

Wimmera Southern Mallee

Regional Economic Development Strategy

SUPPORTING ANALYSIS

Acknowledgement of Country

The Department of Jobs, Precincts and Regions acknowledge the Traditional Owners of the lands and waters on which we live and work, and pay our respects to their Elders past, present and emerging.

We acknowledge that the Wimmera Southern Mallee Regional Partnership region is on traditional lands, including those lands of the Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupgalk Nations, Dja Dja Wurrung and Gunditjmara Nations, as well as other Traditional Owner groups in Victoria who are not formally recognised.

We acknowledge the diversity of Aboriginal Victorians, their communities and cultures, the intrinsic connection to Country, the contribution and interest of Aboriginal people and organisations in developing a prosperous region. This Strategy is committed to advancing the principles of Aboriginal self-determination and supporting communities to realise self-determined economic development objectives.

Contents

- 01 Economic Insights 2**
 - 1.1 Business and Industry Analysis. 2
 - 1.2 Demographic Profile. 17
 - 1.3 Socio-Economic Profile. 22
 - 1.4 Labour Market. 28
 - 1.5 Skills 37
- 02 Comparative Advantage 38**
 - 2.1 Transport Infrastructure 39
 - 2.2 Digital Infrastructure 40
 - 2.3 Natural Endowments 42
- 03 Bibliography 45**
- 04 Strategic context 48**

01 Economic Insights

1.1 Business and Industry Analysis

Over the past five years, the Wimmera Southern Mallee region has realised stable employment but declining economic output. As the region's major centre, Horsham is the only municipality to achieve improved economic performance.

- The region maintains reliance on traditional Agriculture and Manufacturing industries as the pillars of regional economic activity, but the two sectors have ceded ground to a growing Health Care and Social Assistance industry. The declining reliance on traditional industries reflects the changing nature of the local economies.
- When considering both employment and output, the region is specialised (or concentrated) in Agriculture, Health Care and Social Assistance, Mining, Other Services and Electricity, Gas, Water and Waste Services industries.
- Across the region, 7 (of 19) sectors have outperformed the average growth rate across the state. This suggests there are a significant number of local factors contributing towards the changing economy.

In contrast to economic declines across the Wimmera Southern Mallee, the region's international export value has increased over the past decade and now totals \$349.6 million. Prior to COVID-19 tourism had also realised strong growth, with most visits coming from domestic tourists.





- Via an extensive road and rail network, the region is well connected with air and seaports in Adelaide, Melbourne and Geelong. These gateways have enabled the region to achieve strong export growth, particularly in agricultural goods. However, the road network stands to be improved, particularly on the secondary roads and highways through the region.
- With Grampians National Park (Gariwerd) as the region's crowning jewel, tourism is a significant contributor to the region's economy, particularly for the Northern Grampians LGA.

As regions seek to become more competitive in the global marketplace, economies are becoming increasingly specialised to focus production on regional strengths. For governments and local leaders, it has therefore become important to understand regional assets and attributes to better tailor plans and policies to support future economic growth and development.

A simple form of analysis to understand an economy's underlying structure is Location Quotient (LQ) analysis. This form of analysis compares industries' size and growth as a proportion of total economic activity relative to Victorian averages. The higher the LQ, the more significant, and therefore specialised, an industry is to the local economy relative to Victoria. This is also referred to as industry concentration. Scores above 1.25 are typically considered to indicate specialisation.

LQ Analysis, Employment

Figure 1.1.1 (below) identifies the Wimmera Southern Mallee Regional Partnership region's (the region) employment specialisations. Industries are divided into four colour groups according to their quadrant position:

	Blue sectors are regional concentrations which are experiencing faster growth than state averages
	Green sectors are regional concentrations which are experiencing slower growth (or faster declines) than state averages
	Orange sectors are emerging industries which are not regional concentrations but are experiencing faster growth (or slower declines) than state averages
	Grey sectors are not regional concentrations and are experiencing slower growth (or faster declines) than state averages

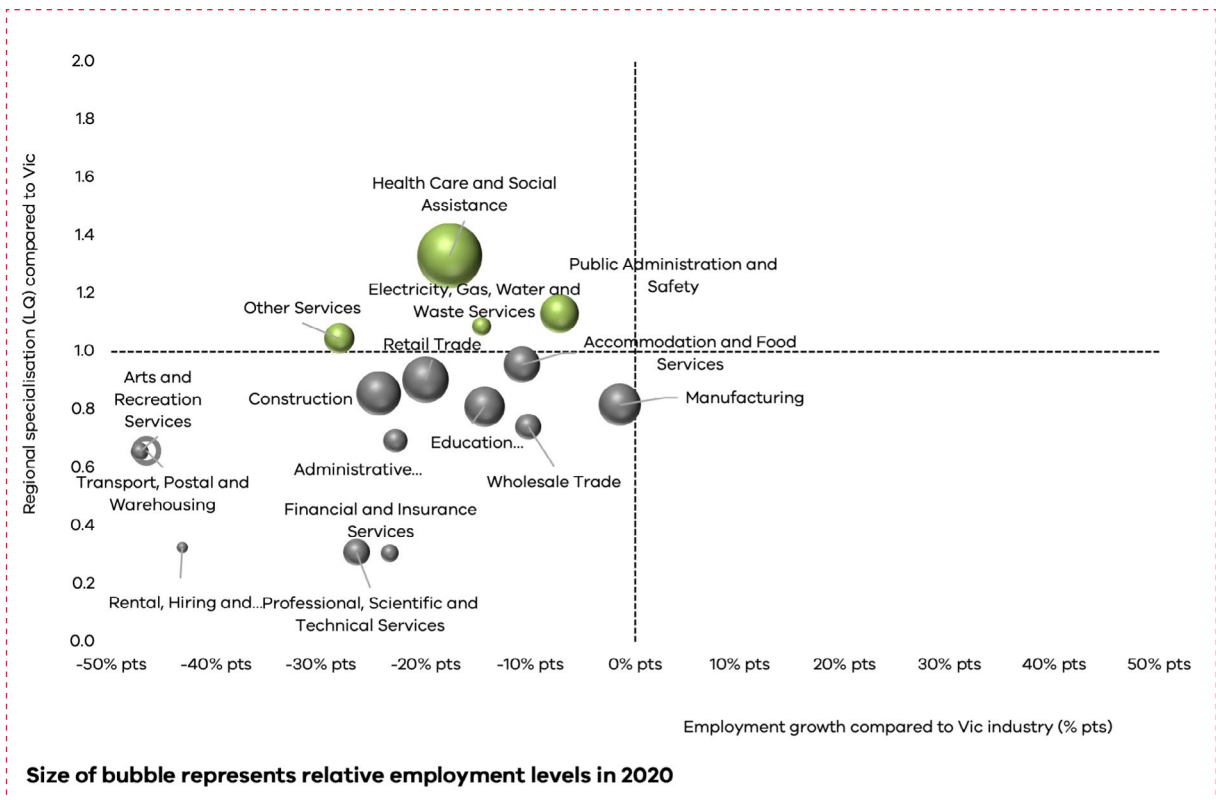
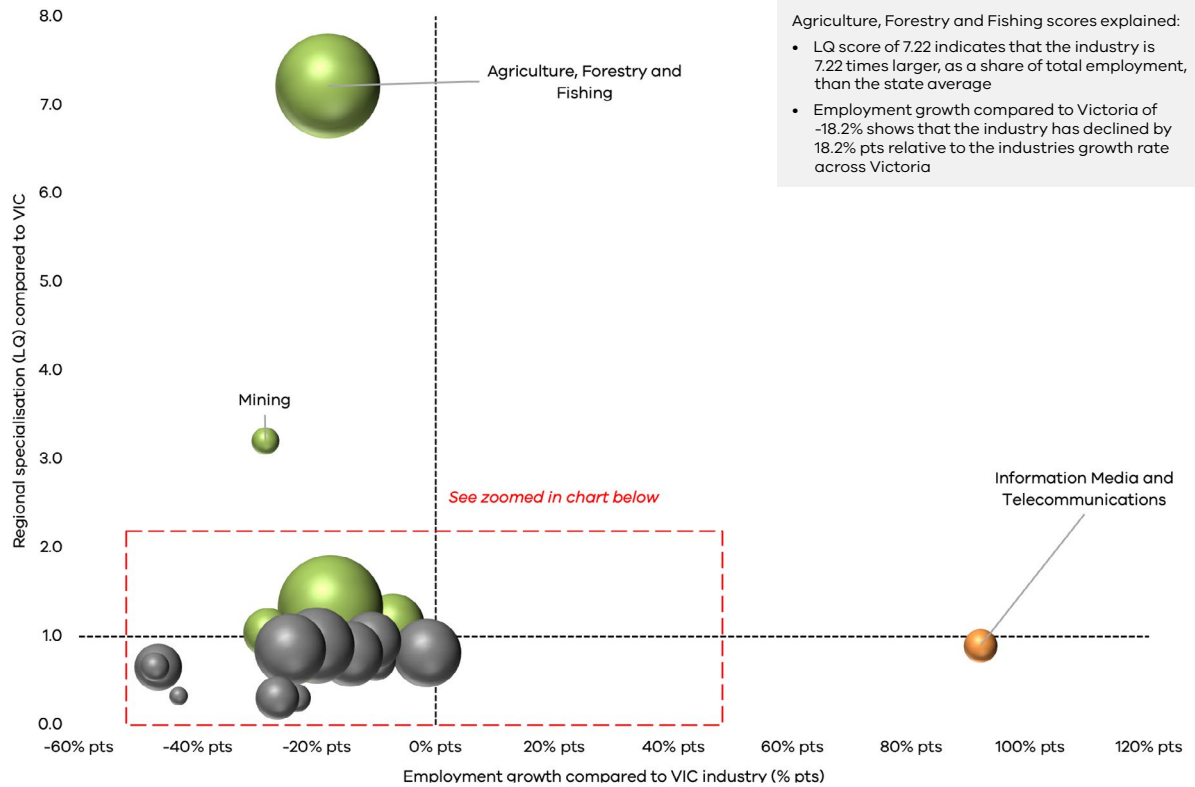
The position on the vertical axis indicates the industry's degree of employment specialisation (location quotient)¹ relative to the Victorian economy. For example, a value of 4.0 means that, as a share of total employment in the local economy, the industry employs four times as many people than the Victorian average². The position on the horizontal axis indicates the difference in each industries' employment growth (2015 to 2020³) between the region and the Victorian average. For example, a 5 per cent value indicates that regional employment in the industry has grown 5 percentage points faster (between 2015 and 2020) relative to the industry's average growth rate in Victoria. The size of each bubble indicates the share of the region's workforce employed in the industry.

1. The Location Quotient tells us how regions compare to that of the broader economy in terms of size. Where there is variation in size relative to the broader economy, LQ can be an indicator of strength and 'importance' to the future of the economy. However, it is only one indicator and further analysis is needed to determine if the industry warrants future investment and attention by government. Furthermore, LQ does not tell us if a high LQ industry is a driver or a consequence of growth. This is important because an industry may only exist as a consequence of government funding (as is the case for correctional facilities/prisons) and not because of the private market's demand for its goods and services. While there may be policy or other reasons to support these industries, these reasons may not be overtly economic in nature.

2. The comparator region used is the Victorian economy excluding the regional partnership to greater reflect the comparison to the region's economy.

3. Estimates of industry employment in 2020 include early impacts of COVID-19. While this may subdue the net growth between 2015–2020, it does not affect the comparative growth metrics used in this analysis.

Figure 1.1.1: Location Quotient (Employment)



(NIEIR, 2020)



As represented in Figure 1.1.1, the region is specialised in Agriculture, Forestry and Fishing; Mining; and Health Care and Social Assistance. These industries represent over 35 per cent of the region's employment, with both contributing just over 17 per cent.

Among subindustries, Hospitals; Social Assistance Services; Public Administration; Food Product Manufacturing; Motion Picture and Sound Recording Activities; Machinery and Equipment Wholesaling; Accommodation; Metal Ore Mining and Basic Material Wholesaling also recorded strong employment specialisation alongside the more traditional agriculture sub-sectors. Given Wimmera Southern Mallee's relatively small employment base, subindustries that reveal themselves as specialisations should be considered in the context of the scale of the industry in the region.

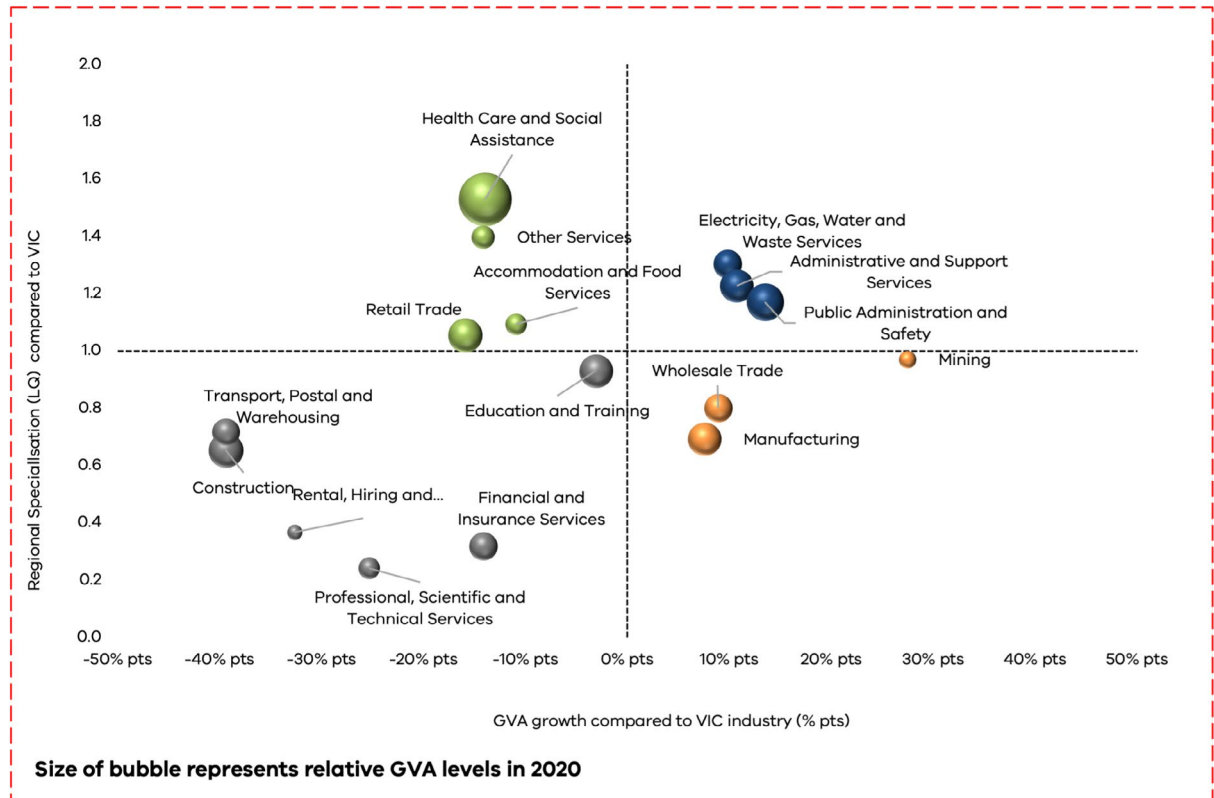
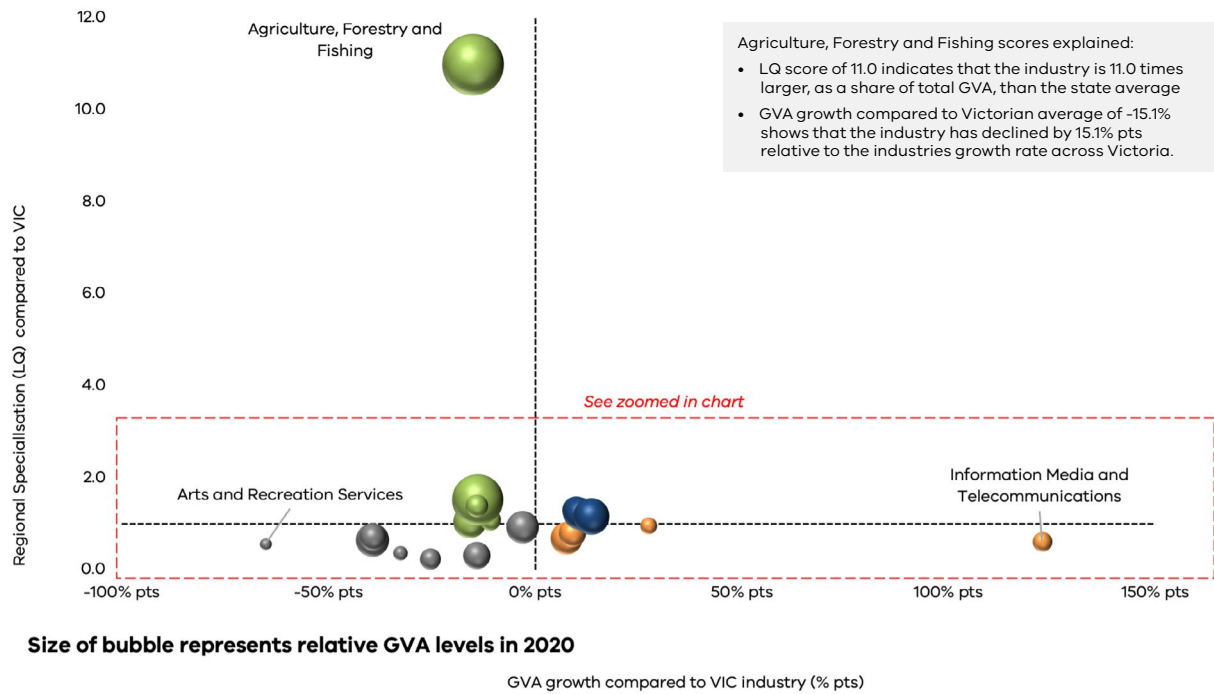
Over the past five years, the region has not seen employment growth outpace the state average in any of its sectors. This is not unexpected given the region has experienced a declining population. Among industries which lagged average employment growth for the state, three industries had a LQ score between 1.00 and 1.25. While these industries are slightly more concentrated than the state average, the difference is not sufficiently great to be defined as a regional specialisation.

When metropolitan Melbourne is excluded, and the region is compared with the rest of regional Victoria, the region demonstrates employment specialisations in Agriculture, Forestry and Fishing, Wholesale Trade and Information Media and Telecommunications. As governments and local leaders plan for the region's future economic direction, it is important to consider Wimmera Southern Mallee's position both within regional Victoria and the state.

LQ analysis, GVA

Figure 1.1.2 (below) identifies Wimmera Southern Mallee's economic output specialisations in terms of Gross Value Added (GVA). Using the same approach as above, this analysis compares industries' size and growth as a proportion of total economic output relative to Victorian averages. While the employment LQ captures the industry concentration of the regional workforce, it does not capture the economic contribution of employment in terms of output. The GVA LQ analysis provides this insight. The position on the vertical axis indicates the industry's degree of GVA specialisation relative to the Victorian economy. For example, a value of 2.0 means that, as a share of the total GVA in the local economy, the industry is two times larger than the Victorian average. The position on the horizontal axis indicates the difference in each industries' GVA growth (2015 to 2020) between the region and the Victorian average, the size of each bubble indicates the share of the region's GVA produced by the industry.

Figure 1.1.2: Location Quotient (GVA)



(NIEIR, 2020)

As represented in Figure 1.1.2, the region is specialised in Agriculture, Forestry and Fishing; Electricity, Gas, Water and Waste services; Health Care and Social Assistance; and Other Services.

The Health Care and Social Assistance, Agriculture, Forestry and Fishing and Other Services sectors recorded falls in GVA relative to the state average, in the five years to 2020, in contrast, Electricity, Gas, Water and Waste services experienced a rise in GVA compared to the Victorian industry average.

At a subindustry level, Wimmera Southern Mallee is also specialised in Motion Picture and Sound Recording Activities; Water Supply, Sewerage and Drainage Services; Food Product Manufacturing; Social Assistance Services; Repair and Maintenance Services; Hospitals; Accommodation; Basic Material Wholesaling; Preschool and School Education; Food Retailing; Road Transport; Machinery and Equipment Wholesaling; Waste Collection, Treatment and Disposal Services; Administrative Services and Public Administration alongside the more traditional agriculture and mining sub-sectors.

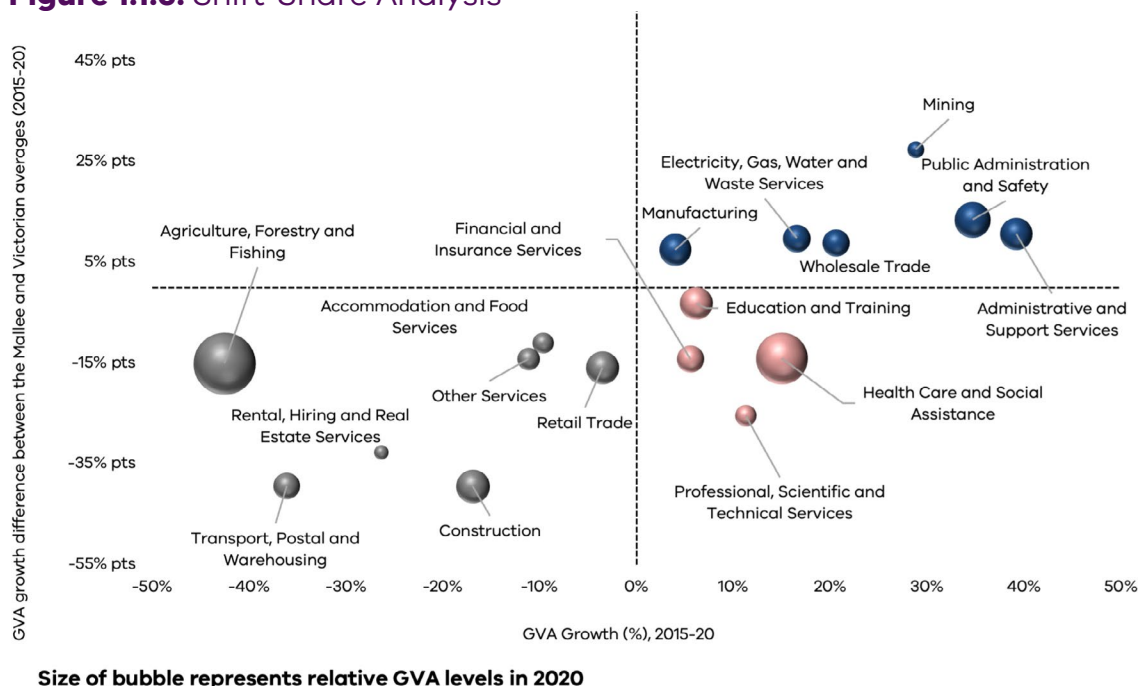
Shift-Share Analysis

Shift-Share Analysis is used to better understand the drivers of regional economic growth. The analysis breaks industry growth into two drivers of change: (1) a Victorian state industry effect and (2) a local effect. By decomposing the drivers, the analysis identifies whether an industry's growth reflects its performance across the region or whether its growth is more a result of broader trends.

Depicted in Figure 1.1.3 below, industries are divided into three colour groups:

- Blue industries which are outperforming the average industry growth rate in Victoria
- Pink industries which are underperforming the average industry growth rate in Victoria but are producing greater output over time
- Grey industries which are underperforming the average industry growth rate in Victoria and are declining in output production over time.

Figure 1.1.3: Shift-Share Analysis



(NIEIR, 2020)

The position on the vertical axis indicates the difference in each industry's average GVA growth (2015-2020) between the region and the Victorian average. The position on the horizontal axis indicates the amount each industry in the region has grown or declined between 2015 and 2020. The size of each bubble indicates the amount of output produced in the industry.

Relative to the Victorian average, seven (of 19) industries outperformed the average growth across the state, led by Information Media and Telecommunications (+122.6% pts) (Noting this industry in Wimmera Southern Mallee comes off a very low base). Furthermore, 11 sectors saw overall GVA growth between 2015 and 2020.

The region exhibits further strengths among its subindustries. Over the past five years, Motion Picture and Sound Recording Activities; Waste Collection, Treatment and Disposal Services; Machinery and Equipment Wholesaling; Public Order, Safety Design and Related Services; Administrative Services; Water Supply, Sewerage and Drainage Services; Food Product Manufacturing and Social Assistance Services all outperformed the state's average growth rate.

Strong results across a diverse range of sectors indicates the comparative strength of the Wimmera Southern Mallee region. Outperforming state averages demonstrates that there are many regional characteristics that contribute to the region's success. These should be leveraged to support future economic opportunities.

Industry Cluster Analysis

Cluster Analysis is used to help identify industries which may have a comparative advantage. Understanding the networks of businesses which create wealth in the region assists in determining the factors which makes a region successful and the strengths which can be leveraged to pursue future economic opportunities. Industry clusters can be supported by a range of conditions:

- **Factor conditions:** Businesses located near each other enjoy low-cost transportation of basic factors, such as raw materials and other physical resources. Advanced factors, such as knowledge and 'the business spirit', are also likely to be shared by businesses operating in close proximity.
- **Demand conditions:** Proximity to a sizeable and sophisticated local market can encourage businesses to compete for customers by providing quality and personalised service.
- **Related and supporting industries:** Businesses can focus on reducing costs by efficiently improving their production process if supplementary suppliers are nearby.
- **Company strategy, structure, and rivalry:** Businesses can gain from constructive rivalry if they learn from opportunities i.e. niche information, shared resources, or ideas, and if they can strategically innovate from rival threats.⁴

In Table 1.1.4 below, each industry's employment LQ and business count LQ are presented to help identify clusters. A score above 1.25 is considered the benchmark for an industry cluster.

4. Porter, M. (1998). Clusters and the new economics of competition. Harvard Business Review, 76 (6), 77 -90

Table 1.1.4: Industry Cluster Analysis

Sector	LQ (Employment)	LQ (Business count ⁵)	Clusters
Agriculture, Forestry and Fishing	10.99	8.06	✓
Mining	0.97	1.61	?
Manufacturing	0.69	0.70	×
Electricity, Gas, Water and Waste Services	1.30	1.19	?
Construction	0.65	0.57	×
Wholesale Trade	0.80	0.55	×
Retail Trade	1.05	0.91	×
Accommodation and Food Services	1.09	0.88	×
Transport, Postal and Warehousing	0.72	0.56	×
Information Media and Telecommunications	0.62	0.25	×
Financial and Insurance Services	0.32	0.58	×
Rental, Hiring and Real Estate Services	0.37	0.78	×
Professional, Scientific and Technical Services	0.24	0.29	×
Administrative and Support Services	1.23	0.37	×
Public Administration and Safety	1.17	0.38	×
Education and Training	0.93	0.38	×
Health Care and Social Assistance	1.53	0.33	?
Arts and Recreation Services	0.57	0.61	×
Other Services	1.40	0.99	?

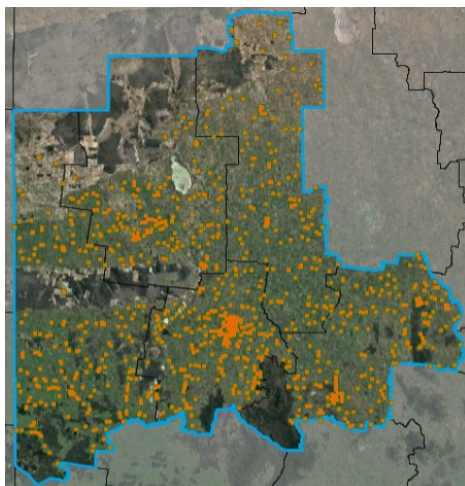
(ABS, 2021) (NIEIR, 2020)

With higher concentrations than the state average, the region has strong business and employment clusters in Agriculture, Forestry and Fishing.

While the region has employment specialisation in Electricity, Gas, Water and Waste Services and Health Care and Social Assistance, it does not appear to correlate with a high concentration of businesses. This is likely due to the nature of these industries in which single businesses, or perhaps businesses headquartered outside of the region, employ large amounts of residents.

It is important to note however that while the data does not highlight more clusters, they may still be present. By considering the benefits of clustering at a more granular level i.e. subindustry or defined geography, there remains significant scope to explore how clusters may support economic opportunities in the region.

5. Business count sourced from REMPLAN and includes all active GST trading businesses with the exception of family trusts and self-managed superannuation funds

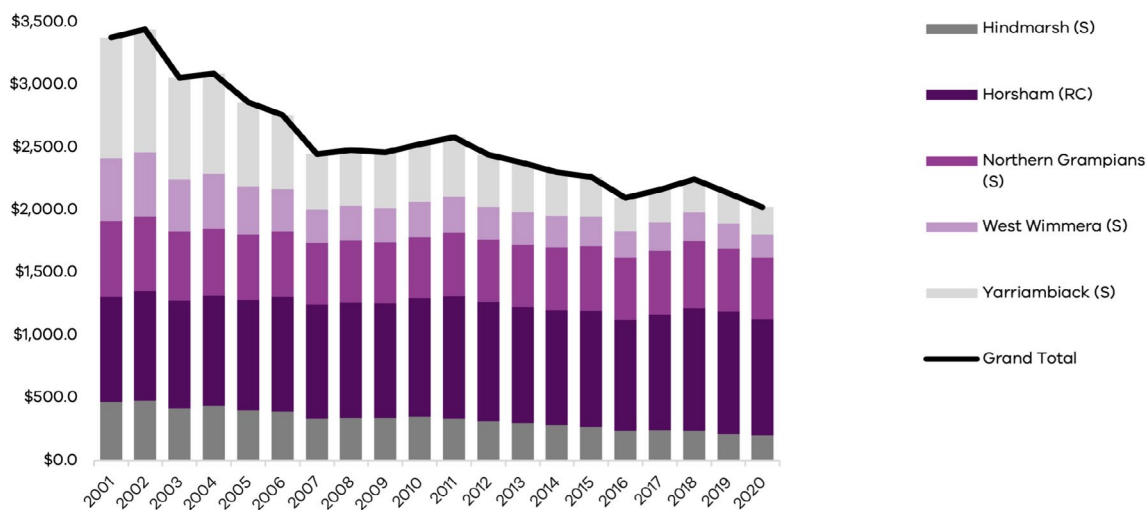
Figure 1.1.5: Cluster mapping**Agriculture businesses**

(REMPPLAN, 2021)

Gross Value Add

Since the turn of the century, the Wimmera Southern Mallee region's Gross Value Add (GVA) has declined steadily. Between FY2002 and FY2007, GVA fall was the most significant, declining from \$3.1 billion to \$2.4 billion, likely due to impact of the Millennium drought. Wimmera Southern Mallee experienced periods of growth between FY2007 and FY2011, and FY2016 and FY2018, however over the past two decades growth has contracted from \$3.4 to \$2 billion. This has occurred alongside a declining population in the region. Across LGAs, GVA declines have not been consistent. Yarriambiack, Hindmarsh and West Wimmera shires have seen GVA more than halve over the past 20 years. In comparison, Northern Grampians has realised modest falls, while Horsham has observed slow but steady increases in GVA.

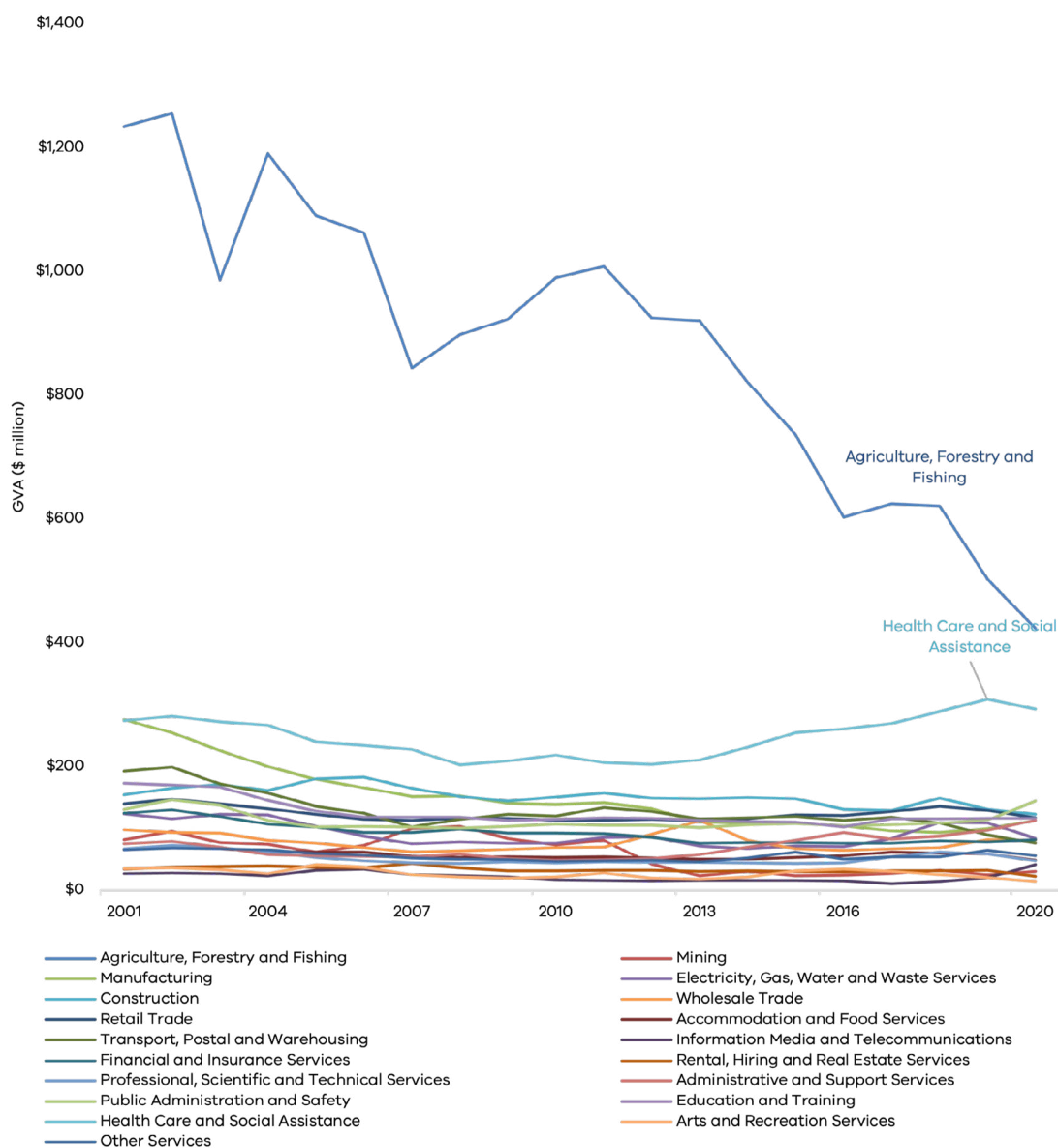
Horsham's contrasting GVA experience reflects the LGA's relative economic diversity. As the region's major hub, the rural city does not rely as heavily on traditional agriculture and manufacturing sectors to support its economy.

Figure 1.1.6: GVA over time by LGA

(NIEIR, 2020)

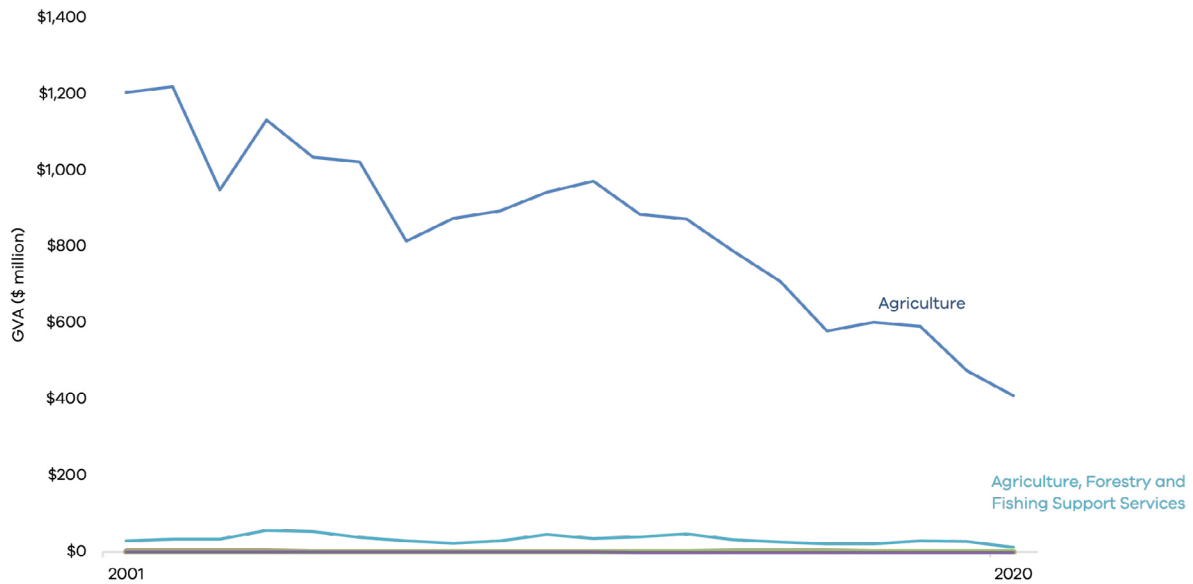
Agriculture, Forestry and Fishing has seen significant falls in GVA. Despite this, the industry remains the largest contributor to Wimmera Southern Mallee's economic output. Health Care and Social Assistance experienced notable growth since 2001 and is now the second largest industry in the region (see Figure 1.1.7). Retail Trade, Public Administration and Construction are the third, fourth and fifth largest industries.

Figure 1.1.7: GVA by industry



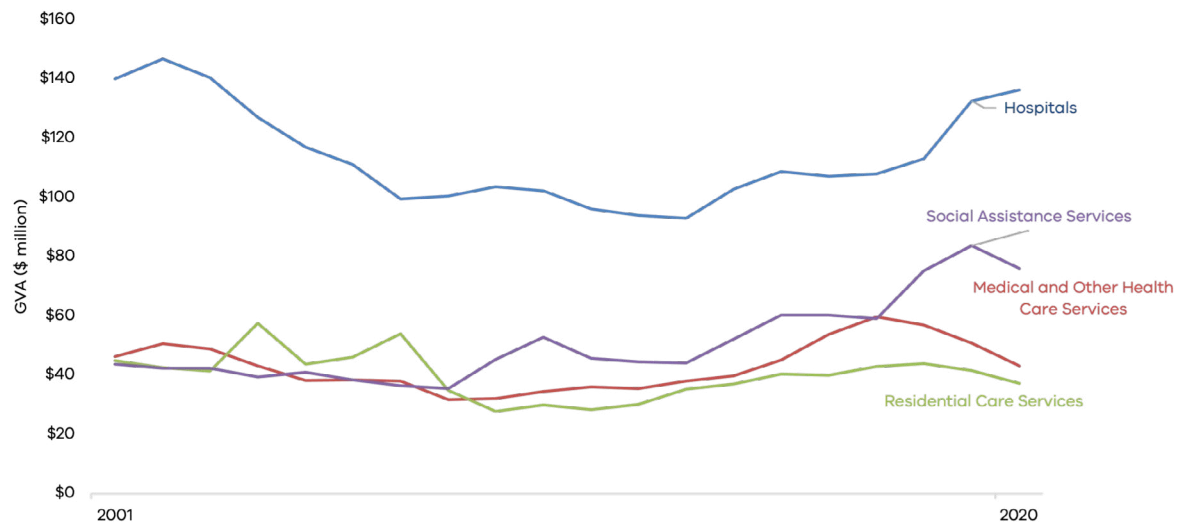
(NIEIR, 2020)

At a subindustry level, Agriculture is the most significant contributor to GVA despite consistent falls in value (see Figure 1.1.8). Primary produce for the region includes grains, sheep meat and wool.

Figure 1.1.8: Agriculture, Forestry and Fishing GVA

(NIEIR, 2020)

Consistent with the rest of the state, and partially explained by demographic shifts towards an ageing population, the Health Care and Social Assistance subindustries have realised GVA growth over the past ten years. Gains have been driven by Social Assistance Services until 2019 and more recently, hospitals (see Figure 1.1.9).

Figure 1.1.9: Health Care and Social Assistance GVA

(NIEIR, 2020)

Business growth

Over the past five years, more than 940 new businesses have established themselves in the Wimmera Southern Mallee region, mostly concentrated around Horsham and, to a lesser extent, Stawell. By industry, the highest proportion were in Agriculture, Forestry and Fishing (over 27 per cent or 261 businesses) and Construction (14 per cent or 137 businesses). At a subindustry level, 68 per cent (or 178) of new agricultural businesses were in Grain-Sheep or Grain-Beef Cattle Farming or Other Grain Growing.

Other industries of significant business growth are:

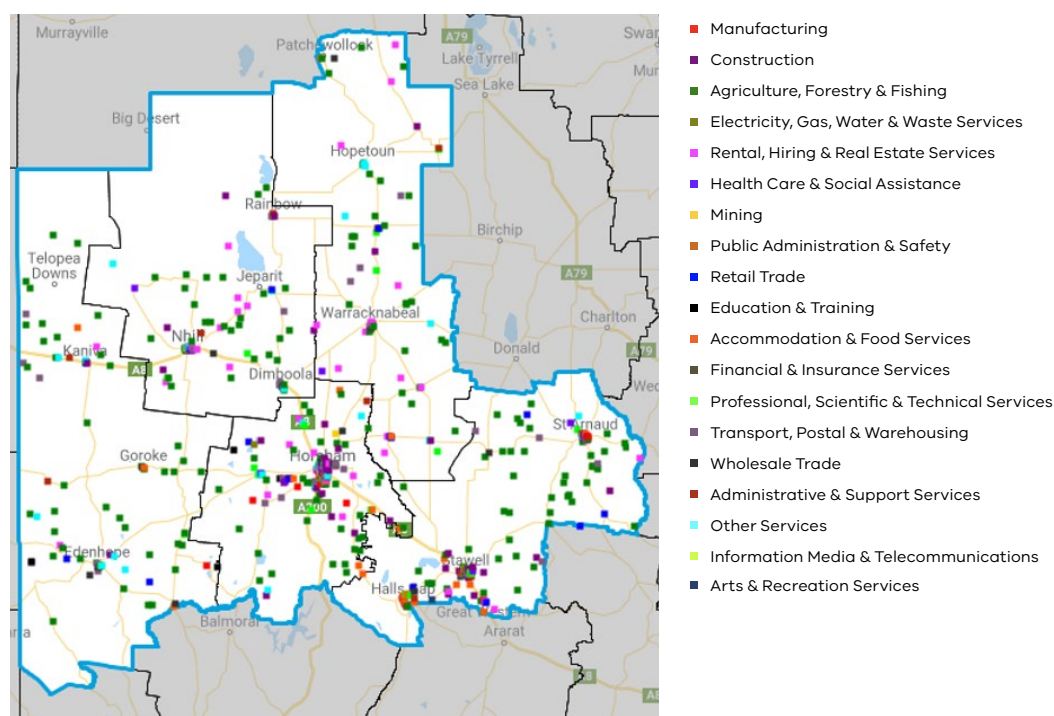
- Accommodation and Food Services (76 new businesses),
- Transport, Postal and Warehousing (71 new businesses),
- Rental, Hiring and Real Estate Services (69 new businesses), and
- Other Services (67 new businesses).

Among subindustries, significant business growth has occurred among:

- Non-Residential Property Operators (50 new businesses),
- Road Freight (34 new businesses),
- Other Agriculture and Fishing Support Services (30 new businesses), and
- Cafés and Restaurants (27 new businesses).

Note that business growth does not indicate the size of businesses.

Figure 1.111: Business Entries (September 2015 to September 2020)



Source: (REMPLAN, 2021)

International Exports⁶

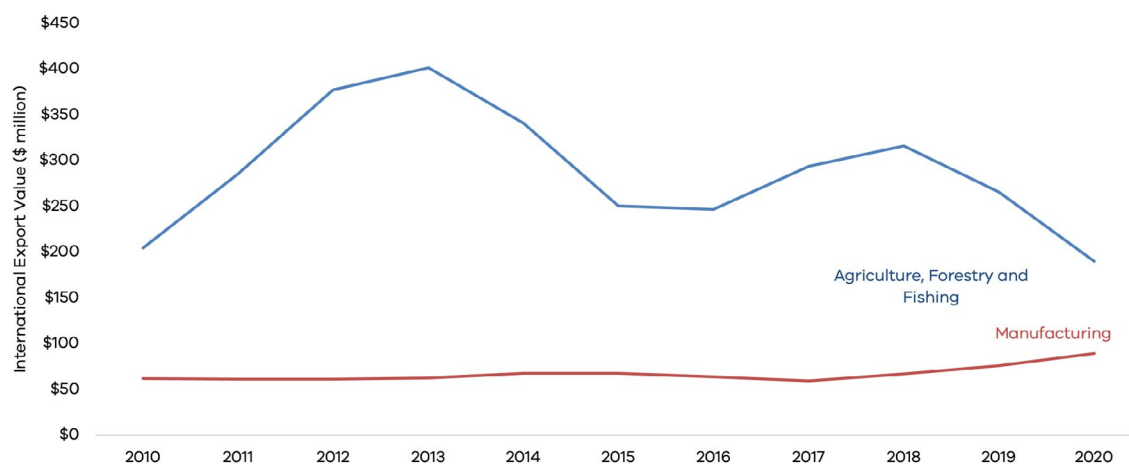
Serviced by the Western, Henty and Wimmera Highways, the region is connected to export gateways in Adelaide, Melbourne, Geelong and Portland. Over the past decade, the region's international export value has fluctuated from \$329.0 million in 2010 to \$349.6 million in 2020.

Representing 54.4 per cent of total value in 2020, agricultural products are the region's most significant exports, peaking in 2013 at \$401.3 million in value, and down from a second peak of \$316.4 million in 2018 due largely to the impact of drought and record-high water prices, and subsequently exacerbated by early impacts of COVID-19 and China's imposition of trade restrictions on key Australian commodities, including barley. Grains (including cereals, pulses, legumes, and oilseeds), sheep meat and wool are the region's most valuable agricultural products. China, Indonesia, and Vietnam are top grain markets while the United States leads China and Japan as most significant sheep markets and wool heads to China, Italy and India.

Manufacturing is the region's second largest export industry, contributing \$89.3 million in value in 2020. The sector's steady growth reflects an emerging Food Product Manufacturing subindustry, contributing 81.2 per cent of total Manufacturing exports. The region is serviced by food processing centres in Stawell, Nhill and Horsham.

The two major sectors comprised 80.0 per cent of total export value in 2020. Other smaller but relatively significant sectors are Accommodation and Food Services (worth \$18.7 million in export value in 2020), Wholesale Trade (worth \$12.9 million) and Transport, Postal and Warehousing (worth \$9.9 million).

Figure 1.1.12: International Export Value, Key Industries



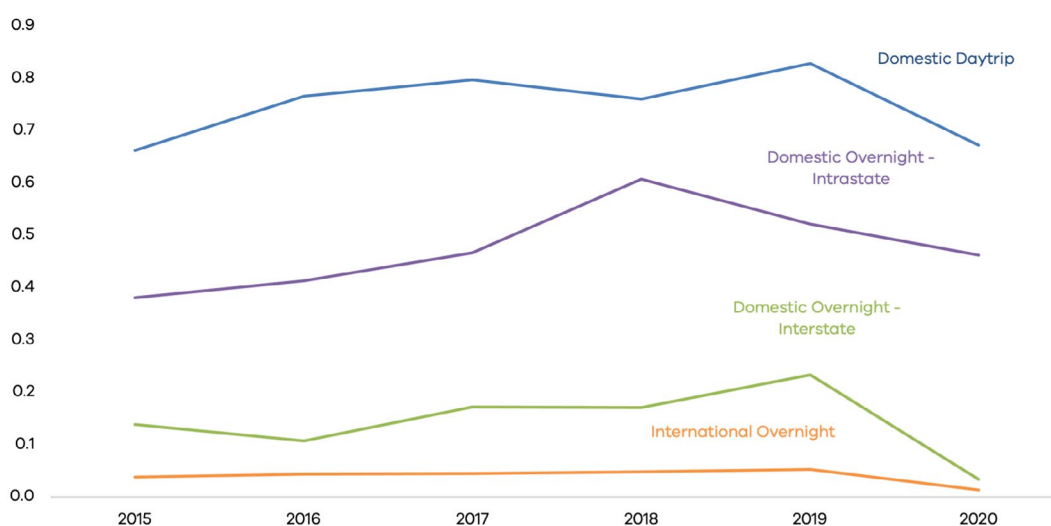
Sources: (NIEIR, 2020)

6. International Exports regional insights sources: (NIEIR, 2020), (Geelong Port, 2021), (Agriculture Victoria, 2018a), (Agriculture Victoria, 2018b) and (Agriculture Victoria, 2018c)

Visitor Economy

Home to Grampians National Park (Gariwerd) and a range of other attractions including the silo art trail and recreational lakes, tourism is a significant contributor to the region's economy, particularly for Northern Grampians Shire. Prior to COVID-19, visitor numbers and expenditure were growing year-on-year (see Figure 1.1.13). Domestic daytrips visitors have been the most common category of visitation, followed by domestic intrastate overnight visitors. However, restrictions associated with COVID-19 including international and state border closures, stay-at-home orders and density limits have impacted the region's visitor economy. The total number of domestic daytrip, and domestic and international overnight visitors fell from 1.6 million in 2019 to 1.2 million in 2020. This decline led to a fall in total visitor expenditure; from \$391 million in 2019 to \$276 million in 2020. Despite the easing of restrictions and vaccine rollout, the pandemic is likely to have lasting effects on visitation patterns to the region.

Figure 1.1.13: Visitation Overview (2015–2020)⁷



Source: (Tourism Research Australia, 2021a)

Due to its relatively low number of international visitors, the impact of the pandemic on the region's visitor economy has been less pronounced than for other regions. In 2019, 82.6 per cent of total visitation came from domestic day-trippers and domestic intrastate overnight visitors. These visitation categories fell by 18.9 per cent and 11.4 per cent respectively, far less than the 43.5 per cent and 40.4 per cent falls respectively across regional Victoria as a whole.

As Australia's vaccine rollout progresses and international travel is more limited, the region has the opportunity to capture tourism demand from those seeking to substitute overseas holidays. To a certain extent, the region is already realising these benefits; average visitor spend among domestic intrastate tourists is substantially higher in 2020 than 2019, in part due to increases in the average length of time these visitors are staying in the region. Since the region shares a border with South Australia, it is well positioned to attract higher spending and longer staying overnight visitors.

7. From 2021, tourism data for Regional Partnership regions are defined based on SA2 boundaries while prior data is based on LGA boundaries therefore estimates may slightly differ.

Table 1.1.14: Visitation & Average Spend (2019 – 2020)⁸

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
Domestic Daytrip	828,000	671,000	\$116	\$114
Domestic Intrastate Overnight	521,000	462,000	\$293	\$388
Domestic Interstate Overnight	233,000	N/A*	\$537	N/A*
International Overnight	52,000	13,000	\$324	\$291

Source: (Tourism Research Australia, 2021a)

*Note: due to low sample size some Figures are not available for publish.

Most of the region's tourism businesses are small enterprises. In 2019, there was 611 tourism businesses across the region. Of these, 75.7 per cent have four employees or fewer, with 38.9 per cent sole proprietors. Just 3.4 per cent of businesses have 20 or more employees.

Table 1.1.15: Average Number of Tourism Businesses (2016–2019)

Local Government Area	Tourism Businesses
Hindmarsh	62
Horsham	268
Northern Grampians	167
West Wimmera	51
Yarriambiack	63
Total	611

Source (Tourism Research Australia, 2020)

8. From 2021, tourism data for Regional Partnership regions are defined based on SA2 boundaries while prior data is based on LGA boundaries therefore estimates may slightly differ.

1.2 Demographic Profile

Over the past 20 years, Wimmera Southern Mallee has experienced steady population decline and ageing. Notwithstanding the impacts of COVID-19, these trends are expected to continue.

- Horsham is the only LGA to have realised growth. This trend reflects the growing liveability appeal and economic performance of regional cities.
- Between 2019 and 2020, the most important contributor towards the region's population growth was the inflow of overseas migrants however, this has been offset by outflow of local residents from the region as well as natural declines.
- The enduring nature of population changes due to COVID-19 are yet to be determined and as such, the impact on economic activity yet to be fully understood.

Outflows of local residents have been led by the out migration of young people (aged 15 to 24 years) but also those aged 25 to 44 years and those aged 65 years and above.

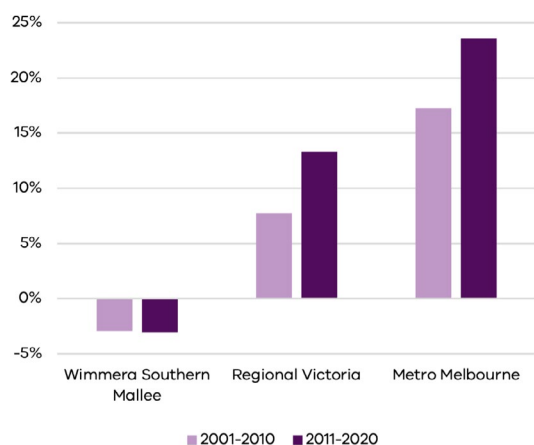
- The outflow of young people is consistent with trends across regional Victoria and is likely to reflect lower access to employment, training, and education pathways.
- Combined with the outflow of the 25 to 44 years age cohort, internal migration is having a significant impact on the region's working age population. This movement may reflect the region's economic performance and therefore declining appeal for families and maturing workers to live and work.

Population and population growth

In 2020, Wimmera Southern Mallee was home to an estimated resident population of 47,411 people. 20,018 (42 per cent) lived in Horsham; 11,403 (24 per cent) in Northern Grampians; 6,588 (14 per cent) in Yarriambiack; 5,592 (12 per cent) in Hindmarsh; and 3,810 (8 per cent) in West Wimmera.

The Wimmera Southern Mallee's population declined by 3.0 per cent between 2001 and 2010 and by 3.1 per cent between 2011 and 2020 (see Figure 1.2.1). The region is the only Regional Partnership region to have experienced population declines over the past 20 years. Population was forecast to continue to decline however, the impacts of COVID-19 on domestic and international migration is likely to alter previous forecasts (see Figure 1.2.2). All LGAs, excluding Horsham as the region's major socioeconomic centre, have experienced population decline (see Figure 1.2.3).

Figure 1.2.1: Population Growth



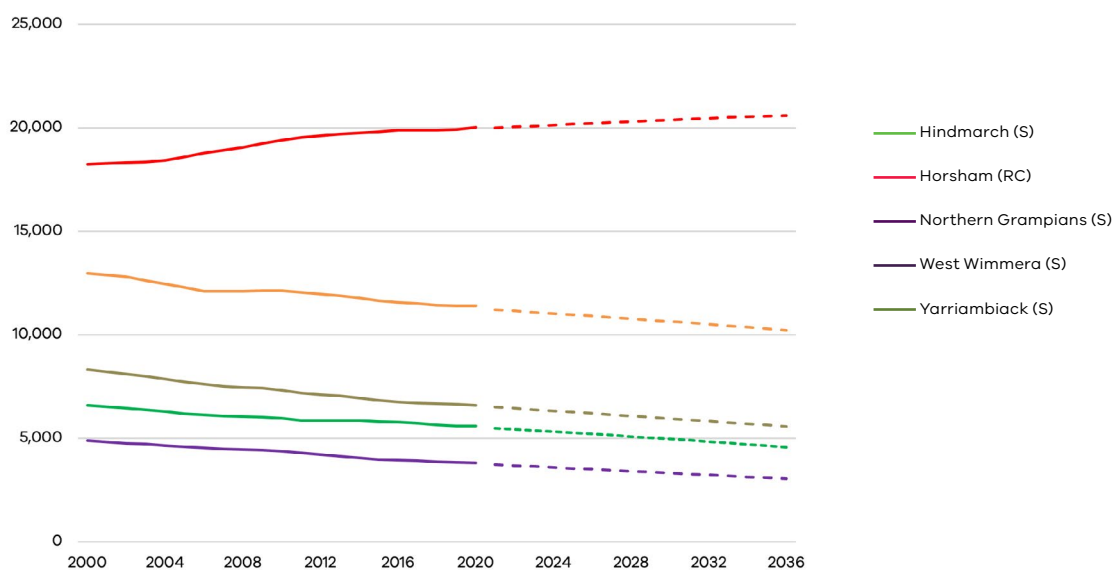
Source: (Australian Bureau of Statistics (ABS), 2020a)

Figure 1.2.2: Population Forecast



Source: (Department of Environment, Land, Water and Planning (DELWP), 2019)

Figure 1.2.3: Population Growth by LGA (2000–2036)



Source: (Australian Bureau of Statistics (ABS), 2020a) (Department of Environment, Land, Water and Planning (DELWP), 2019)

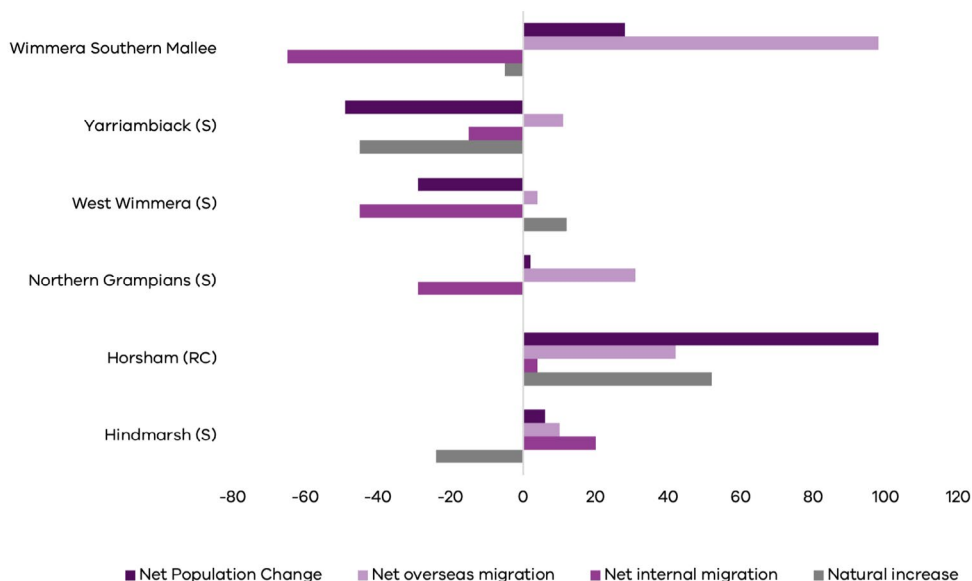
Components of population change

Between 2019 and 2020, population decline in Wimmera Southern Mallee was driven by negative net internal migration (NIM) and natural decreases. These falls have been partly offset by positive net overseas migration (NOM) (see Figure 1.2.4).

Despite overall trends of decline, the region realised minor overall population growth between 2019 and 2020 due a significant inflow of overseas migrants. At an LGA level, there is no consistent pattern across the region. Horsham drove the region's population increase, gaining from natural increases, overseas migration, and a small amount of domestic migration. Hindmarsh is the only other LGA to have experienced a net inflow of people from within Australia. Alongside Northern Grampians, it experienced a small degree of population growth. Unlike Hindmarsh, Northern Grampians relied exclusively on an inflow of overseas migration to offset the outflow of local residents and zero natural growth (births minus deaths). Meanwhile, West Wimmera and Yarriambiack experienced population declines due to the outflow of local residents and, in the latter case, natural decreases (deaths exceeding births).

Population change across the region is varied. As government and local leaders plan for growth, it is important to recognise that the magnitude and drivers substantially differ across the region's LGAs, and therefore policy responses should vary. Furthermore, the impacts of COVID-19 are likely to be differentially experienced across regional communities.

Figure 1.2.4: Population Change by Components (2019–2020)

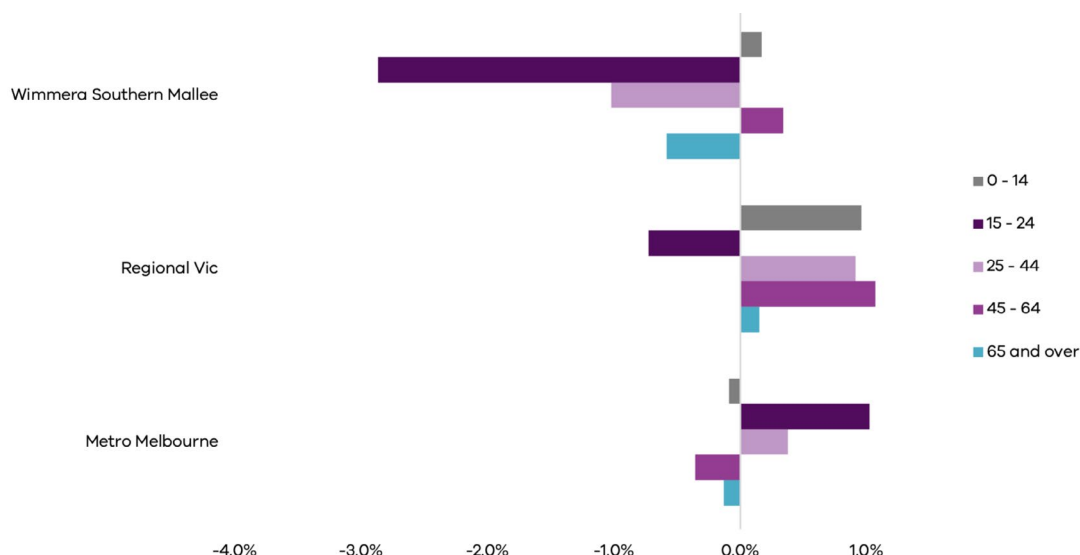


Source: (ABS, 2021)

Regional internal migration

Over a three-year period, the key driver of declines has been the significant outflow of younger people (15 to 24 and 25 to 44 years age cohorts) leaving the region (see Figure 1.2.5). While the trend of outflows in the 15 to 24 years age cohort is common across regional Victoria, regional areas do not typically experience outflows of the 25 to 44 years age cohort and those aged 65 years and over. This could reflect the economic challenges the region has faced in recent years with falling GVA and low employment growth. Furthermore, older residents could be looking to larger regional centres in retirement to downsize their homes while gaining better access to healthcare and other amenities.

Figure 1.2.5: Net Internal Migration (Proportion by Age Group), Annual Average (2016–2019)



Source: (ABS, 2020b)

Note: data indicates average migration as a proportion of 2016 population by age group. Data refers to domestic / internal migration in Australia.

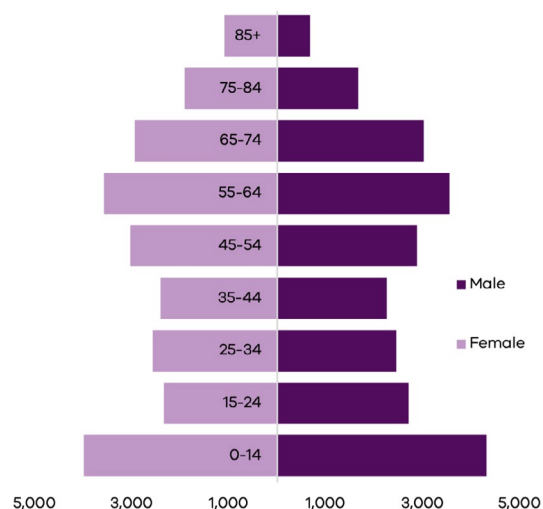
Note: the ABS time series of internal migration is broken at 2016 to align with new statistical regions. 2016–18 insights are consistent with the movements represented in previous statistical regions where alignment is possible.

Note: where relevant, LGAs have been grouped to most closely match the 2016 ABS statistical region (at SA3 level) for this measure of regional internal migration. In this case, the entire region is captured by Grampians SA3.

Population cohort analysis

The Wimmera Southern Mallee's population is 50.3 per cent female and 49.7 per cent male. With a median age of 46 years, the Wimmera Southern Mallee is the oldest Regional Partnership region. The median age is older than that of regional Victorian (42 years) and significantly older than that of metropolitan Melbourne (36 years). The working aged population (15 to 64 years) comprises 58.6 per cent of the population and 23.9 per cent of the population are 65 years or older. As the population ages and younger people leave the area, the proportion of older residents is expected to increase (see Figure 1.2.6).

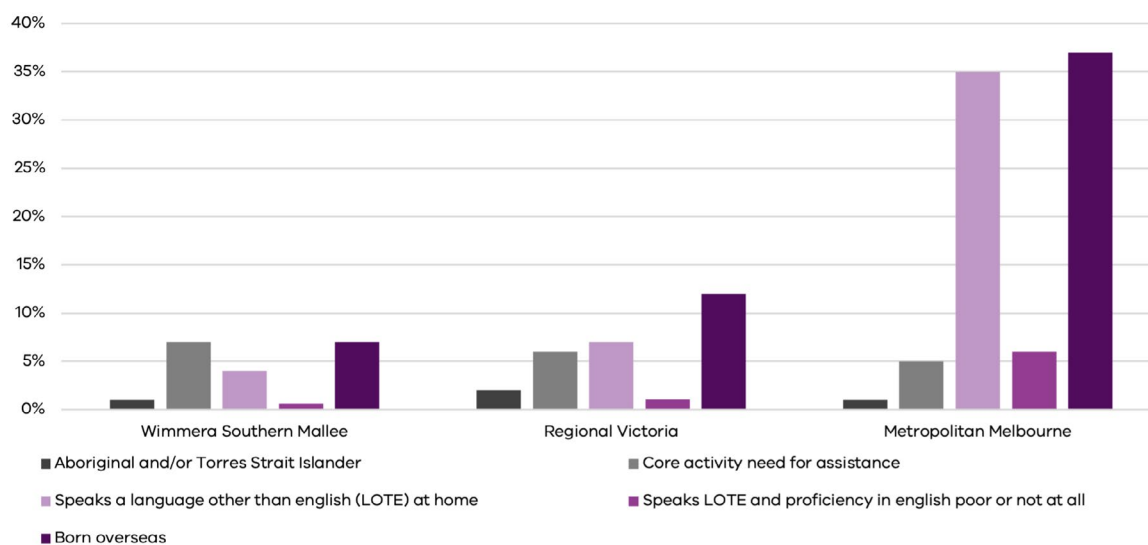
Figure 1.2.6: Population by Age



Source: (ABS, 2020c)

1.4 per cent of the region's population are Aboriginal and Torres Strait Islander while 7.5 per cent live with a disability. The proportion of Aboriginal and Torres Strait Islanders is below regional averages but exceed metropolitan Melbourne, while the proportion of those living with a disability is higher than both comparators. Wimmera Southern Mallee has a relatively low proportion of culturally and linguistically diverse (CALD) people; 3.7 per cent of the population speak a language other than English at home; 0.6 per cent speak a language other than English with poor to no proficiency in English; and 7.1 per cent are born overseas. All these measures are lower than regional Victorian averages, and significantly lower than metropolitan Melbourne averages (see Figure 1.2.7).

Figure 1.2.7: Population Cohorts



Source: (ABS, 2016a)

1.3 Socio-Economic Profile

Overall employment and economic output outcomes have not been equally realised across geographies and cohorts.

- As it relates to household incomes, socio-economic disadvantage and educational attainment, the Wimmera Southern Mallee tends to outperform regional Victorian averages.
- While those in Horsham City tend to be relatively well off, those in Hindmarsh, Northern Grampians and Yarriambiack shires tend underperform the region across all socio-economic measures.
- Relative to the general population rates in the region, local Aboriginal and Torres Strait Islanders have poorer outcomes across labour force engagement and income measures.
- In contrast, recent migrant communities tend to have stronger employment outcomes in terms of labour force participation, unemployment rate and incomes than the general population.

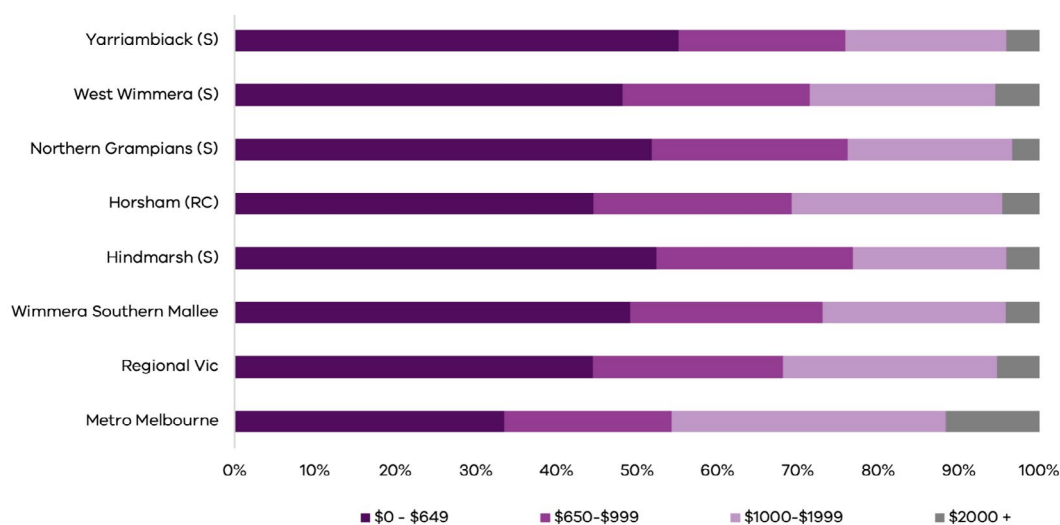
Variable outcomes across the region indicates that there remain significant opportunities to improve educational attainment, engage disadvantaged cohorts and lift wages.

Income

Relative to Victorian averages, Wimmera Southern Mallee has low average household incomes. Only 27 per cent of households earn at least \$1,000 per week (32 per cent in the case of regional Victoria and 46 per cent in the case of metropolitan Melbourne) and 49 per cent earn less than \$650 per week (45 per cent and 34 per cent in the cases of regional Victoria and metropolitan Melbourne respectively).

With more than half of households earning less than \$650 per week, Yarriambiack, Hindmarsh and Northern Grampians are lower income LGAs. Households in Horsham tend to have higher incomes, at rates consistent with regional Victorian averages.

Figure 1.3.1: Household Income Distribution (Weekly)



Source: (ABS, 2016b)

Education attainment

Broadly speaking, educational attainment in Wimmera Southern Mallee is lower than regional and metropolitan averages (see Figure 1.3.2). 59 per cent of the region's residents have not progressed beyond secondary school (50 per cent in the case of regional Victoria and 43 per cent in the case of metropolitan Melbourne) and only 13 per cent have attained a bachelor's degree or higher qualification (17 per cent in the case of regional Victoria and 31 per cent of Melburnians).

Educational attainment levels are likely to reflect the qualification levels required for many of the major employing industries in the region, namely Agriculture, Manufacturing and Construction. It is also likely to reflect the region's older demographic and the limited opportunities to acquire a higher education qualification locally.

However, there are intra-regional differences. Residents of Horsham tends to have higher levels of educational attainment, although at levels slightly under regional Victorian averages. Residents of Hindmarsh and Yarriambiack tend to have lower levels of educational attainment.

There are also differences between the sexes. Females in Wimmera Southern Mallee are twice as likely as males to have a bachelor's degree or higher qualification, while males are twice as likely to have a Certificate III or IV. While trends are consistent with comparator geographies, as it relates to tertiary education, sex-based educational disparities tend to be more pronounced in the Wimmera Southern Mallee than in regional Victoria as a whole and metropolitan Melbourne.

Figure 1.3.2: Educational Attainment (Highest Level)

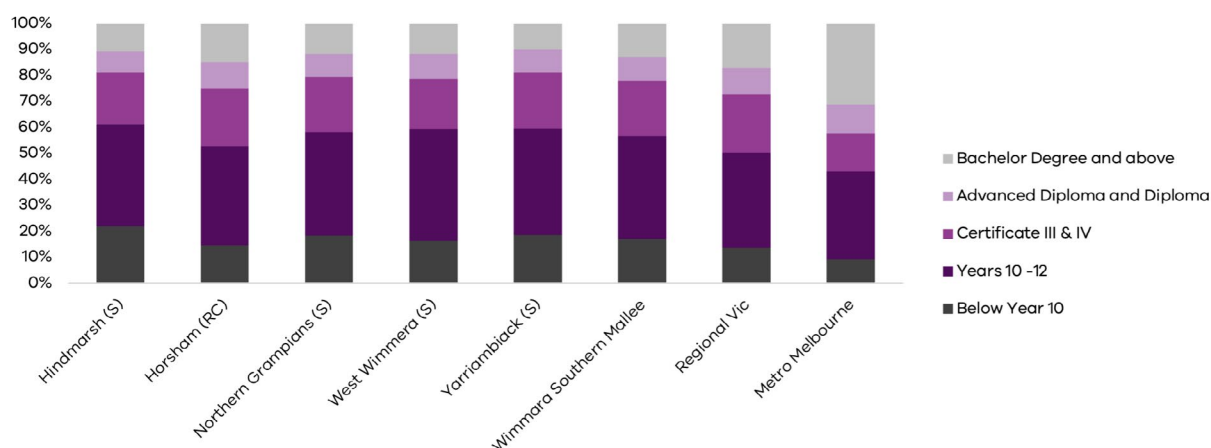


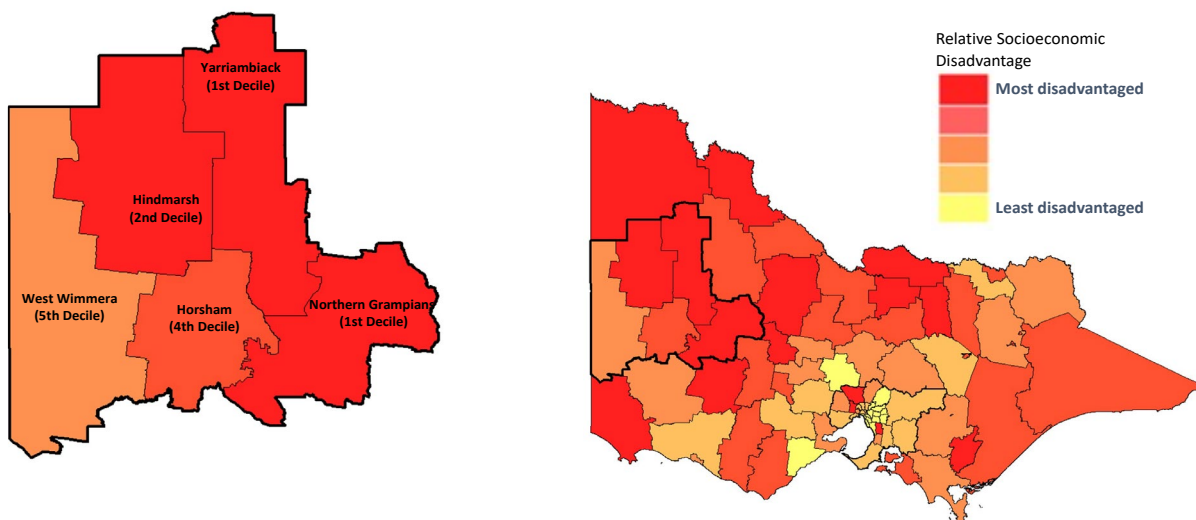
Figure 1.3.3: Educational Attainment (Highest Level) By Sex



Source: (ABS, 2016c)

Socio-economic Disadvantage

Map 1.3.4: Index of Relative Socio-economic Disadvantage (IRSD) Rankings (2016)



Source: (ABS, 2016d)

The Index of Relative Socio-economic Disadvantage (IRSD) is a general socio-economic index that summarises a range of information about the economic and social conditions of people and households within an area. The index provides an overall measure of the degree to which circumstances are unfavourable to socio-economic wellbeing and prosperity. It is calculated as part of the ABS Socio-economic Indexes for Areas (SEIFA) released with each Census.

Levels of socio-economic disadvantage differ across the Wimmera Southern Mallee however, all LGAs rank in the bottom half of most disadvantaged municipalities in Victoria. Northern Grampians, Yarriambiack and Hindmarsh LGAs are among the ten most disadvantaged LGAs in the state, while West Wimmera and Horsham rank just below the median.

Hindmarsh is the only LGA to have realised an improvement in relative level of disadvantage over time, while Yarriambiack and Horsham have deteriorated, and Northern Grampians and West Wimmera maintained the same position (see Table 1.3.5).

Table 1.3.5: LGA Relative IRSD Rankings (2011 and 2016)

Local Government Area	2016 Rank (of 80)	2016 Decile	2011 Rank (of 80)	2011 Decile	
Northern Grampians (S)	6	1	6	1	=
Yarriambiack (S)	7	1	14	2	▲
Hindmarsh (S)	10	2	9	2	▼
Horsham (RC)	30	4	36	5	▲
West Wimmera (S)	33	5	33	5	=

Sources: (ABS, 2016d) (ABS, 2011)

Recent migrant communities' economic opportunities

Recent migrants (those who arrived between 2011 and 2016) to the Wimmera Southern Mallee are less likely to be unemployed than the general population (8 per cent and 5 per cent respectively). In contrast, unemployment rates for recent migrants living in across regional Victoria or metropolitan Melbourne are significantly higher.

Recent migrants have a higher participation rate than the general population (73 per cent to 59 per cent) and recent migrant households are less likely to earn below \$650 a week.

While the sample size for recent migrants in the Wimmera Southern Mallee is relatively small (430 people), the results indicate strong employment outcomes.

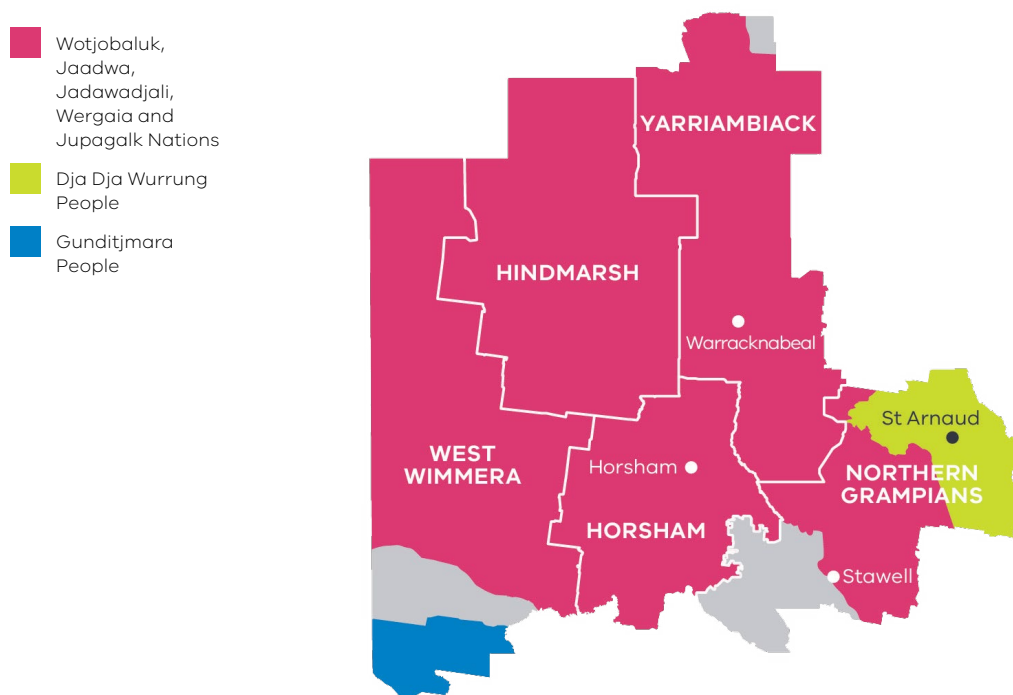
Table 1.3.6: Labour Market Analysis for Recent Migrants

Measure	Cohort	Regional Victoria	Metropolitan Melbourne	Wimmera Southern Mallee
Participation rate	Recent Migrants	63%	59%	73%
	General Population	61%	66%	59%
Unemployment rate	Recent Migrants	14%	17%	8%
	General Population	6%	7%	5%
Proportion of population with weekly personal income less than \$650	Recent Migrants	62%	66%	50%
	General Population	54%	48%	56%

Source: (ABS 2016e)

Aboriginal local communities and Traditional Owners

Figure 1.3.7: Illustrates the Traditional Owner groups present in the region.



(First Peoples State Relations, June 2021)

Aboriginal and Torres Strait Islanders⁹

Table 1.3.8 (below) indicates a range of measures which compares socio-economic outcomes for the broader Victorian population and for Aboriginal and Torres Strait Islanders. It shows that in each of the categories, the local Aboriginal and Torres Strait Islander population is more disadvantaged.

Aboriginal and Torres Strait Islanders in Wimmera Southern Mallee are more than three times as likely to be unemployed as the region's average (18.7 per cent unemployment rate compared to 4.9 per cent).

The labour force participation rate among Aboriginal and Torres Strait Islanders (44.3 per cent) is more than 15 percentage points lower than the average rate across the region. Aboriginal and Torres Strait Islander households are more likely to earn less than \$650 per week (66.6 per cent compared to 48.3 per cent).

Furthermore, 24.7 per cent of Aboriginal and Torres Strait Islander youth in Wimmera Southern Mallee are not engaged in work or study. This is significantly higher than the average rate of 11.8 per cent.

9. Analysis includes all persons who identified as Aboriginal and/or Torres Strait Islander in the region on Census night 2016.

Table 1.3.8: Aboriginal and Torres Strait Islander Analysis

Category	Measure	Victoria	Regional Victoria	Metro Melbourne	Wimmera Southern Mallee
Economic performance	Labour force participation rate (%)	64.5% ■	60.9% ■	65.8% ■	59.4% ■
	Aboriginal and Torres Strait Islander Victorians	57.8% ■	52.8% ■	62.4% ■	44.3% ■
	Unemployment rate (%)	6.6% ▲	5.9% ▲	6.8% ▲	4.9% ▲
	Aboriginal and Torres Strait Islander Victorians	13.9% ■	16.5% ■	11.8% ■	18.7% ■
Disadvantage and shared prosperity	Households earning less than \$650 per week (2016 dollars) (%)	34.8% ▼	43.1% ▼	31.8% ▼	48.3% ▼
	Aboriginal and Torres Strait Islander households	47.7% ▼	56.6% ▼	39.2% ▼	66.6% ■
	Children in jobless households (%)	16.4% ■	16.5% ■	16.3% ■	17.1% ▲
	Aboriginal and Torres Strait Islander children in households	36.3% ▼	40.9% ▼	31.4% ▼	
Cohesive and liveable communities	People aged 15+ who volunteer (%)	20.9% ▲	26.7% ▲	18.9% ▲	37.5% ▲
	Aboriginal and Torres Strait Islander Victorians	19.9% ▲	19.5% ▲	20.3% ▲	20.2% ▲
Skills and education	People aged 15–24 not engaged in work or study (%)	8.6% *	11.3% *	7.9% *	11.8% *
	Aboriginal and Torres Strait Islander Victorians	21.7% *	25.0% *	18.6% *	24.7% *

Notes: All Figures were calculated by aggregating Regional Partnership level data, to allow for comparison between each Figure. Accordingly, Figures for Victoria, Regional Victoria and Metro Melbourne may differ from headline Figures used by the Victorian Government.

Trend

(over five years, unless noted otherwise in the Data Dictionary):

▲ or ▼ **Favourable trend** – average annual movement of 1.0% or more

■ **Stable trend** – average annual movement of less than 1.0%

▲ or ▼ **Unfavourable trend** – average annual movement of 1.0% or more

* Trend not calculated as comparable time series data was unavailable.

Shading

(not applied where comparison between regions is uninformative):

■ More favourable than the corresponding regional Vic average – by 5.0% or more

■ Similar to the corresponding regional Vic average – difference is less than 5.0%

■ Less favourable than the corresponding regional Vic average – by 5.0% or more

(ABS Census, 2016)

1.4 Labour Market

While 74 per cent of the region's workforce is spread across seven industries, employment in the Wimmera Southern Mallee is highly concentrated in the Agriculture, Forestry and Fishing, and Health Care and Social Assistance sectors.

- Over the past ten years, the region has realised slight employment decline. Five industries have experienced increased worker numbers while fourteen have realised employment declines. The fastest growing industry is Information, Media and Telecommunications albeit off a very low base, whereas the Construction sector is the most notable growth industry.
- Despite slow growth over the past decade and notwithstanding the impact of the pandemic on future trends, 12 industries are forecast to increase worker numbers over the next five years, with the strongest growth predicted in the Health Care and Social Assistance sector.

Relative to regional and Victorian averages, the region exhibits mixed employment outcomes.

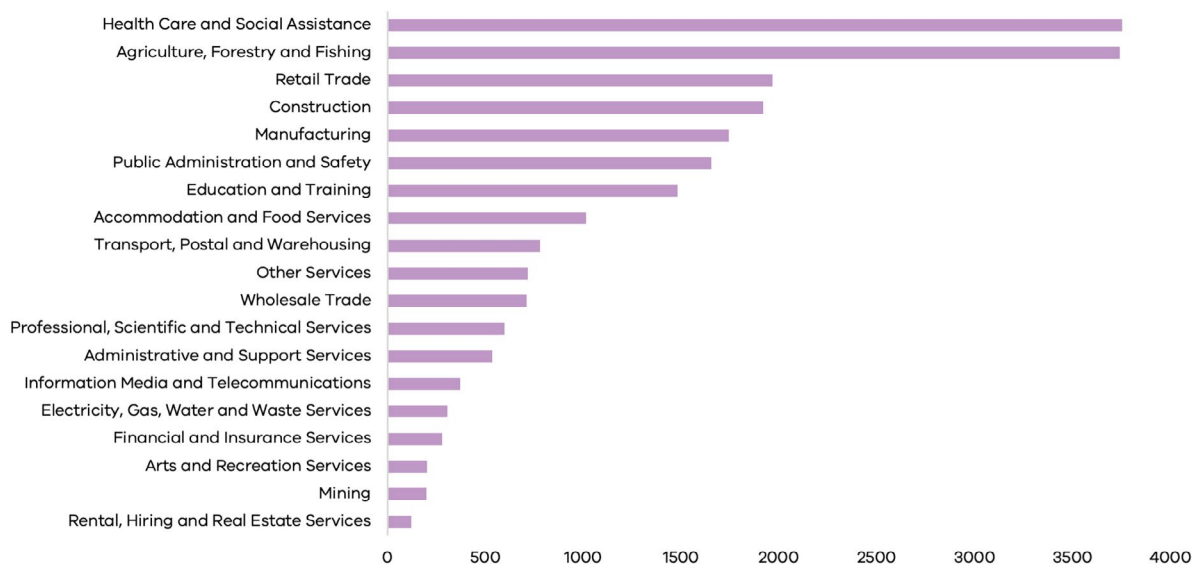
- For men and women, labour force participation is the second lowest among Regional Partnership regions however, regional unemployment has been low over the past decade.
- Labour productivity is low and declining but, for both men and women, the proportion of people working full-time (as opposed to part-time) exceeds regional averages.

Across the region, most local jobs tend to be filled by workers from within their local municipality.

Employment¹⁰

In 2020, there were 22,099 employed persons (see Figure 1.4.1) in Wimmera Southern Mallee. Health Care and Social Assistance (3,753 workers) was the largest employing sector, followed by Agriculture, Forestry and Fishing (3,743 workers) and Retail Trade (1,967 workers). The top seven employing industries account for approximately 74 per cent of the region's workforce. Analysing the results by gender, the largest employing industries for men are Agriculture, Construction, and Retail Trade. In comparison, the largest employing sectors for women are Health Care and Social Assistance, Education and Training, and Retail Trade.

¹⁰ Labour Market insights have used employment data by place of Usual Residence. Usual Residence refers to the area where a person usually lives regardless of where they were on Census night. This has been done to capture insights in the workforce who reside in the region. Journey to Work employment data has been used elsewhere in the supporting analysis and strategies as a measure of industry presence in a region. There will be small discrepancies between the two particularly in peri-urban regions where commuter patterns into Melbourne are higher.

Figure 1.4.1A: Employment by Industry

Source: (NIEIR, 2020)

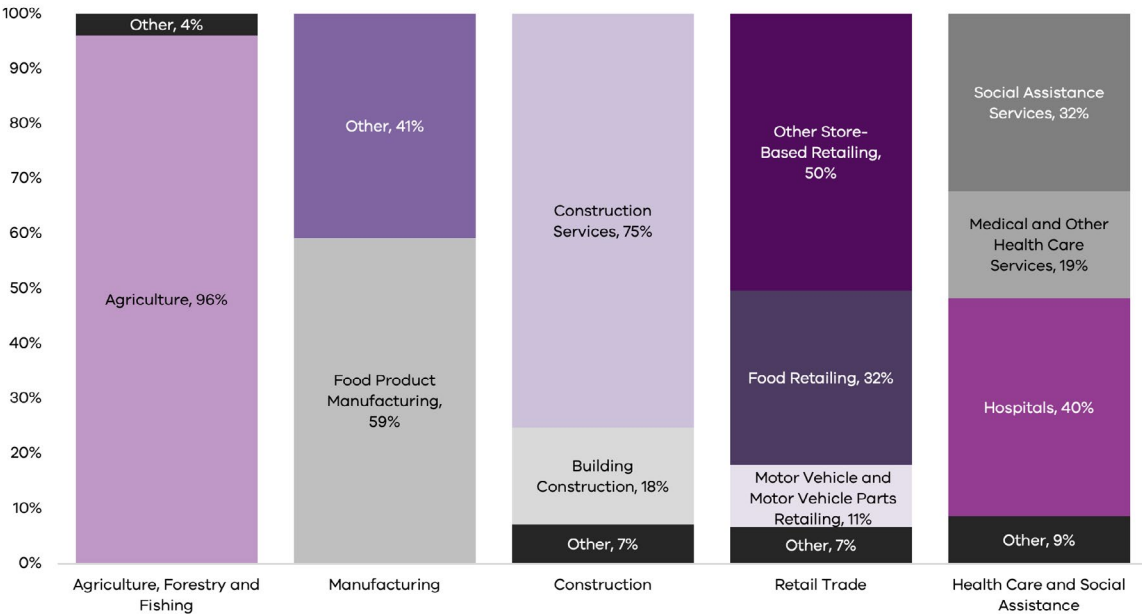
Table 1.4.1B: Wimmera Southern Mallee Employment by Industry and Gender

Industry	Male	Female
Agriculture, Forestry and Fishing	2743	866
Mining	179	21
Manufacturing	826	328
Electricity, Gas, Water and Waste Services	215	64
Construction	1230	133
Wholesale Trade	399	118
Retail Trade	839	1130
Accommodation and Food Services	447	750
Transport, Postal and Warehousing	687	139
Information Media and Telecommunications	74	72
Financial and Insurance Services	93	193
Rental, Hiring and Real Estate Services	65	75
Professional, Scientific and Technical Services	228	356
Administrative and Support Services	226	274
Public Administration and Safety	683	553
Education and Training	354	1140
Health Care and Social Assistance	634	2843
Arts and Recreation Services	136	139
Other Services	438	305

(ABS, 2016e)

Note: Gender breakdown uses 2016 data.

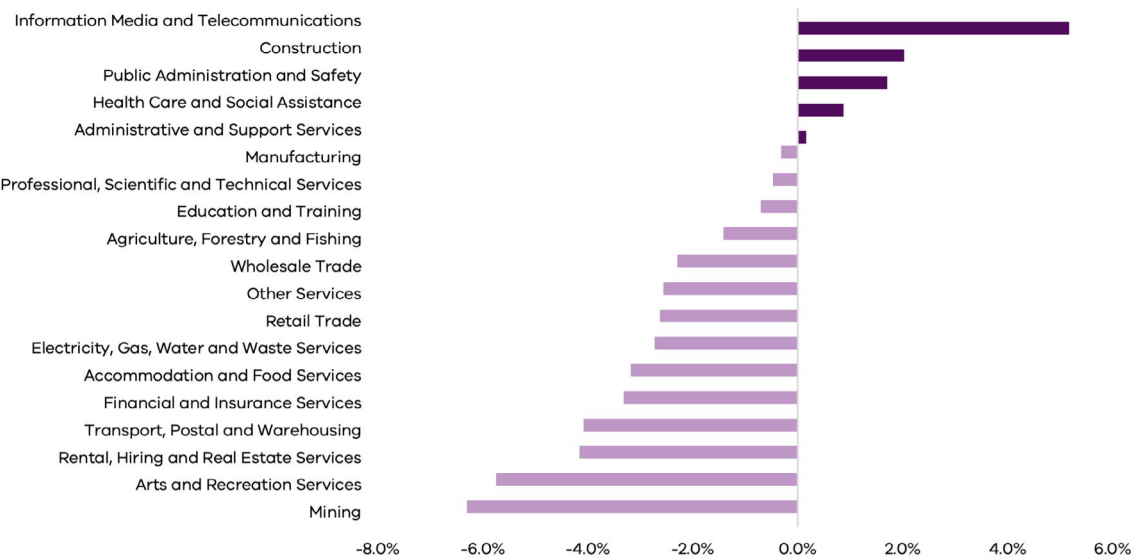
Figure 1.4.2: Subindustry Employment (Proportion of Top 5 Industries)



Source: (NIEIR, 2020)

Over the past ten years, employment has decreased by an average annual rate of 0.9. Employment growth is significantly lower than regional Victoria (1 per cent) and metropolitan Melbourne (2.1 per cent). Only five of 19 industries experienced an increase in the number of workers since 2011 (see Figure 1.4.3).

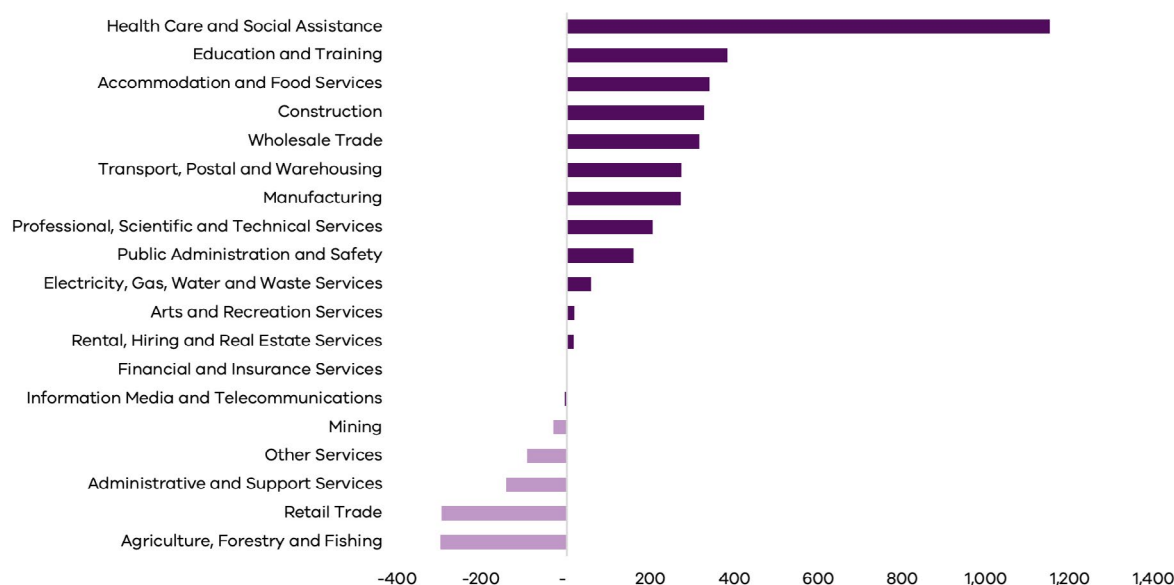
Figure 1.4.3: 10-year Average Annual Growth Rate (2011–2020)



Source: (NIEIR, 2020)

Pre-COVID projections (see Figure 1.4.4) forecast employment to increase by 3.8 per cent over the next five years. This growth had been predicted to be driven by employment in Health Care and Social Assistance and Education and Training. These two industries are the two most significant employing sectors for women in the region. The largest fall in employment was predicted to be realised in the Agriculture, Forestry and Fishing industry, the most significant employing sector for men. However, due to the significant disruptions caused by COVID-19, employment outcomes may now be significantly different from those expected, the impacts remain to be revealed.

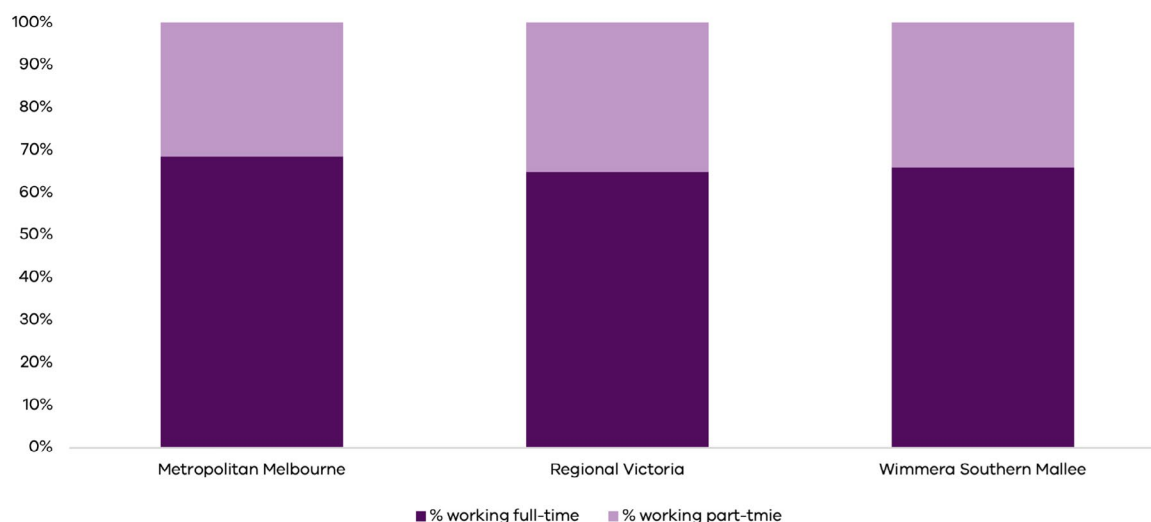
Figure 1.4.4: Projected change in employment, Victoria North West SA4, 2019–2024



Source: (National Skills Commission, 2020)

In the Wimmera Southern Mallee region, 34 per cent of the workforce work part time (see Figure 1.4.5). This proportion is lower than the average rate across regional Victoria (35 per cent) but is commensurate with metropolitan Melbourne (32 per cent). Females are far more likely to work part time than males (56 per cent to 21 per cent), which is a similar gap to that exhibited across regional Victoria (see Figure 1.4.6).

Figure 1.4.5: Composition of Employment (2020)



Source: (NIEIR, 2020)

Figure 1.4.6: Employment Type by Sex, 2016**Full Time / Part Time divide by gender**

	Regional Vic		Metro Melbourne		Wimmera Southern Mallee	
	Male	Female	Male	Female	Male	Female
Full Time	78%	43%	78%	51%	79%	44%
Part Time	22%	57%	22%	49%	21%	56%

(ABS, 2016e)

Note: for gender breakdown an older data source has been used (Census 2016), however the results should be broadly indicative of the current scenario.

Unemployment rate

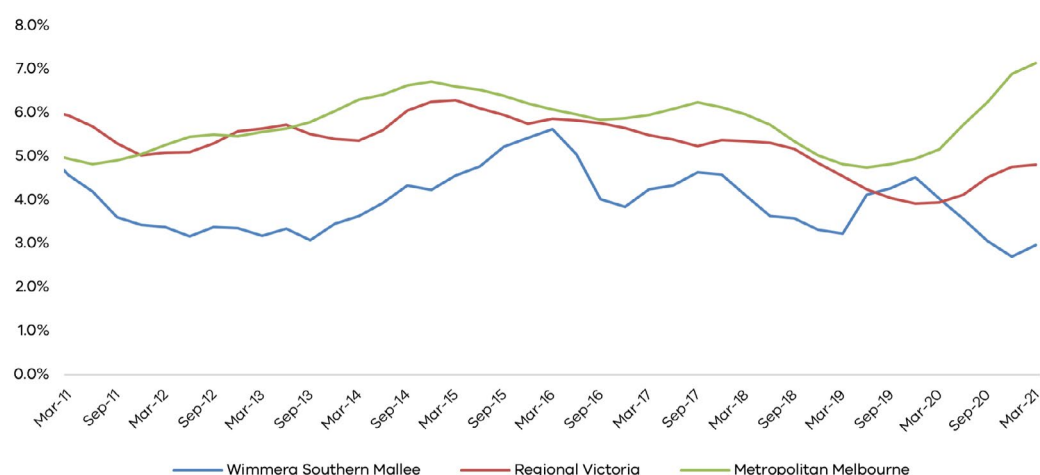
Over the past ten years, the unemployment rate in the Wimmera Southern Mallee has been considerably more volatile than that of regional Victoria and metropolitan Melbourne (see Figure 1.4.7). The region has consistently exhibited a lower unemployment rate than the average rate across the state.

Prior to the onset of the COVID pandemic (March 2020), the unemployment rate in the region was 4.0 per cent. This was on par with regional Victoria (3.9 per cent), however below metropolitan Melbourne (5.2 per cent).

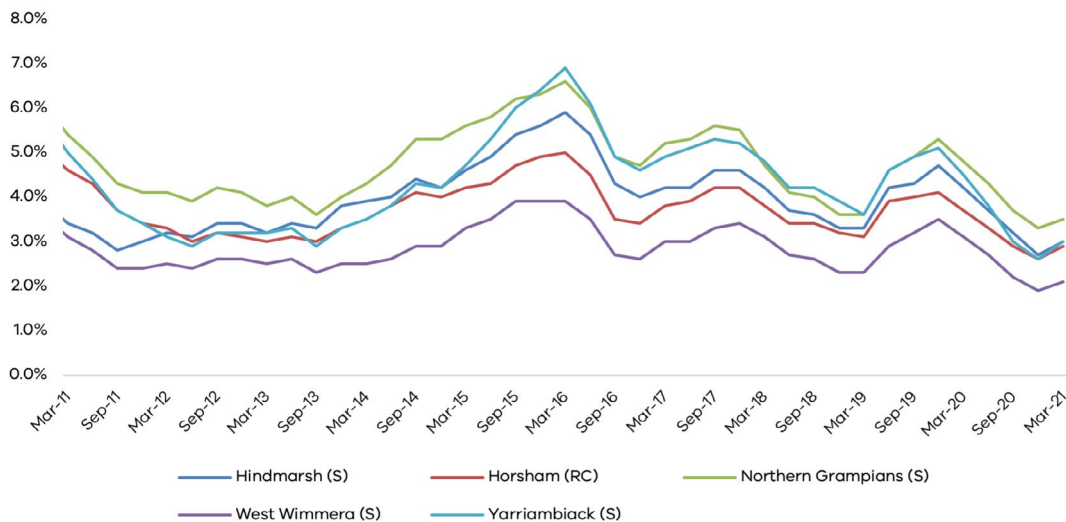
The region's long-term unemployment rate (December Qtr 2010 to March Qtr 2021) is 4.0 per cent; well below that of regional Victoria (5.3 per cent) and metropolitan Melbourne (5.8 per cent).

Unemployment rate estimates since COVID has seen the unemployment rate in the region decline to 3.0 per cent, well below the regional average.

The trends in unemployment over time have been relatively consistent across municipalities, as Northern Grampians maintained the region's highest level of unemployment and West Wimmera the lowest rates of unemployment.

Figure 1.4.7: Unemployment Rate (2011–2020)

Source: (National Skills Commission, 2021)

Figure 1.4.8: Unemployment Rate, LGA Comparison

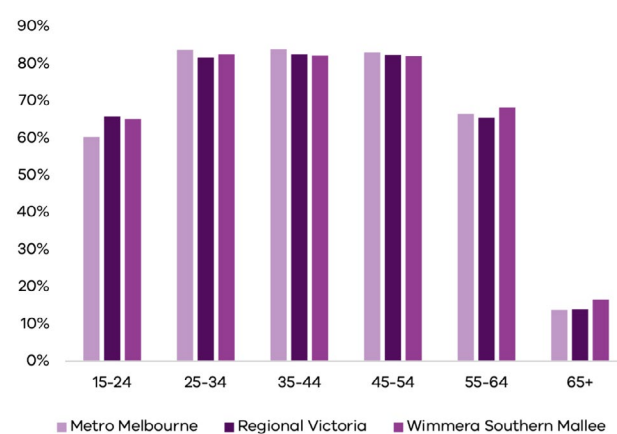
Source: (National Skills Commission, 2021)

Participation rate

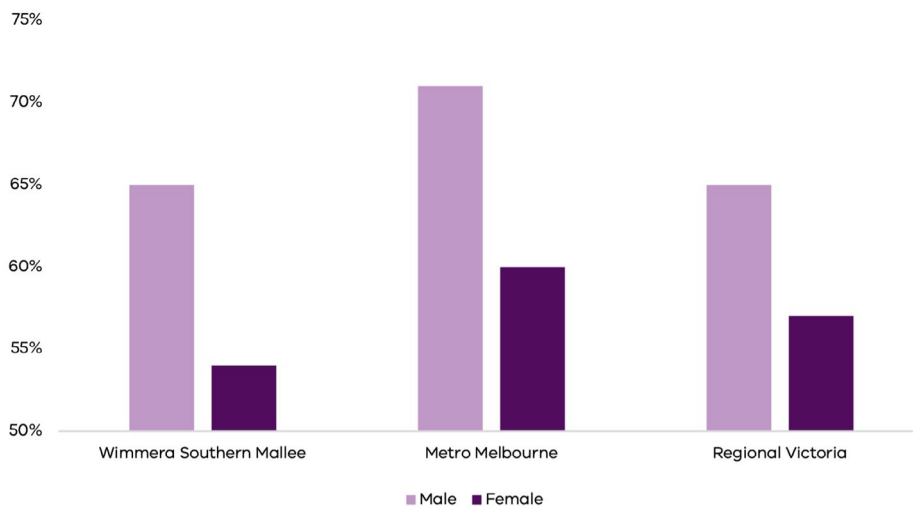
The labour force participation rate in the Wimmera Southern Mallee (59.4 per cent) is slightly lower than regional Victoria (60.9 per cent) and significantly lower than metropolitan Melbourne (65.8 per cent) (see Figure 1.4.9). The participation rate in the region underperforms regional averages across all age brackets under the age of 55, excluding the 25–34 years age group (see Figure 1.4.10).

Figure 1.4.9: Participation Rate (2016)

Source: (ABS Census, 2016)

Figure 1.4.10: Participation Rate Age Comparison

Consistent with the pattern across the state, the female participation rate in the Wimmera Southern Mallee region (54.4 per cent) is significantly lower than the male participation rate (64.7 per cent) (see Figure 1.4.11). This disparity presents an opportunity to boost future economic growth in the region. Supporting women into jobs in growth sectors and ensuring access to quality and affordable childcare are options for boosting female participation.

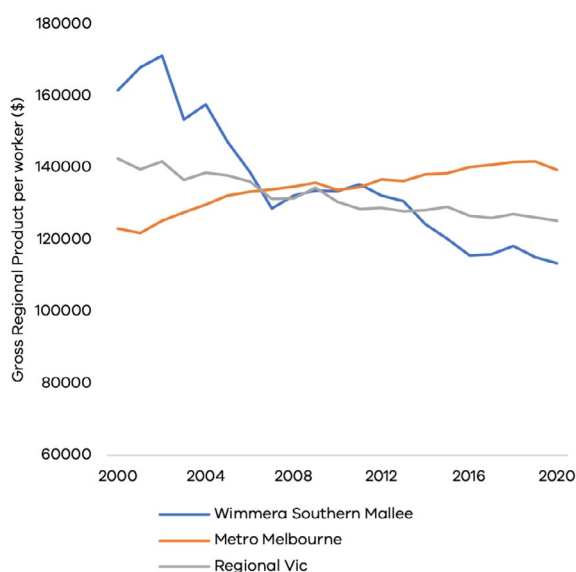
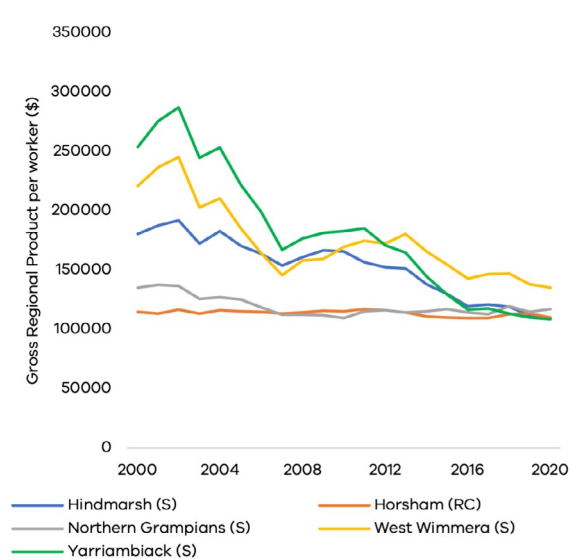
Figure 1.4.11: Participation Rate by Gender (2016)

Source: (ABS Census, 2016)

Labour Productivity (Gross Regional Product (GRP) per worker)

Since 2002, Wimmera Southern Mallee's labour productivity has significantly declined. While the trend is consistent with that of regional Victoria, the region's decline has been more pronounced (see Figure 1.4.12). The region experienced a substantial fall in productivity between 2002 and 2007, which was likely driven by the impact of the millennium drought on the Agriculture sector. Furthermore, as water restrictions became more severe, access to water impacted the Tourism and Manufacturing sectors.

Across LGAs, there are notable differences in labour productivity changes over time. GRP per worker has converged as a result of large declines in West Wimmera, Yarriambiack and Hindmarsh, while Northern Grampians and Horsham have been relatively stable (see Figure 1.4.13).

Figure 1.4.12: Regional Productivity**Figure 1.4.13: LGA Productivity**

(NIEIR, 2020)

Worker mobility and commuting across regions

An analysis of journey-to-work patterns between LGAs indicates that municipalities within Wimmera Southern Mallee are largely self-sufficient. Due to the distance between town centres and proximity of towns to other local government areas, there is little commuting between LGAs for work (see Table 1.4.14). The minor exception is a small group of people from Hindmarsh and Yarriambiack who commute to Horsham for work (see Table 1.4.15).

All municipal labour forces in Wimmera Southern Mallee are highly self-contained i.e. locals working where they live, and highly self-sufficient i.e. local jobs filled by the resident labour force. Among LGAs, Northern Grampians has the largest proportion of residents commuting outside of Wimmera Southern Mallee for work, with the majority of those commuting to neighbouring Ararat.

While relatively minor, a number of Wimmera Southern Mallee residents also commute into South Australia for work towns including Naracoorte, Tatiara and Wattle Range.

Table 1.4.14: Labour mobility

	Hindmarsh (S)	Horsham (RC)	Northern Grampians (S)	West Wimmera (S)	Yarriambiack (S)
Total local workers (working anywhere) (UR)	2,301	9,110	4,855	1,864	2,629
Number of jobs in local area (POW)	2,171	8,872	4,750	1,676	2,556
Number of local jobs held by locals	1,826	8,077	3,964	1,413	2,086
Number of locals employed outside LGA	475	1,033	891	451	543
Employment Self containment	82%	92%	85%	79%	82%
Employment Self Sufficiency	84%	91%	84%	84%	82%

Source ABS, Census 2016

Table 1.4.15: Labour mobility across LGAs

Place of work → Place of residence ↓	Hindmarsh (S)	Horsham (RC)	Northern Grampians (S)	West Wimmera (S)	Yarriambiack (S)	Outside WSM
Hindmarsh (S)	1,826	209	0	67	65	67
Horsham (RC)	128	8,077	68	56	226	244
Northern Grampians (S)	0	82	3,964	0	37	606
West Wimmera (S)	109	62	3	1,413	4	205
Yarriambiack (S)	55	238	25	0	2,086	134
Outside WSM	53	204	686	140	135	

Source: (ABS Census, 2016)

Note: The Employment Self-Containment describes the percentage of employed residents who are employed within the boundaries of the LGA. The Employment Self-Sufficiency describes the percentage of local jobs that are filled by local residents for an LGA. Highlighted cells represent workers living and working within the same LGA.

1.5 Skills

Wimmera Southern Mallee's subdued growth in employment in skilled occupations is expected to put further pressures on the region's levels of disadvantage.

- While the region has a higher than regional average proportion of workers in skilled occupations, the region's growth trend lags behind metropolitan Melbourne which saw the employment in skilled occupations significantly increase between 2011 and 2016.

Occupation skills levels are closely associated with measures of disadvantage such as educational attainment and income levels. Leveraging opportunities to enhance skill levels will enable the local community to address pockets of disadvantage and therefore enable equitable improvements in local economic growth and employment outcomes.

Occupation

In 2021, approximately 15,600 workers in Wimmera Southern Mallee worked in skilled occupations (65.0 per cent of the local workforce). As a proportion of the total workforce, the region has a higher share of skilled workers relative to regional Victoria (62.2 per cent), but lags behind metropolitan Melbourne (67.3 per cent) averages. The remainder of the workforce in low skilled occupations is 8,400 workers.

In the five years to 2021, the number of skilled workers increased by approximately 150 workers (0.9 per cent), while the number of low skilled workers decreased by approximately 1,100 workers (11.6 per cent). The rising number of skilled workers is consistent with, but much lower than, trends across regional Victoria and metropolitan Melbourne, where employment among skilled workers grew by 8.8 per cent and 22.1 per cent respectively.

Mixed Crop and Livestock Farmers was the largest employing occupation in the Wimmera Southern Mallee, followed by Crop Farmers and Sale Assistants. In the five years to 2019, six of the top ten employing occupations experienced a decline in total number of workers. Six of the top ten employing industries were skilled occupations, half of which experienced a decline in total workers.

Table 1.5.1: Top 10 employing occupations

Wimmera Southern Mallee	2021	2016	Change	Skill level* ¹¹
Mixed Crop and Livestock Farmers	1700	1800	-100	Skilled
Crop Farmers	1500	1600	-100	Skilled
Sales Assistants (General)	1200	1200	0	Low Skilled
Livestock Farmers	1000	1100	-100	Skilled
Registered Nurses	1000	900	100	Skilled
Retail Managers	700	600	100	Low Skilled
Secondary School Teachers	600	400	200	Skilled
Primary School Teachers	500	400	100	Skilled
Aged and Disabled Carers	500	700	-200	Low Skilled
Truck Drivers	500	500	0	Low Skilled

(Department of Education and Training, 2021) * skill level is defined as a function of the range and complexity of the set of tasks performed in a particular occupation. The greater the range and complexity of the set of tasks, the greater the skill level of an occupation. Skilled workers are defined as being classed between an ANZSCO Skill level of 1-3, while low skilled is classed as 4 or 5.

11. The concept of skill level. In ANZSCO, skill level is defined as a function of the range and complexity of the set of tasks performed in a particular occupation. The greater the range and complexity of the set of tasks, the greater the skill level of an occupation. Skill level is measured operationally by the level or amount of formal education and training; the amount of previous experience in a related occupation, and the amount of on-the-job training required to competently perform the set of tasks required for that occupation.



02 Comparative Advantage

The historical economic performance of a region serves as a good indicator of the industries which have a comparative advantage.

LQ analysis provides useful insights into the region's employment specialisation and business clustering. While insightful, they are only partial measures for understanding regional economies and comparative advantage. Comparative advantages can shift as a result of changes in government policies, new trade agreements and changes in the global economy, such as changing consumption patterns or increasing trade barriers. This analysis should therefore be considered alongside qualitative evaluations to help identify sectors with untapped and growing potential and support those industries to acquire a comparative advantage in the future.

Nonetheless, the analysis in this report provides a consistent picture of the region's revealed comparative advantage. As indicated by levels of employment and GVA specialisation in Agriculture, Forestry and Fishing alongside Health Care and Social Assistance, Mining, Other Services and Electricity, Gas, Water and Waste Services industries. This suggesting the region has some local factors which may contribute to further economic opportunities.

The drivers behind the comparative advantages of the region are varied and will include local infrastructure, natural resources and proximity to inputs or key markets. A point in time snapshot undertaken by Infrastructure Victoria in 2019 (Wimmera Southern Mallee, Industry profile, 2019), and built upon by a number of other government analysis found the region has considerable strengths across a range of attributes:

2.1 Transport Infrastructure

Located in the West – North West part of the state, Wimmera Southern Mallee is a relatively remote region of Victoria. The landlocked region is reliant on the road and rail connections for trade routes which are important for local agriculture and manufacturing sectors. These networks provide access to Melbourne, Adelaide and Portland and their key ports, airports and economic centres. There is a high degree of interstate connectivity, particularly in the west of the region as it shares the border with South Australia (see Figure 2.2.1)

A regional profile of Wimmera Southern Mallee completed in 2019 for Infrastructure Victoria identified that key transport infrastructure is centred around the road network, including:

- the Western Highway, connecting Melbourne to Adelaide via Stawell and Horsham;
- road connections to the south of Victoria via the Henty highway which connects Lascelles to Portland via Horsham;
- the Wimmera Highway, connecting Edenhope to Bendigo via Horsham and St Arnaud; and
- the Sunraysia highway connects Ouyen to Ballarat, cutting through the north east of the region.

The rail network includes direct freight rail routes from Yaapet and Hopetoun which connects the region to ports in Geelong, Portland and Melbourne. The region also has an interstate freight line which connects Adelaide to Geelong and onto Melbourne. There are limited passenger rail connections to Melbourne and Adelaide via the overland service passing through Nhill, Dimboola and Stawell.

The region does not have a major airport however it does have a number of smaller regional airports (Infrastructure Victoria, 2019).

Figure 2.2.1: Transport Connections, Wimmera Southern Mallee



Source: (Infrastructure Victoria, 2019)

2.2 Digital Infrastructure¹²

There are significant discrepancies in the levels of digital inclusion between regional areas and metropolitan areas. The Australian Digital Inclusion Index (ADII) is a composite index used to measure digital inclusion across three dimensions of Access, Affordability and Digital Ability. In 2021, All LGAs in the region scored below the state average (71.0) on the index, with Yarriambiack scoring lowest, while Horsham scored highest.

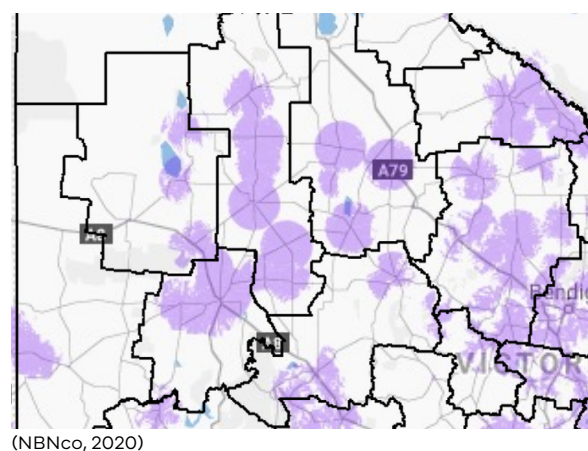
Table 2.2.1: ADII score comparison 2021, VIC

Local Government Area	Score
Hindmarsh	62.0
Horsham	65.0
Northern Grampians	63.0
West Wimmera	62.0
Yarriambiack	61.0
Vic Average	71.0

(Thomas, 2021)

Within population centres, mobile coverage appears to be adequate based on public coverage maps, however regional stakeholders often report the lived experience differs from what public coverage maps suggest. Mobile coverage quality also tends to be less reliable outside of regional population centres. The NBN Co rollout map (as at September 2020) indicates areas served by NBN Co fixed-line and fixed wireless services (purple) and those served by lower quality NBN Co Satellite services (white areas). The higher-quality fixed-line services (like FTTN and FTTP) are largely limited to town centres, with lower quality fixed wireless services serving the more sparsely populated surrounding areas (See Figure 2.2.2). In addition, coverage should not be taken to indicate connection quality.

Figure 2.2.2: NBN Rollout Map, Wimmera Southern Mallee



2021 Connecting Victoria roundtable discussions identified a number of key digital issues for the region;

- Increased need for better connectivity to address equity and digital inclusion. Which in turn would support remote work, learning and tele health.
- Need for connectivity for businesses which are struggling with limited connectivity, and for tourism locations which face significant gaps in connectivity.
- A need to address the connectivity gap in the most remote areas through alternative mechanisms.
- A need to address digital literacy to maximise benefit from infrastructure investment.

¹² Fixed Broadband access terminology includes National Broadband Network (NBN) fixed-line broadband services including Fibre to the Premises (FTTP), Fibre to the Node (FTTN), Fibre to the Curb (FTTC), Fixed Wireless and Satellite service. Digital mobile networks capable of supporting voice telephony and data applications such as through 4G networks, with emerging Internet of Things capability.

The Wimmera Southern Mallee Digital Plan found that all tourist attractions assessed had issues with fixed access broadband services. Tourist spots have variable mobile coverage, with national parks and lakes underserved (RDV, 2019).

The Victorian Government's \$550 million Connecting Victoria program is designed to give more Victorians across the state access to business-grade broadband and high-quality mobile services. This includes improving 4G mobile coverage, helping more places become 5G ready, and improving public safety during emergencies through more resilient and accessible services.

The program will enable more businesses to take advantage of digital opportunities with more reliable, better value broadband in more places, including popular shopping streets and business parks.

The quality of digital infrastructure across the region is highly variable. General information about the pattern of digital infrastructure availability across regional locations is summarised in table 2.2.3 below.

Table 2.2.3: General findings for the supply of digital infrastructure in regional Victoria

	Fixed broadband access	Mobile access
Cities and large towns, such as Horsham and Stawell	Generally comparable to metropolitan Melbourne with some access to FTTN and widespread provision of FTTN within town centres, but fixed wireless and satellite serving the town fringe and beyond	Generally comparable to metropolitan Melbourne with multiple carriers operating 4G networks, but quality and reliability of access can fade beyond town centre
Small towns and localities, such as Murtoa and Rainbow	Generally provisioned with fixed wireless services in the town centre with the fringe and surrounding areas receiving satellite. Some small towns receive higher-speed FTTN or FTTC services	Less capacity and reliability than in larger towns. Better quality within the town centre than when moving into surrounding areas and between towns
Primary production areas, such as cropping northeast of Nhill	Lower capacity fixed broadband technologies like fixed wireless and satellite available due to remoteness of these farms / businesses. Fixed wireless more available closer to population centres	Variable service quality across primary production areas. Better when closer to population centres and unimpeded by local topography
Tourist locations, such as Grampians National Park	Most relevant to tourist operators and businesses. Higher capacity technologies like FTTN available to operators in town centres, but lower capacity services like fixed wireless and satellite in more remote tourist locations	Often weak coverage in remote locations such as trail walks and national parks and network limitations in accommodating large influxes of visitors such as periodic events
Transport corridors, such as major highways and rail lines	N/A	Stronger and more reliable coverage on large highways and rail lines out to Horsham, with service quality and reliability compromised on smaller roads and in more remote areas

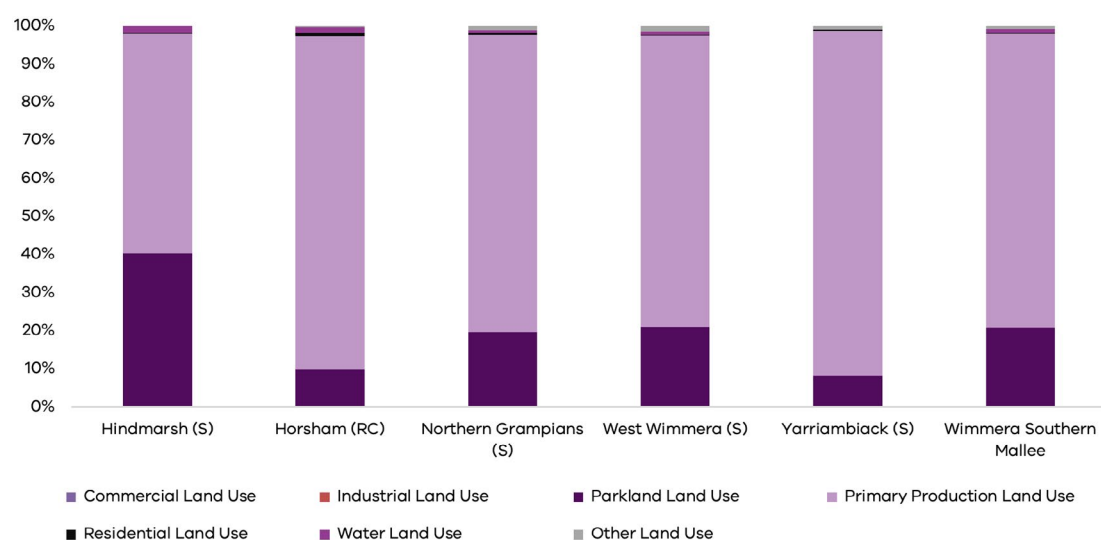
(Infrastructure Victoria, 2019)

2.3 Natural Endowments

Figures 2.3.1 and 2.3.2 indicate the land use in the Wimmera Southern Mallee and its constituent LGAs. The Wimmera Southern Mallee region has mountains, plains, deserts and wetlands. The region hosts large sections of public land and national parks, alongside a significant proportion of land which has been cleared and is used as productive agricultural land. The vast majority of land (77 per cent) is used for primary production purposes. Most of the remaining land is in various parks and public land (21 percent) and a mix of water, residential or other uses.

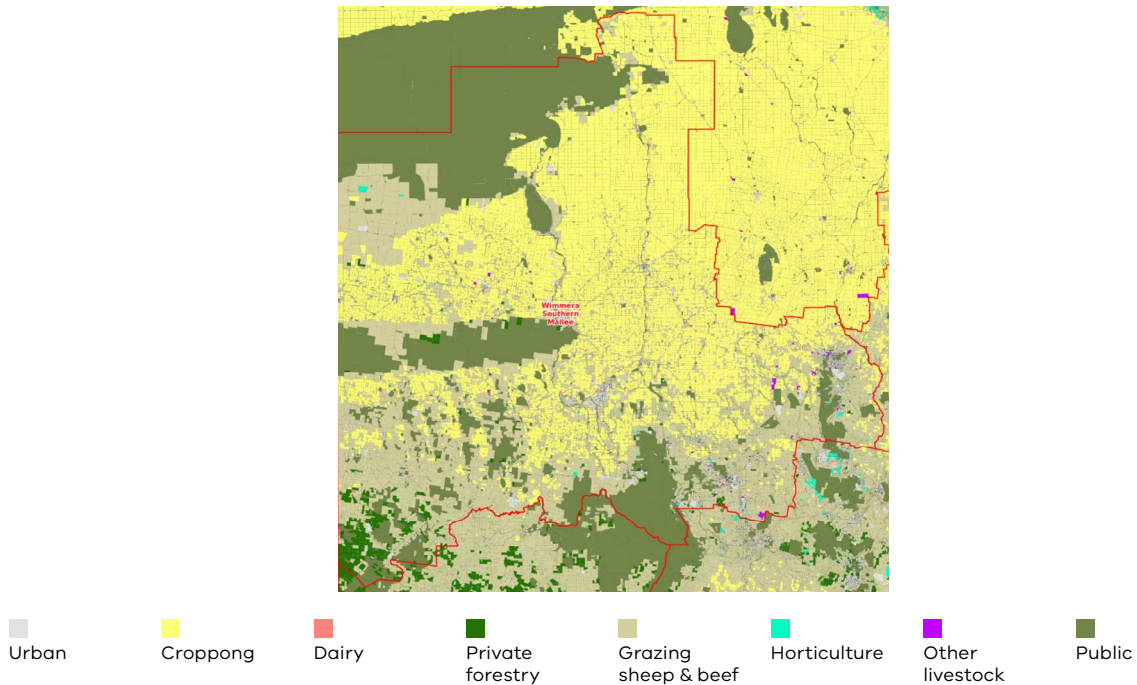
Primary production land use mainly consists of broad acre cropping of cereals, pulses and oilseeds across the central regions and north east. These cropping zones are bordered by livestock grazing, particularly in the south, as well as mixed farming (Infrastructure Victoria, 2019).

Figure 2.3.1: Land Use by LGA, Wimmera Southern Mallee



Source: (ABS, 2017)

Figure 2.3.2: Spatial Map of Land Use



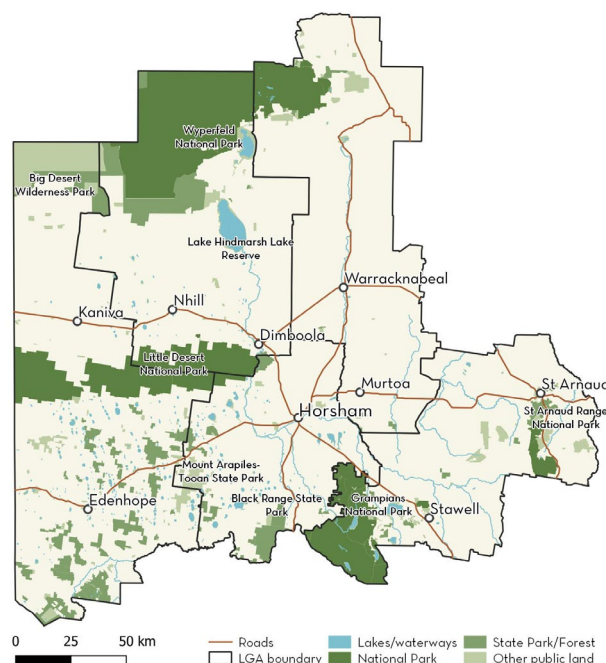
(Agriculture Victoria , 2020)

Environmental Assets

The Wimmera Southern Mallee region has a diverse range of environmental assets, including plains, mountains, wetlands, deserts, forests, and woodlands (summarised in Table 2.2.3 and displayed in Figure 2.2.4). Assets with high environmental value are principally found in public land reserves, and often isolated from each other by large cleared areas. In addition to providing important ecosystem services, these environmental areas are valuable recreational, commercial and tourism resources offering opportunities for economic development (Infrastructure Victoria, 2019).

Table 2.2.3: Key Environmental Assets, Wimmera Southern Mallee

National Parks	State Forest and State Parks	Other
<ul style="list-style-type: none">• Grampians (Gariwerd) National Park• Wyperfeld National Park• Little Desert National Park• St Arnaud Range National Park (also known as Kara Kara National Park).	<ul style="list-style-type: none">• Mount Arapiles-Tooan State Park• Black Range State Park.	<ul style="list-style-type: none">• Mount Arapiles• Big Desert Wilderness Park Pyrenees Range.

Figure 2.2.4: Key Environmental Assets, Wimmera Southern Mallee

Source: (Infrastructure Victoria, 2019)

Mineral resources and forestry

Wimmera Southern Mallee has a history of gold mining, particularly around Stawell. The region also contains around three quarters of Victoria's mineral sands deposits by area, concentrated in the western and northern parts of the region. There are also several quarries which produce limestone, sand and gypsum (Infrastructure Victoria, 2019). Despite its significant amount of state forest, the region hosts no substantial harvestable timber.

Renewable energy

To date, renewable energy generation in the Wimmera Southern Mallee has been focused on wind power. The region has a number of wind farms which connect to power local grids and export out of the region (Grampians New Energy Taskforce, 2019). As at 2020 these include operational farms at Kiata (31MW), Yawong (7.2MW) and Murra Warra (429MW capacity once complete, stage one construction already completed providing 226MW) and a number under construction or in permit application stages (DELWP, 2020).

There is considerable solar energy generation potential with the region (1400 to 1700 kWh/kWp per year), particularly in the north of the region (Global Solar Atlas, 2020). The Grampians Regional Roadmap to Net Zero emissions identifies a progressive expansion of solar as important in its energy mix.

While there is opportunity to generate significant amounts of solar and wind power in the region, the roadmap identifies the limitations of the transmission infrastructure and current storage capabilities. The roadmap therefore recommends local authorities work with state and federal government to upgrade the existing power grid, such as is happening with the planned Western Victoria Transmission Network Project between Bulgana (north of Ararat) and Sydenham (Melbourne), this comprises of a new 220kV transmission line between Bulgana and Ballarat and a new 500kV transmission line to Sydenham (DEWLP, 2020).

03 Bibliography

- ABS. (2011). Index of Relative Socio-economic Disadvantage (IRSD). Accessed from ABS.Stat.
- ABS. (2016a). Counting Persons, Place of Residence – Cultural and Language Diversity & Disability, Need for Assistance and Carers. Retrieved from Accessed from Census TableBuilder
- ABS. (2016b). Counting Families, Place of Enumeration — Household Income. Accessed from Census TableBuilder.
- ABS. (2016c). Counting Person, Place of Usual Residence — Education and Qualifications. Accessed from Census TableBuilder.
- ABS. (2016d). Index of Relative Socio-economic Disadvantage (IRSD) LGA Rankings. Accessed from ABS.Stat.
- ABS. (2016e). Counting Persons, Place of Usual Residence — Cultural and Language Diversity. Accessed from ABS Census Table builder. Retrieved from Accessed from ABS Census TableBuilder
- ABS. (2017). ABS Cat 1270.0.55.003. Australian Statistical Geography Standard (ASGS).
- ABS. (2020, July). 3235.0 - Regional Population by Age and Sex, Australia, 2018. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/mf/3235.0>
- ABS. (2020). 8165.0 Counts of Australian Businesses, including Entries and Exits, June 2015 to June 2019.
- ABS. (2020a, July). 3412.0 - Migration, Australia, 2018-19 . Retrieved from
► <https://www.abs.gov.au/ausstats/abs@.nsf/mf/3412.0>
- ABS. (2020b, July). 3235.0 - Regional Population by Age and Sex, Australia, 2020. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/mf/3235.0>
- ABS. (2020b). Net internal and overseas migration estimates by region (SA2 and above) and age, 2016–17 onwards. Retrieved from Australian Bureau of Statistics:
► http://stat.data.abs.gov.au/Index.aspx?DataSetCode=ABS_REGIONAL_MIGRATION
- ABS. (2020c, July). 3235.0 — Regional Population by Age and Sex, Australia. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/mf/3235.0>
- ABS. (2021, March). Regional Population, Australia, 2019-20. Retrieved from
► <https://www.abs.gov.au/statistics/people/population/regional-population/2019-20>
- ABS. (2021a, March). Regional Population, Australia, 2019-20. Retrieved from
► <https://www.abs.gov.au/statistics/people/population/regional-population/2019-20>
- ABS. (2021b). Net internal and overseas migration estimates by region (SA2 and above) and age, 2016-17 onwards. Retrieved from Australian Bureau of Statistics:
► http://stat.data.abs.gov.au/Index.aspx?DataSetCode=ABS_REGIONAL_MIGRATION
- ABS Census. (2011). Accessed from ABS census table builder.
- Agriculture Victoria . (2020, August 11). Agriculture Victoria Interactive Resource Map. Retrieved from
► <https://invest.agriculture.vic.gov.au/#/map?lat=142.99825372181672&lon=-37.95643001755872&z=8.292983047733884&bm=bm0&l=ag01:n:100,mb0:y:100,fp3:n:100,mb2:n:100,mb21597202064474:y:100>
- Agriculture Victoria. (2018a). Regional Overview - Wimmera Southern Mallee. Melbourne: Department of Jobs, Precincts and Regions.
- Agriculture Victoria. (2018b). Major Industries Overview — Grains. Melbourne: Department of Jobs, Precincts and Regions.
- Agriculture Victoria. (2018c). Major Industries Overview — Beef and Sheep. Melbourne: Department of Jobs, Precincts and Regions.

Agriculture Victoria. (2018d). Major Industries Overview - Wool. Melbourne: Department of Jobs, Precincts and Regions.

Australian Bureau of Statistics (ABS). (2020a, July). Estimated Regional Population By LGA (2001-2020). Retrieved from

► https://stat.data.abs.gov.au/Index.aspx?DataSetCode=ABS_ANNUAL_ERP_LGA2020

Australian Bureau of Statistics. (2020, July). 3218.0 - Regional Population Growth, Australia, 2018-19. Retrieved from

► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/3218.0Main+Features12018-19?OpenDocument>

DELWP. (2020). Wind Energy Projects. Retrieved from

► www.planning.vic.gov.au:

► https://www.planning.vic.gov.au/permits-and-applications/specific-permit-topics/wind-energy-facilities/wind-energy-projects-planning?_ga=2.111227270.301573943.1599630060-287864187.1597208058

Department of Education and Training. (2021).

Department of Environment, Land, Water and Planning (DELWP). (2019). Victoria in Future - Population Projections. Melbourne, Australia.

DEWLP. (2019). Victoria in Future. Melbourne, Australia .

DEWLP. (2020).

► www.planning.vic.gov.au. Retrieved from

► <https://www.planning.vic.gov.au/environment-assessment/browse-projects/projects/western-victoria-transmission-network-project>

Energy Australia. (2020). Ballarat Battery Storage. Retrieved from EnergyAustralia.com.au:

► <https://www.energyaustralia.com.au/about-us/energy-generation/ballarat-battery-storage>

First Peoples State Relations. (June 2021, June).

Geelong Port. (2020, August 11). Home Page. Retrieved from

► <https://geelongport.com.au>

Global Solar Atlas. (2020). map. Retrieved from Global Solar Atlas:

► <https://globalsolaratlas.info/map?c=-37.628372,143.522644,9&r=AUS&s=-37.300275,143.926392&m=site>

Grampians New Energy Taskforce. (2019). Grampians Regional ROADMAP TO NET ZERO EMISSIONS. Melbourne: DELWP.

Infrastructure Victoria. (2019, March). Wimmera Southern Mallee Regional Profile. Retrieved from

► www.infrastructurevictoria.com.au:

► <https://www.infrastructurevictoria.com.au/wp-content/uploads/2019/04/Aither-Wimmera-Southern-Mallee-Regional-Profile-March-2019.pdf>

MariTrade. (2020, June). Sea and Air Freight Trade Volumes By Destination.

National Skills Commission. (2020). Labour Market Information Portal. Retrieved from

► <https://lmip.gov.au/default.aspx?LMIP/EmploymentProjections>

National Skills Commission. (2021). Retrieved from

► <https://lmip.gov.au/default.aspx?LMIP/Downloads/SmallAreaLabourMarketsSALM>

NBNco. (2020, September). NBNco rollout map. Retrieved from nbnco.com.au:

► <https://www.nbnco.com.au/learn/rollout-map>

NIEIR. (2020, July). International Exports - LGA Annual Victoria Annual (2019). Retrieved from

► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/3218.0Main+Features12018-19?OpenDocument>

NIEIR. (2020). National Institute of Economic and Industry Research Estimates.

Port of Melbourne. (2020, August 11). Trade Performance. Retrieved from

► www.portofmelbourne.com

► <https://www.portofmelbourne.com/about-us/trade-statistics/trade-performance/#:~:text=Total%20trade%20through%20the%20Port,to%2041.3%20million%20revenue%20tonnes>.

Port of Portland. (2020, August 11). Home page. Retrieved from
► <https://www.portofportland.com.au>

RDV. (2019). Regional Digital Plan— Wimmera Southern Mallee. Melbourne.

REMPAN. (2021). Business Entries, September 2015 to September 2020 — Wimmera Southern Mallee. REMPLAN Business Analysis Module.

REMPAN. (2021). Business Location Data. Retrieved from
► <https://www.rempplan.com.au/>

Thomas, J. B.-J. (2021). Australian Digital Inclusion Index. Melbourne: RMIT, Swinburne University of Technology and Telstra. Retrieved from
► www.digitalinclusionindex.org.au

Tourism Research Australia. (2020, July). Expenditure, Visitors and Visitor Nights by Victoria's Partnership Regions: 2015-2020. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/3218.0Main+Features12018-19?OpenDocument>

Tourism Research Australia. (2020, September). Local Government Area Profiles 2019. Retrieved from
► <https://www.tra.gov.au/Regional/local-government-area-profiles>

Tourism Research Australia. (2021, July). Expenditure, Visitors and Visitor Nights by Victoria's Partnership Regions: 2015-2020. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/3218.0Main+Features12018-19?OpenDocument>

Tourism Research Australia. (2021a, July). Expenditure, Visitors and Visitor Nights by Victoria's Partnership Regions: 2015-2020. Retrieved from
► <https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/3218.0Main+Features12018-19?OpenDocument>



04 Strategic context

Wimmera Southern Mallee Regional Economic Development Strategy

The following table describes the local strategies, plans and frameworks that shaped the Wimmera Southern Mallee REDS, including to define an economic narrative for the region and ensure the strategic directions in the REDS are aligned with local priorities.

Table 4.1.1: Strategic context

Wimmera Southern Mallee Regional Growth Strategic Plan 2012, DELWP	
Purpose	This regional growth plan provides a regional approach to land use planning in the Wimmera Southern Mallee and identifies opportunities for encouraging and accommodating growth and managing change over the next 30 years.
Identified priorities	<p>The plan includes reference to following principles to achieve 2041 vision:</p> <ul style="list-style-type: none"> • Diversification of the economy, diversifying the value-add processing of agricultural commodities • Agriculture: protect resources, maintain productivity, support industry development, strengthening the farming sector's capacity to prosper in a changing climate • Identify infrastructure needed to support growth • Use of region's assets to facilitate diversification and ensure resilient community • Facilitation and promotion of industrial cluster • Development and enhancement of nature-based tourism • Opportunities for growth should be identified to facilitate appropriate local development • Provision of better access to education, training and attracting and retaining of workers.
Influence on the REDS strategic directions	✓ Agriculture and manufacturing
	✓ Visitor Economy (natural assets and Aboriginal heritage)
	Growing sector (health and social services)
	✓ Natural Resources (Renewable energy)
Wimmera Southern Mallee Investment Plan 2015	
Purpose	The plan identifies the immediate focus for the Wimmera Southern Mallee community including jobs, investment, exports and opportunities and list priority project that are contributing to the focus areas.
Identified priorities	<p>The priority projects are categorised into the followings:</p> <ul style="list-style-type: none"> • Critical infrastructure projects (Mobile phone coverage, rail freight upgrade and major roads upgrades) • Advocacy projects (mining development and exploration, renewable energy, passenger rail services, housing for jobs, education, training and NBN).
Influence on the REDS strategic directions	Agriculture and manufacturing
	Visitor Economy (natural assets and Aboriginal heritage)
	Growing sector (health and social services)
	✓ Natural Resources (Renewable energy)

Wimmera Southern Mallee Regional Partnership Outcomes Roadmap 2019

Purpose The roadmap outlines the challenges the region faces in achieving long term social, economic, environmental and cultural outcomes and the actions the region is taking to improve these outcomes across the region.

Identified priorities The priorities are:

- Economic diversification (a vibrant economy with a thriving, innovative agriculture industry and emerging tourism opportunities)
- Telecommunications
- Connectivity — public transport and roads
- Strong local government
- Social services delivery (health, education, youth disadvantage, family violence, early years).

Influence on the REDS strategic directions

- ✓ **Agriculture and manufacturing**
- ✓ **Visitor Economy (natural assets and Aboriginal heritage)**
- ✓ **Growing sector (health and social services)**
- Natural Resources (Renewable energy)**

Regional Digital Plan

Purpose The Digital Plan aims to identify 'unmet needs' and potential solutions, for both the present and in 3-5 years and empowers advocacy and action to reduce the digital divide and inequality.

Identified priorities The identified priorities are:

- Addressing remaining mobile blackspots in agricultural areas, tourist locations and on the region's roads is the foremost priority.
- Addressing unmet Significant fixed access 'unmet demand' is prevalent across the region for businesses, and for households in smaller towns and primary production areas.
- Internet of Things Access
- Digital skills and affordability

Influence on the REDS strategic directions

- ✓ **Agriculture and manufacturing**
- ✓ **Visitor Economy (natural assets and Aboriginal heritage)**
- ✓ **Growing sector (health and social services)**
- Natural Resources (Renewable energy)**

West Wimmera Economic Development Strategy, West Wimmera Shire Council 2016

Purpose	The strategy as well as the associated action plan is a response to the challenge facing the shire in terms of projected population decline by 2026.
Identified priorities	<p>Relevant priority areas for consideration include:</p> <ul style="list-style-type: none"> • Housing development, Exploration of and development of the Rural Living Zone subdivision and lifestyle blocks for the real estate market, housing and housing for workers • New business formation and business expansion • Campaign and advocacy to attract more investment (agriculture) • Transition of agriculture production to the highest value uses. • Promotion of Kaniva Industrial Estate and Edenhope • Local partnership to coordinate annual tourism symposium • Mapping of soil and water resources to identify high value sited for intensive agriculture
Influence on the REDS strategic directions	✓ Agriculture and manufacturing
	✓ Visitor Economy (natural assets and Aboriginal heritage)
	Growing sector (health and social services)
	Natural Resources (Renewable energy)

Horsham Economic Development Strategy

Purpose	The strategy aims to strengthen, enhance and further diversify the existing economic, tourism and industrial base in Horsham Rural City through a collaborative approach, which leads to sustainable growth that improves the wealth and wellbeing of the community.
Identified priorities	<p>The strategy has key themes around:</p> <ul style="list-style-type: none"> • Primary industries: facilitating growth in primary industries including agriculture, processing, mining and renewable energy • Visitor economy — tourism product and events developed to drive visitors to the region to explore nature-based assets and attend unique events/festivals • Infrastructure priority (passenger rail, Horsham Bypass, IT/telecoms, Aerodrome) and attracting investment in critical infrastructure • Health and education sector • Fostering strong pathways between tertiary institutions and the workforce.
Influence on the REDS strategic directions	✓ Agriculture and manufacturing
	✓ Visitor Economy (natural assets and Aboriginal heritage)
	✓ Growing sector (health and social services)
	✓ Natural Resources (Renewable energy)

Victoria Infrastructure Strategy WSM Industry Profile: high level infrastructure priorities 2021–2051

Purpose	<p>The updated strategy builds on the work of the first cross-sectoral infrastructure strategy delivered in 2016, and presents a vision for a thriving, inclusive and sustainable Victoria over the next 30 years.</p> <p>The WSM Industry profile (as part of the background research document into the strategy identifies revealed comparative advantage and infrastructure priorities for each industry with revealed comparative advantages</p>
Identified priorities	<p>The strategy is divided into four themes focused on:</p> <ul style="list-style-type: none"> • Confronting long term challenges • Managing urban change • Harnessing infrastructure for productivity and growth • Developing regional victoria.
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Agriculture and manufacturing ✓ Visitor Economy (natural assets and Aboriginal heritage) Growing sector (health and social services) ✓ Natural Resources (Renewable energy)

Economic Development Strategy and Action Plan, Northern Grampians Shire Council 2021–2031

Purpose	<p>The strategy positions Northern Grampians to be one of Victoria's most thriving, safe and accessible rural regions. The strategy recognises that creativity and innovation will support a productive and sustainable future for Northern Grampians.</p>
Identified priorities	<p>The strategy pursues a range of opportunities including:</p> <ul style="list-style-type: none"> • Natural Resources, cultural and heritage, (growing visitor spend in all our townships, growing intensive agriculture, growing mineral sands and gold projects, Native bush food industry) • Innovation and business sophistication, (Value-adding to agriculture, Growing local business innovation • Skills and capabilities of our people (Regional and rural migration) • Infrastructure and essential services (Renewable energy, Waste and recycling services, Diversify healthcare delivery and export residential care).
Influence on the REDS strategic directions	<ul style="list-style-type: none"> ✓ Agriculture and manufacturing ✓ Visitor Economy (natural assets and Aboriginal heritage) ✓ Growing sector (health and social services) ✓ Natural Resources (Renewable energy)

Hindmarsh Economic Development Strategy, Hindmarsh Shire

Purpose	The Hindmarsh Economic Development Strategy 2015-2020 (EDS) presents the investment, business and community development agenda for industry, business, communities and regional partners.
Identified priorities	<p>The EDS presents six key strategic opportunities/themes:</p> <ul style="list-style-type: none"> • Strengthening health and community services • Enhancing food and beverage capacity • Fostering business and community prosperity • Supporting the development of tourism and events • Economic infrastructure and assets • Building sustainable local administration.
Influence on the REDS strategic directions	<div>✓ Agriculture and manufacturing</div> <div>✓ Visitor Economy (natural assets and Aboriginal heritage)</div> <div>✓ Growing sector (health and social services)</div> <div>Natural Resources (Renewable energy)</div>

Yarriambiack Economic Development and Tourism Strategy

Purpose	The economic Development Strategy outlines current state of the shire's economy and provides strategic direction for the economic and tourism development in the shire.
Identified priorities	<p>Specific initiative and strategic directions have been identified including:</p> <ul style="list-style-type: none"> • Murray Warra Wind Farm Project • Industrial Land Provision and Industrial Estate Feasibility • Community Enterprises (retail, hospitality, recreation enterprise) • Town Entrances, Streetscaping and Landscaping.
Influence on the REDS strategic directions	<div>Agriculture and manufacturing</div> <div>✓ Visitor Economy (natural assets and Aboriginal heritage)</div> <div>Growing sector (health and social services)</div> <div>✓ Natural Resources (Renewable energy)</div>

Victorian Freight Plan — Delivering the Goods, Victoria State Government 2018

Purpose	The plan identifies future challenges and opportunities for the freight and logistics businesses, their employees, and local government the initiatives needed to address these challenges.
Identified priorities	<p>Key priorities include:</p> <ul style="list-style-type: none"> • Reducing the cost of doing business, through infrastructure upgrade and allow Victoria's primary producers, and others in the region who export, to get their products to market efficiently, reliably and cost effectively • Improving the efficiency of moving freight while minimising adverse impacts • Better connecting Victorian businesses with their local, interstate and export markets • Providing sufficient future capacity.
Influence on the REDS strategic directions	<div>✓ Agriculture and manufacturing</div> <div>Visitor Economy (natural assets and Aboriginal heritage)</div> <div>Growing sector (health and social services)</div> <div>Natural Resources (Renewable energy)</div>

Growing What Is Good Country Plan: Voices of the Wotjobaluk Peoples, Barengi Gadjin Land Council Aboriginal Corporation 2016

Purpose	The Plan defines the self-determined vision for the future of the Wotjobaluk People and strong desires for job security, economic stability and self-esteem.
Identified priorities	<p>Priority areas include but are not limited to:</p> <ul style="list-style-type: none"> • Expand cultural tourism beyond Gariwerd (Grampians National Park) • Create enterprises around Wotjobaluk cultural practices • Consider traineeships, cadetships and internships for specific jobs • Creating jobs centred on looking after Wotjobaluk peoples and Country, it also strengthens cultural and community connections.
Influence on the REDS strategic directions	<div>Agriculture and manufacturing</div> <div>✓ Visitor Economy (natural assets and Aboriginal heritage)</div> <div>✓ Growing sector (health and social services)</div> <div>Natural Resources (Renewable energy)</div>

The Gunditjmara Land Justice Story, Native Title Research Unit, The Australian Institute of Aboriginal and Torres Strait Islander Studies

Purpose	Historical story telling document which outlines the journey Gunditjmara to achieve native title status and the implications of the status on Aboriginal people.
Identified priorities	Key priorities include: <ul style="list-style-type: none"> • Develop sustainable farming and Indigenous aquaculture businesses based on eels • Display and restore archaeological heritage • Restoring the environment including Lake Condah and wetlands • Gazetting Cobboboonee State Forest as a national park
Influence on the REDS strategic directions	Agriculture and manufacturing ✓ Visitor Economy (natural assets and Aboriginal heritage) Growing sector (health and social services) Natural Resources (Renewable energy)

Dhelkunya Dja–Dja Dja Wurrung Country Plan, Dja Dja Wurrung Clans Aboriginal Corporation

Purpose	Plan outlining aspirations for the future of the Dja Dja Wurrung people, culture, land and Traditional Owner economy.
Identified priorities	Key prioritise include: <ul style="list-style-type: none"> • Generating sustainable economic and employment opportunities for the Dja Dja Wurrung People • Building a strong natural resource management service industry • Full participation of the Dja Dja Wurrung people in decisions which affect rights and Country • Conserve and protect the environment, in particular where culturally significant places and sites are located • Develop strategic partnerships and joint ventures • Pursue opportunities in the tourism sector • Protect and uphold traditional culture and knowledge • Work with Parks Victoria to establish a Dja Dja Wurrung Women's Ranger team.
Influence on the REDS strategic directions	Agriculture and manufacturing ✓ Visitor Economy (natural assets and Aboriginal heritage) Growing sector (health and social services) ✓ Natural Resources (Renewable energy)

Dja Dja Wurrung —Self Determination Principles, Dja Dja WurrungClans Aboriginal Corporation

Purpose	Framework outlining the rights of Dja Dja Wurrung people in accordance with the Recognition and Settlement Agreement (Native Title).
Identified priorities	<p>Prioritise and focus areas include:</p> <ul style="list-style-type: none"> • Desire to enter Memoranda of Understanding with government agencies and authorities • Pursue social and economic development • Infrastructure and enterprise development that minimises the harmful impacts on Country • All lands, waters and living resources maintained by natural resource managers including Dja Dja Wurrung people.
Influence on the REDS strategic directions	Agriculture and manufacturing
	Visitor Economy (natural assets and Aboriginal heritage)
	Growing sector (health and social services)
	✓ Natural Resources (Renewable energy)

**Dja Dja Wurrung Enterprise (DDWE) Pty Ltd
Business Plan 2021–22**

Purpose	The plan recognises the vision of the DDWE in caring for country, creative enterprises and food and fibre and farming as key areas to develop business opportunities, capacity building, economic development and employment for Dja Dja Wurrung and the Aboriginal community.
Identified priorities	<ul style="list-style-type: none"> • To build a strong natural resource management service industry with a respected brand and a high level of client satisfaction" • There is also interest in the tourism sector as a pathway to tell our stories and share places of cultural significance • Grow our asset base and use it wisely and sustainably to generate economic benefit for Dja Dja Wurrung People
Influence on the REDS strategic directions	Agriculture and manufacturing
	✓ Visitor Economy (natural assets and Aboriginal heritage)
	Growing sector (health and social services)
	✓ Natural Resources (Renewable energy)

Contact us

Department of Jobs,
Precincts and Regions

Level 31, 121 Exhibition Street,
Melbourne, VIC 3000

T: +61 (03) 9651 9999

djpr.vic.gov.au