective movement of agricultural products, manufactures and tourists. The connection between Ballarat and Geelong needs to be improved by upgrading the Midland Highway and extending the National Standard Gauge Railway line. Likewise Ballarat's rail link with Melbourne requires upgrading to ensure that Ballarat commuters can access the State's capital in under an hour.

For Ballarat's role as a food processing centre to be further developed, the City seeks to develop an integrated agri-business precinct to promote value-adding to regional produce and to provide

the necessary waste disposal treatment infrastructure and a food handling and processing incubator.

Ballarat must ensure that it has the supporting infrastructure that is commensurate with its role as a major Australian information technology (IT) and telecommunications centre. At this time work is being undertaken by Business Ballarat, the University of Ballarat and the Ballarat business community to create additional IT projects. A telecommunications call centre is needed because it will service business and create new jobs in an area of targeted development.

Tourism is also a major growth area for the Ballarat economy. Significant progress has been made in this industry sector over recent years. However, to fully realise its potential, Ballarat needs a 4 star plus hotel and convention centre. To date this project has been hampered by investor concerns about undertaking major hotel developments in regional Australia.

2. Introduction

Business Ballarat, the economic development arm of the Ballarat City Council, has prepared this submission to provide the House of Representatives Standing committee on Primary Industries and Regional Services with an understanding of the impact of infrastructure on the sustainability of economic development in Ballarat and its region.

In particular, this submission considers factors of infrastructure that are supporting economic development and suggests a coordinated approach to planning development which will contribute significantly to the longer-term economic growth of regional centres such as Ballarat.

This submission also considers a number of instances where the lack of appropriate infrastructure is retarding development. Finally, the submission looks at the role of government and the private sector to provide infrastructure, and highlights Council's limited capacity to fund capital works.

3. Factors that enhance development in Ballarat

The City of Ballarat is one of the largest inland cities in Australia, with a population of some 80,000 people, and is located in the Central Highlands Region of Victoria. Details of the current and forecast populations of Ballarat are shown at Appendix 1. The City is linked to the capital of Victoria by a 110 km four-laned divided highway, giving access to the Melbourne Central Business District (CBD) in a little over an hour.

The City is in a prime strategic position at the centre of some of Victoria's most important freight, tourist and commuter transport routes. The four main highways radiating from Ballarat - the Western, the Midland, the Glenelg and the Sunraysia - connect it to industrial centres such as

Melbourne, Adelaide, Geelong and Portland; regional locations like Bendigo and Mildura; and agricultural areas in the Mallee and Wimmera.

Ballarat is a major regional centre for V/Line passengers rail and coach network, with daily services to Melbourne and most regional centres. Ballarat Railway Station is a Freightgate within V/Line's freight system, handling containers, pallets, light freight and parcels. A full range of Fast-track and Parcels services is offered.

The Ballarat urban area is serviced by two main water supplies: a gravity system fed by the Moorabool and White Swan Reservoirs; and a pumped supply from the Lal Lal Reservoir. This provides a supply of good quality water that is sufficient to serve 160,000 people. This is well above expected population growth forecasts for the next 25 years. There are no supply constraints for industrial users, who currently use 10% of the total volume supplied.

The Central Highlands Water's sewerage treatment plant currently handles approximately 140kEP with an augmentation capacity of 200kEP up to the year 2005. The Authority is in the process of completing augmentation works to accommodate future development.

Ballarat is serviced by a major natural gas pipeline. A reticulated system is in place, with radial feeders following the arterial road network supplying gas to the whole existing urban area.

Future development outside this area would not require significant expenditure to be connected to the system.

Ballarat's electricity supply is sufficient to meet the needs of domestic and industrial users, with no capacity constraints for incremental new development. A network of 22kV distribution feeders services the developed area, and new feeders can be constructed for industrial development outside the area.

The city is linked by optical fibre, microwave radio and coaxial cable in a sophisticated communication network, which supports both mobile and fixed site communication for voice and data between the city and locations throughout Australia and overseas. Once out of the city area, however, mobile phone coverage is patchy. There is a very real need for a Call Centre facility in Ballarat to create new jobs and provide a service to the community. The high cost of telecommunications continues to be considered a locational disadvantage to business in Ballarat.

The Ballarat Aerodrome is located 7.5km from the city centre. There are three runways, two of which are bitumen and one grass. Night lighting exists and the aerodrome has a non-directional Beacon navigation device. The airport caters for business, television and Air Ambulance users.

The Melbourne Airport is one hour from Ballarat, allowing quicker access to international and interstate locations than from many parts of Melbourne.

The labour force in Ballarat is some 37,200 people (DEETYA, March 1998). Ballarat people are relatively well-qualified compared to other communities in country Victoria, and Victoria as a whole, especially in the proportion of those holding bachelor degrees or post-graduate qualifications, 8.6% compared with 7.0% and 11.4% respectively.

The dominant occupations for employed residents are Professionals (17.6%), Intermediate clerical, sales and service workers (15.2%) and Tradespersons and related workers (13.7%). These occupation types generally reflect country Victorian and Victorian averages. The details of the make-up of the labour force are shown in Appendix 2.

The Ballarat workforce is about 31,700 (ABS Business Register Sept 1997). Key industries, in terms of aggregated employment, are Manufacturing (19.2% of jobs in Ballarat), Retail Trade (15.9% of jobs), Health and Community Services (13.4%) and Education (10.4%). A profile of jobs in Ballarat is shown in Appendix 3. Compared with country Victoria and Victoria, Ballarat has a relatively high proportion of its resident employed labour force in these categories. The figures reflect Ballarat's role as a regional centre for a range of services, as well as being an important manufacturing centre with some key industries located in the city. Unemployment remains above the Victorian average as is shown in Appendix 4.

Key manufactured products include food and beverages, mineral products, fabricated metal products, and machinery and equipment. Some of the key manufacturers in Ballarat include Bendix Mintex, Bunge, CMI Pressed Components, Eureka Tile Company, MaxiTRANS, Haymes Paint, Hilton Fabrics, Laminex Industries, Mars Confectionery, McCain Australia, Oliver Footwear, Rivers, and Selkirk Bricks.

The Central Highlands produced over \$261 million of agricultural produce in 1995/96. The statistical divisions that made up Western Victoria account for 45% of the value of Victoria's total agricultural production. Given its strategic position on key transport routes, its rich agricultural hinterland, proximity to the Mallee and Wimmera regions, and a skilled workforce, Ballarat is an ideal location for processing farm produce.

A recent example of the locational advantages for food processing is the establishment of Hakubaku Australia. This is a Japanese firm producing traditional Japanese dried noodles. Currently it has a workforce of 30 people, which is expected to grow as the firm expands. Hakubaku exports its products to Japan and is looking to supply other export locations in Asia, as well as the Australian market. Ballarat was a desirable location for this investment because it

was close to Hakubaku's raw product, which is sourced from wheat growers in north-western Victoria and southern New South Wales.

Hakubaku has developed an excellent relationship with its supplier Bunge (Aust) Ltd, which processes organically grown wheat varieties at its flourmill in Ballarat. An excellent transport network and great lifestyle contribute to the advantages of investing in Ballarat.

The Ballarat City Council wishes to develop further opportunities in food processing and recognises that improved transport infrastructure from agricultural areas, shipping and airports must be of national standard if this objective is to be achieved fully. Matters such as the extension of the current high-standard trade waste disposal system to cater for industrial development in the north of Ballarat must be addressed. A lack of suitable infrastructure will limit Ballarat's ability to attract more investment in food processing, thus dampening the market for new jobs, adding value to agriculture products, developing new exports and creating greater import replacement.

Ballarat is a major regional retail centre with around 190,000m² of retail floor space. It is also a regional centre for banking, finance, insurance and other city centre services, as well as being a regional centre for government services, health and education. The City, as one of regional Australia's foremost tourist destinations, has many diverse attractions. Among these are Sovereign Hill, the Eureka Stockade centre, the Ballarat Fine Art Galley, the Great Southern Woolshed and the Ballarat Wildlife and Reptile Park. There are also 31 hotels and motels in the city that provide accommodation, and 20 establishments offering conference facilities.

In 1997 Ballarat welcomed 207,362 guests who spent some \$11.7 million in the City. In 1995 653,700 day visitors spent some \$23.1 million in Ballarat and its surrounds.

The City is a regional centre for education and attracts people from throughout Victoria and wider afield to study at its secondary and tertiary facilities. The area has 51 primary schools, of which 38 are government schools. There are 9 secondary schools of which 4 are government schools. Ballarat is home to the Australian Catholic University - Aquinas Campus, University of Ballarat and the De Silva College of Business and Tourism.

IT and telecommunications are being emphasised by Business Ballarat and the University of Ballarat as a special opportunity for Ballarat. The University has developed a Technology Park at its campus to facilitate the development of the industry. Already, IBM Global Services Australia has set up on the Park. This Centre is the headquarters for IBM's computing services for South East Asia. The University has established the Greenhill Enterprise Centre for new IT companies at the Park. In 1992 the State Data Centre was set up in Ballarat by the Victorian Government to

provide geographic information system services. In 1997 elements of the operations of this organisation were merged with the University of Ballarat to form the Centre for Rural and Regional Information.

4. Planning, coordination and cooperation in the provision of infrastructure

4.1 Competition between regions

One of the impediments to effective regional development is the ongoing “competition” between regions and their economic development organisations. Whereas competition and choice can be a stimulus to progress and development, the application of limited resources by a number of regional bodies in pursuit of the same projects is both questionable and financially inefficient. A far more logical approach to regional development is to recognise regions for their natural strengths and "expertise" and categorise them by their locational advantage for particular types of industry and business. This would lead to the development of "preferred" regions for a range of industry and business. This does not preclude more than one region "bidding" for particular projects, but it does mean that only those regions that most closely match the requirements of the potential investment are initially considered. The scheme would not apply for those business categories which are common to all or most regions.

Such a system would provide direction for governments and the private sector in the provision of infrastructure in regional areas. As a case-in-point, Ballarat could be classified as one of the preferred regions in Australia for information technology and food processing.

5. Deficiencies in Infrastructure which currently impede development in Ballarat

5.1 Serviced industrial land

Industrial land is available in the city, ranging in size from less than 0.2 hectares to over 16 hectares. This land is strategically located to enable a variety of industrial uses and appropriate land mixes. The new Ballarat Planning Scheme is designed to allow flexible development options.

Industrial land to the north and west of Ballarat enjoys good access to the freeway bypass (Western Highway), giving direct access to major markets including Melbourne. Council

maintains land at its Wendouree Industrial Park. Currently the Central Highlands Water Authority maintains two treatment plants, which serve the north and south sectors of the city.

Whereas the south plant is of an excellent standard, the plant that serves the north needs to be upgraded if the planned expansion of industry on the city's northern industrial land is to be achieved. This will particularly effect the development of the food processing industry in Ballarat.

5.2 Container Park

Currently industry is calling for the establishment of a container park in Ballarat, as such a facility would obviate the need, and therefore the costs, associated with transporting empty containers between Ballarat and Melbourne. This park should incorporate cleaning and other facilities as required by the food processing industry. The most appropriate locations for the park are in the north and west of the City. Council prefers these areas for future industrial development because of the availability of appropriate land and ready access to the Western Highway bypass. The lack of a container park will perpetuate the current level of cost to the transportation industry, disadvantage existing Ballarat businesses and limit Ballarat's potential as a location for industrial development.

6. The potential for development in Ballarat

6.1 Road works to implement Ballarat's CBA Strategy including car parking

The Ballarat Central Business Area (CBA) is the major shopping centre for the Ballarat region and much of Western Victoria. It has 130,200 m² of total retail floor space. Regional and local planning policies call for the CBA's role as the major commercial activity centre to not only be maintained but expanded.

There are problems associated with the north-south traffic access in the Ballarat CBA whereas east-west traffic routes have substantial capacity. There is strong justification now that the Ballarat By-pass has been completed, for establishing an effective "access road system" around the periphery of the CBA, which links directly with the main CBA car parking stations. The reduction of traffic around the periphery of the CBA is also consistent with the recommendations contained in the 1994 Ballarat Community Plan to

revitalise Sturt Street, Ballarat's main east-west route. Current estimates of car parking in the CBA indicate that off-street parking in the western sections of the CBA is required.

The establishment of a car parking structure in the vicinity of the existing Courthouse/police station in Camp Street would address this shortfall during business hours, and also provide the necessary car parking to serve the emerging education and cultural role of the precinct. In addition, it will reinforce the precinct's redevelopment, which involves the University of Ballarat.

6.2 Upgrading the road link to Geelong

As has been stated, Ballarat is strategically positioned at the intersection of the Western, Midland, Glenelg and Sunraysia Highways. Whereas all of these highways are significant, the Midland connects Ballarat to the bulk handling Port of Geelong and accesses the potential air freight facility at Linfox Avalon.

In addition to providing a major link between Ballarat and Geelong, it also provides a linkage via Ballarat with regional areas such as Horsham in the west, and Mildura, Bendigo and Echuca in the north. The highway is used for the transportation of:

- exports of wheat, wool, timber and other agricultural and manufactured products;
- imports of fuel fertilizer, and other agricultural imports and general goods; and
- regional distribution of fruit and vegetables, flour, bulk chemicals, new motor vehicles and a wide range of other goods.

The 90km route carries about 1.5 million tonnes of freight per annum. This is comprised of:

- 520,000 tonnes from the Central Highlands to the Barwon Region;
- 420,000 tonnes from Central Barwon to the Mallee Region;
- 400,000 tonnes from the Central Highlands to the Wimmera Region; and
- 160,000 tonnes from the Barwon Region to the Central Highlands.

Traffic ranges from 2,000 vehicles per day (vpd) in central rural parts to 9,000-15,000 vpd in urban areas. Trucks averaging 16.6 tons per vehicle contribute at least 300 vpd to traffic over the total route. Traffic volumes are growing at 1.5% per year compound.

Recently the pavement has been extended from 7 metres to 10 metres by widening the road's shoulders. To bring the road up to required standards, additional overtaking lanes

need to be established and pavement rehabilitation on a number of sections need to be undertaken. Total costs for these improvements are some \$5 million.

Consideration should be given to increasing allocations of funding to strategically important rural roads, like the Midland, thus ensuring that the level of traffic management and road use cost efficiencies are achieved.

6.3 Linking Ballarat to the National Standard Rail Grid

If Ballarat is denied the opportunity of being connected to the National Standard Gauge Railway Line, it will be restricted in its ability to ship bulk goods to interstate locations in the short term, and to the Port of Geelong in the longer term. In the future, this will prove to be a disincentive for potential investors and the development of central Victoria.

At the time of deciding the route for the National Standard Gauge Railway Line in Victoria, it was recognised that while the line would pass through Geelong, Ballarat should be linked by at least a spur line in the immediate future. The linkage from Geelong to Ballarat is relatively low in cost because a dual gauge (three rail) system can be used over the majority of the length of the track. In 1992 the cost was estimated at \$7 million. This connection opens the way for further extensions of the standard gauge rail line into northern Victoria and the Riverina, and lead eventually to the rail gauge being standardised throughout the whole Victorian railway network.

6.4 Fast Passenger Train to Melbourne

The linkage with Melbourne is very important to Ballarat, as Melbourne is a significant market for Ballarat businesses; it is a major source of Ballarat's inputs; and increasingly it is becoming the place of work for Ballarat's residents. As with many regional centres in close proximity to capital cities, Ballarat is seen to have a lifestyle advantage over Melbourne. This is supported by more affordable housing and living costs. The provision of the appropriate transport infrastructure will be the stimulus for the development of a commuter population, particularly if travel times are reduced to less than one hour. This increase in population brings new revenue into the community, and new entrepreneurs who in time stimulate investment and employment. The development of a commuter population in Ballarat will ease development costs in the metropolitan area and take up available development capacities in Ballarat.

V/Line currently provides 11 services to Melbourne daily, 5 of which are by sprinter train. Whereas this service is good, it does not provide a guaranteed travel time of under one hour. Infrastructure development at the Melbourne end is required to ensure that country schedules are not given a lower priority than metropolitan schedules. In addition, upgrading of bridges and track re-alignments along the route will allow higher speeds to be maintained.

6.5 Agri-business Precinct

Ballarat is located strategically on the key transport routes to the major agricultural regions of Western Victoria, has a skilled food processing workforce and has established food processing companies located in its area.

Accordingly, Business Ballarat's Economic Development Strategy has as one of its goals "to identify and develop new opportunities for food, fibre and timber processing at Ballarat which flows from the wider region's competitive advantages in the growing of livestock, trees and food crop products". To give effect to this goal, Business Ballarat wishes to support establish a food processing / agri-business precinct. A recent study has identified a number of suitable sites. A food handling / processing incubator could also be included. The formation of such a precinct opens the way to developing clusters of food, fibre and timber value-adding businesses which will creating a critical mass of economic activity for the City. This precinct will require a range of physical infrastructure investments including a trade waste treatment works. Support from the Commonwealth and State Government's and the private sector will be required for this development to come to fruition.

6.6 Telecommunications Call Centre

Ballarat must ensure that it has the infrastructure that is commensurate with its role as a major Australian Information Technology and Telecommunications Centre. One such element would be a Telecommunications Call Centre. This could provide a range of services for Ballarat businesses and the community at large. Importantly it will provide new employment and skills. One of the difficulties faced by Ballarat is the generation of Information Technology and Telecommunications jobs for the stream of IT graduates coming from the University of Ballarat. If sufficient employment is not generated, then Ballarat could experience an "IT brain drain" to Melbourne and elsewhere. Research

conducted by the Centre for Electronic Commerce and Communications at the University of Ballarat identified that 20% of a sample of 80 Ballarat rail commuters to Melbourne worked in the Melbourne IT industry.

6.7 4 Star Plus Hotel and Convention Centre

Tourism plays a vital part in Ballarat's economy and is a growing local industry. Ballarat caters for a variety of tourists - overnight visitors, day trippers, back packers, business and international visitors - and has a range of accommodation on offer, including hotels, motels, caravan parks and bed & breakfast establishments. In the December quarter of 1997 the City of Ballarat contained 31 hotel and motel establishments which provided a total of 854 guest rooms and 2,716 bed spaces. In 1997 there were 9,300 guest nights in the December quarter and 90,400 in the March quarter.

There are around 20 establishments that have conference facilities in Ballarat. The maximum capacity of these venues varies from around 50 to 650 people with most being able to handle at least 100 people.

Business Ballarat has long recognised that there is an unfulfilled need at the top end of the market, and that a 4 star plus hotel and convention centre should be introduced. There have been several attempts at attracting investors but as yet no commitment to the facility has been obtained. Even though such a venture has been shown to be attractive, the fact that the investment is in a regional centre and not Melbourne appears to have mitigated against it. This is a common problem in Victorian regional centres. There is a perception that the risk for large financial investments is greater in regional than in metropolitan areas. In Greater Geelong, significant private investment in the city's foreshore development only took place after the Victorian Government invested significant "seed" funding into the development's infrastructure. There is a need for greater government commitment to the provision of infrastructure in all areas of regional development before the private sector in general will commit significant investment in regional areas.

7. The Role of Government and the Private Sector in providing Infrastructure in Ballarat

7.1 Council's ability to fund Infrastructure

The matter of government funding of infrastructure has been addressed in part in Section 6.7. In addition it must be stressed that Council has a limited capacity to fund infrastructure, given its increasing responsibilities and finite capacity to raise revenue and borrow funds for capital works. This is a significant impediment to local area development. Council looks to increased support from the Commonwealth and State Governments for project development, particularly in the light of the hesitancy of the private sector to provide infrastructure funding. Notwithstanding, Council sees the private sector having to assume direct responsibility for the provision of infrastructure where it is the major beneficiary. As a case-in-point, Council is responsible for the maintenance and upkeep of the Ballarat aerodrome. This will no doubt have to be carried out in partnership with the private sector, although in the short term additional government support will be required.

APPENDICES

Appendix 1

Population in Ballarat, 1986 to 1997

Statistical Area	1986	1991	1996	1997
Ballarat - Central	36,640	35,630	34,700	34,940
Ballarat - Inner North	22,930	23,330	23,230	23,290
Ballarat - North	1,120	1,170	1,100	1,110
Ballarat - South	16,490	18,990	20,080	20,280
Ballarat City	77,180	79,120	79,110	79,630

Source: ABS, Population Victoria (3234.2); ABS, Estimated Resident Population, Victoria (3203.2)

Forecast Population of Ballarat

Year	Population	Period	Growth Rate (% per Annum)
1991	79,120		
1996	79,110	1991 - 1996	0.00%
1997	79,630	1996 - 1997	0.66%
2001*	81,400	1997 - 2001	0.54%
2006*	83,600	2001 - 2006	0.53%
2001*	85,800	2006 - 2011	0.53%

Source: ABS, Population Victoria (3234.2); Department of Infrastructure, Victoria in Future, 1996.

Note: * Population forecasts are based on the application of Department of Infrastructure forecast growth rates to the 1997 estimated resident population.

Appendix 2

Employed Labour Force by Occupation, Ballarat Residents

Occupation	Ballarat		Country Victoria	Victori a
	No.	%	%	%
Managers & Administrators (including farmers)	1,915	6.5	14.0	9.5
Professionals	5,191	17.6	14.2	17.8
Associate professionals	3,556	12.1	11.4	11.4
Tradepersons and related workers	4,029	13.7	13.7	12.9
Advanced clerical & service workers	1,036	3.5	3.2	4.3
Intermediate clerical, sales & service workers	4,471	15.2	13.0	15.4
Intermediate production & transport workers	2,634	9.0	9.1	8.9
Elementary clerical, sales & service workers	3,159	10.7	8.6	8.9
Labourers & related workers	2,653	9.0	10.0	8.3
Not stated/ inadequately described	769	2.6	2.8	2.7
Total	29,413	100.0	100.0	100.0

Source: ABS Census of Population and Housing, 1996

Appendix 3

Jobs in Ballarat as at 1997

Industry Division	No.	%
Agriculture, forestry & fishing	178	0.6
Mining	42	0.1
Manufacturing	6,094	19.2
Electricity, gas & water	399	1.3
Construction	1,582	5.0
Wholesale trade	1,213	3.8
Retail trade	5,047	15.9
Accommodation, cafes & restaurants	1,897	6.0
Transport & storage	974	3.1
Communication services	641	2.0
Finance and insurances	859	2.7
Property & business services	2,124	6.7
Government administration & defence	814	2.6
Education	3,341	10.5
Health & community services	4,238	13.4
Culture & recreation services	1,215	3.8
Personal & other services	1,043	3.3
Total	31,701	100.0

Source: ABS Census of Population and Housing, 1996

Appendix 4

Unemployment rate in Ballarat, 1990 to 1998

Statistical Area	June 1990	June 1991	June 1992	June 1993	June 1994	June 1995	June 1996	June 1997	June 1998
Ballarat*	7.8	12.5	13.1	18.5	17.7	11.1	10.6	12.2	13.8
Victoria	5.1	10.2	11.6	12.0	10.8	8.5	8.4	9.0	8.1

Source: Department of Education, Employment, Training and Youth Affairs, Small Area Labour Markets.

Note * Up to September 1997 Ballarat refers to the Ballarat Natural Labour Market, which comprises a wider region than the City of Ballarat, including the former municipalities Ballarat ©, Ballarat (S), Ballan, Bungaree, Buninyong, Creswick, Grenville, Ripon, Lexton, Daylesford, Glenlyon and Sebastopol. Figures since September 1997 refer to the City of Ballarat. Figures are seasonally adjusted.