Goulburn

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 Goulburn Regional Partnership region is on traditional lands, including those lands of the Yorta Yorta, Taungurung and Wurundjeri 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.

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Business and Industry Analysis

Over the past five years, the Goulburn region has realised steady growth in employment and economic output. Driven by Shepparton as the region's major socioeconomic centre, the economy is benefiting from a growing population and emerging service sectors.

- Traditional reliance on Manufacturing and Agriculture as the pillars of regional economic activity have ceded ground to growing Construction and Health Care and Social Assistance sectors. The increasing importance of these industries reflects the changing nature of the local economies.
- Despite a declining share of economic activity, Agriculture, Forestry and Fishing is the most specialised (or concentrated) sector by output and employment in the region. As it relates to output, the region is also specialised in Electricity, Gas, Water and Waste Services, Health Care and Social Assistance, Construction, Retail Trade and Manufacturing.
- Across the region, 11 (of 19) sectors have grown in the last 5 years. These strong results were led by Mining (up 86.5% pts over five years), Construction (up 42.5% pts) and Health Care and Social Assistance (up 22.5% pts).

The region's international export value has consistently increased over the past decade and now totals $1.34 billion. Tourism has also realised strong growth, with most of the region's 4.34 million visits coming from domestic tourists.

- Goulburn is well connected with Melbourne's air and seaports which has enabled strong export growth, particularly in food product manufacturing, fruit, dairy and beef.
- The region's parks, including Lake Eildon, Murray River and the Cathedral Ranges, and its vibrant food and wine scene make tourism a significant contributor to the region's economy, particularly for Murrindindi Shire.

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 Goulburn 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

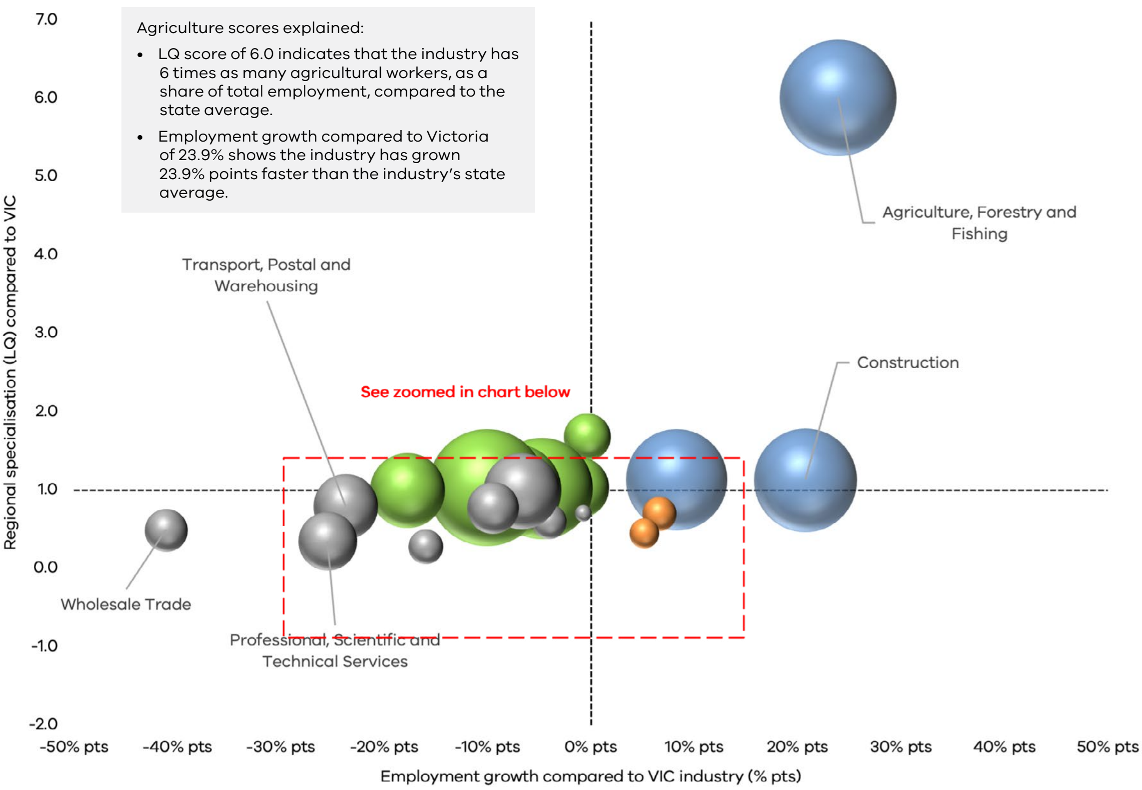
The position on the vertical axis indicates the industry's degree of employment specialisation (location quotient) [1] relative to the Victorian economy. For example, a value of 4.0 means that, as a share of total employment in the local economy, the industry employs four times as many people than the Victorian average[2]. The position on the horizontal axis indicates the difference in each industries' employment growth (2015 to 2020[3]) 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 number of people employed in the industry.

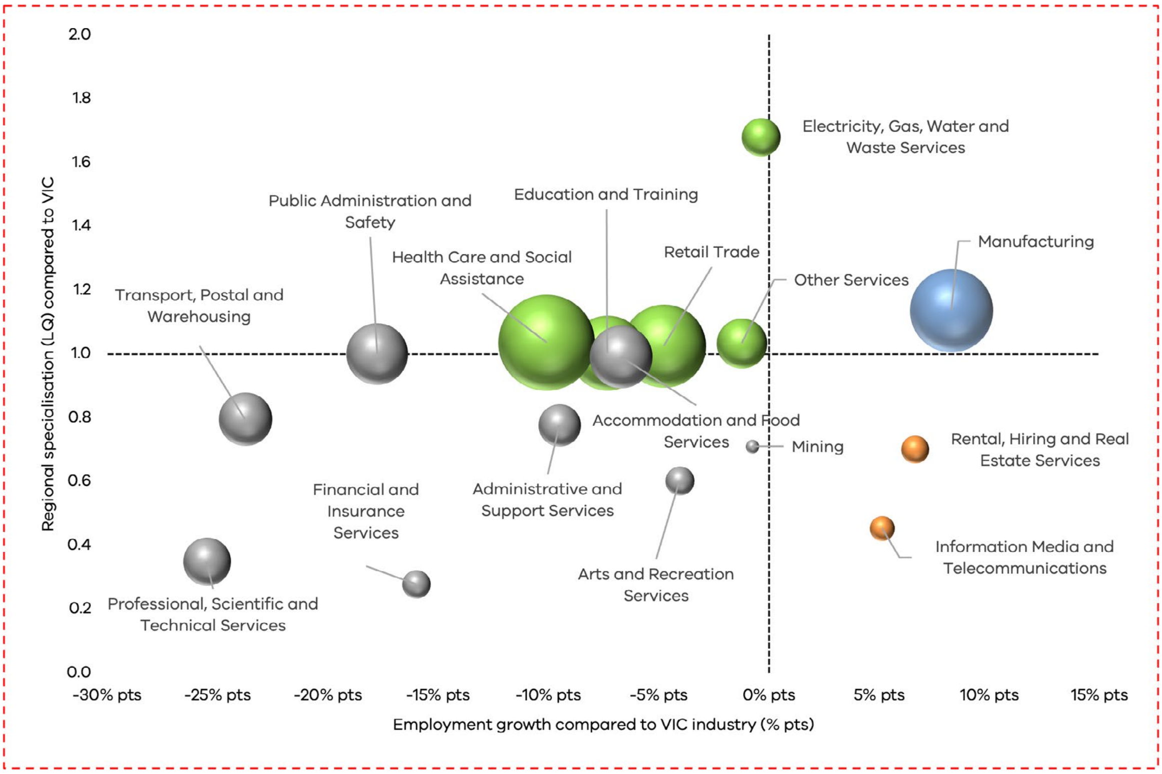
1. The Location Quotient tells us how regions compare to that of the broader economy in terms of size. Where there is variation in size relative to the broader economy LQ can be an indicator of strength and 'importance' to the future of the economy. However, it is only one indicator and further analysis 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 and Electricity, Gas, Water and Waste Services. These industries represent over 15 per cent of Goulburn's employment, with Agriculture, Forestry and Fishing contributing over 13 per cent alone. Among subindustries, Agriculture, Food Product Manufacturing, Water Supply, Sewerage and Drainage Services, Heavy and Civil Engineering Construction, Food Retailing, Defence, Preschool and School Education, and Residential Care Services recorded strong employment specialisation.

The region has outpaced the state in employment growth across the large employing industries of Agriculture, Forestry and Fishing, Construction and Manufacturing. Of the industries which lagged average employment growth across the state, a number of industries have employment shares (or LQ ratings) close to 1. This is particularly evident in services-based industries driven by population growth, such as education and healthcare.

When metropolitan Melbourne is excluded, and the region is compared with the rest of regional Victoria, Goulburn remains specialised in Agriculture, Forestry and Fishing, and Electricity, Gas, Water and Waste Services industries. The stability across two different comparator groups demonstrate the strength of the region's employment advantage in its two specialisations.

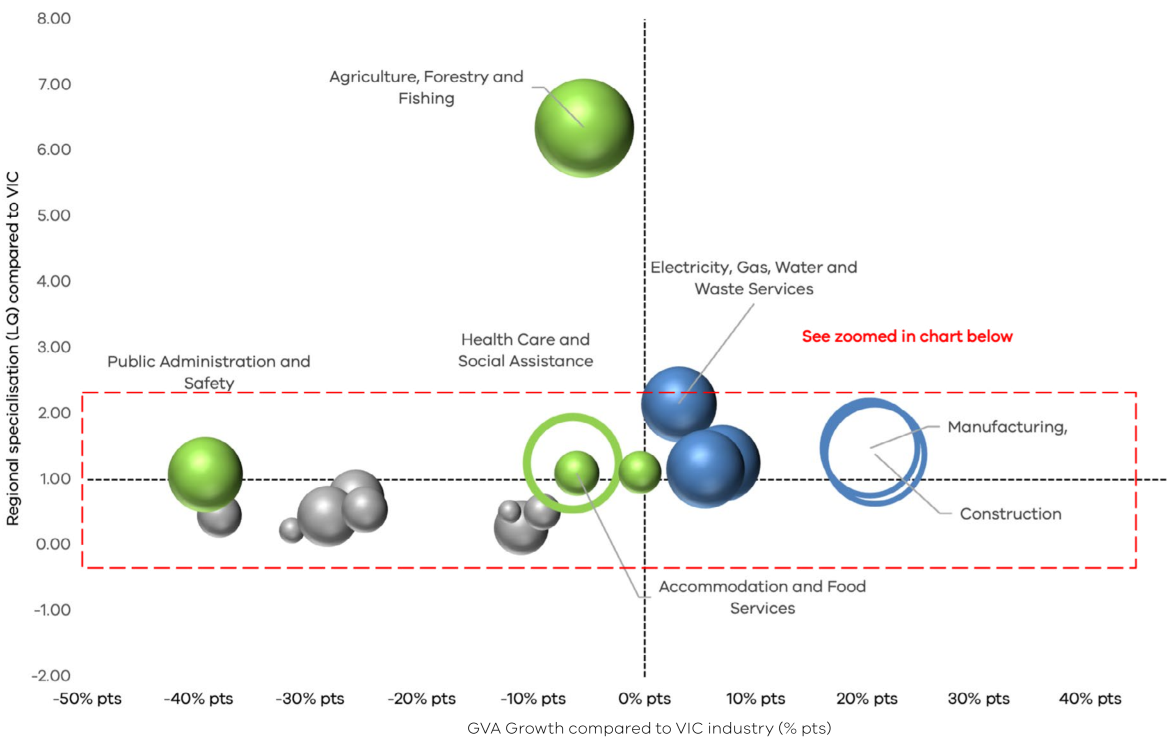
LQ analysis, GVA

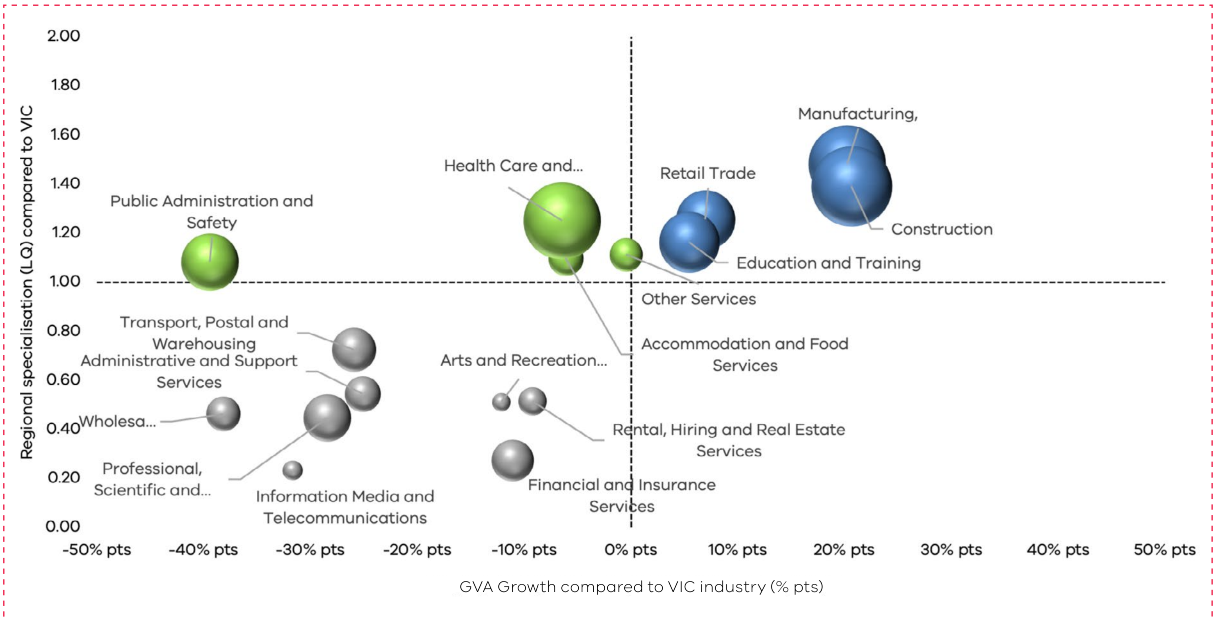
Figure 1.1.2 (below) identifies the region's economic output specialisations in terms of Gross Value Added (GVA). Using the same approach as above, this analysis compares industries' size and growth as a proportion of total economic GVA relative to Victorian averages. While the employment LQ captures the industry concentration of the regional workforce, it does not capture the economic contribution of employment in terms of GVA. 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)

Agriculture, Forestry and Fishing scores explained:

- LQ score of 6.35 indicates that the industry is 6.35 times larger, as a share of total GVA, than the state average
- GVA growth (decline) was 5.4% pts lower than the state industry growth over 5 years





(NIEIR, 2020) Note: For visibility of all sectors some bubbles have been represented as rings, the circumference of the circle is taken as size of the bubble.

As represented in Figure 1.1.2, the region is most specialised in Agriculture, Forestry and Fishing, as well as Manufacturing; Electricity, Gas, Water and Waste Services, Construction, Retail Trade and Health Care and Social Assistance. Of these sectors, Manufacturing and Construction both recorded growth in GVA over the past five years well above state-wide levels (20.2% pts and 20.6% pts respectively). Despite remaining a significant contributor to regional output, Agriculture, Forestry and Fishing recorded a fall in GVA, greater than the decline observed across the state for this industry (by 5.4% pts).

At a subindustry level, Goulburn is specialised in Agriculture, Food Product Manufacturing, Water Supply, Sewerage and Drainage Services, Waste Collection, Treatment and Disposal Services, Heavy and Civil Engineering Construction, Construction Services, Food Retailing, Road Transport, Defence, Preschool and School Education, Residential Care Services, and Repair and Maintenance.

Shift-Share Analysis

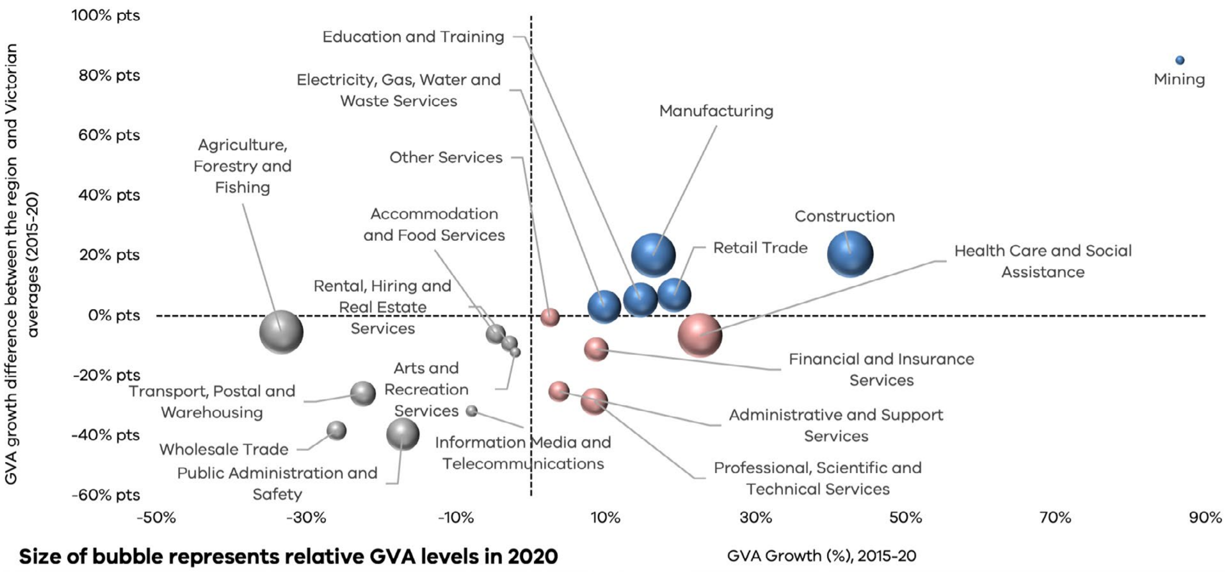
Shift-Share Analysis is used to better understand the drivers of regional economic growth. The analysis breaks industry growth into two drivers of change: (1) a Victorian state industry effect and (2) a local effect. By decomposing the drivers, the analysis identifies whether an industry's growth reflects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

In figure 1.1.3 The position on the vertical axis indicates the difference in each industry's average GVA growth (2015-20) 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.

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

(blue)	Blue industries which are outperforming the average industry growth rate in Victoria
(pink)	Pink industries which are underperforming the average industry growth rate in Victoria but are producing greater output over time
(grey)	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)

As represented in Figure 1.1.3, Goulburn outperforms the average Victorian growth in Mining; Manufacturing; Construction, Electricity, Gas, Water and Waste Services, Retail Trade and Education and Training. Each of these sectors recorded a net increase in GVA over the past five years. This suggests that Goulburn has competitive advantages in the sectors relative to Victoria, and that the sectors are significant drivers of growth. Since the region outperforms state levels of growth across several sectors, the analysis suggests that localised factors contribute to successes.

Despite five of Goulburn's other industries recording growth in GVA, all underperformed relative to the Victorian average. These include, Health Care and Social Assistance, Administrative and Support Services, Financial and Insurance Services, Professional, Scientific and Technical Services and Other Services. These industries are all growing in the region however they are not experiencing the same degree of growth seen state-wide.

The region exhibits further strengths among its subindustries. Over the past five years, Food Product Manufacturing, Water Supply, Sewerage and Drainage Services, Waste Collection, Treatment and Disposal Services, Building Construction, Heavy and Civil Engineering Construction, Construction Services, Other Store-Based Retailing, Defence, Residential Care Services, Personal and Other Services all outperformed the state's average growth rate.

Strong results across a several sectors indicates the comparative strength of the region. Consistently outperforming state averages demonstrates that there are 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

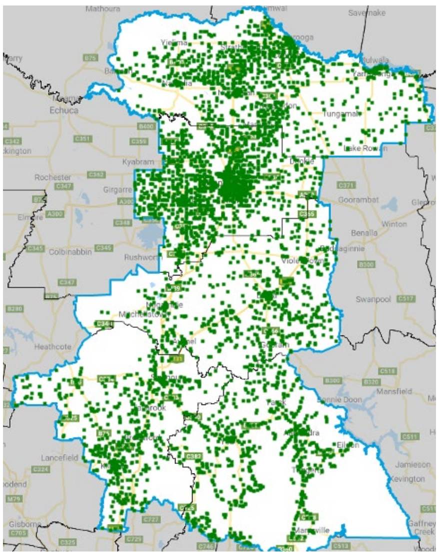
Table 1.1.4: Industry Cluster Analysis

Sector	LQ (Employment)	LQ (Business count[5])	Clusters
Agriculture, Forestry and Fishing	6.0	4.6	✓
Mining	0.7	1.2	×
Manufacturing	1.1	1.2	×
Electricity, Gas, Water and Waste Services	1.7	1.0	?
Construction	1.1	1.1	×
Wholesale Trade	0.5	0.7	×
Retail Trade	1.0	0.9	×
Accommodation and Food Services	1.0	0.9	×
Transport, Postal and Warehousing	0.8	0.8	×
Information Media and Telecommunications	0.5	0.5	×
Financial and Insurance Services	0.3	0.6	×
Rental, Hiring and Real Estate Services	0.7	0.7	×
Professional, Scientific and Technical Services	0.3	0.5	×
Administrative and Support Services	0.8	0.8	×
Public Administration and Safety	1.0	0.8	×
Education and Training	1.0	0.6	×
Health Care and Social Assistance	1.0	0.6	×
Arts and Recreation Services	0.6	0.7	×
Other Services	1.0	1.2	×

(ABS, 2021) (NIEIR, 2020)

With higher concentrations than the state average, the region has strong clusters in Agriculture, Forestry and Fishing. This is the only industry that has a higher concentration in both employment and business count than the state average. While the region has employment specialisation in Electricity, Gas, Water and Waste Services, it does not appear to correlate with a high concentration of businesses.

Figure 1.1.5: Agriculture, Forestry and Fishing businesses



(REMPLAN, 2021)

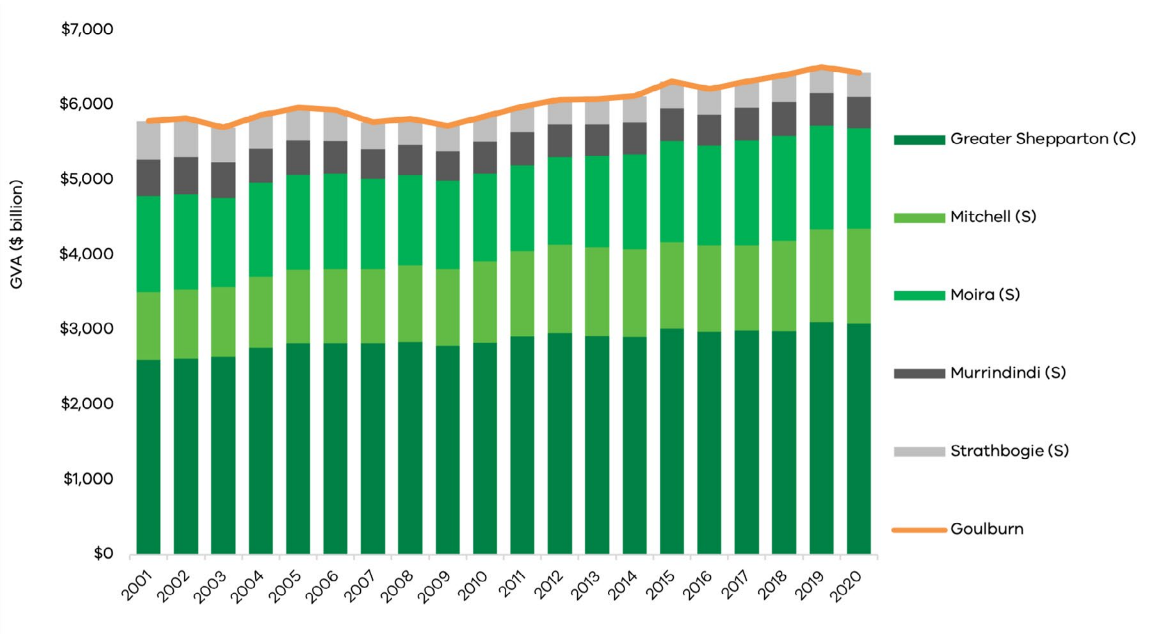
5. Business count sourced from REMPLAN and includes all active GST trading businesses with the exception of family trusts and self-managed superannuation funds

Gross Value Add

Since the turn of the century, the Goulburn region has seen growth in Gross Value Add (GVA). The region's total GVA rose from $5.8 billion in FY2001 to $6.4 billion in FY2020 (see Figure 1.1.6). This growth was most concentrated between FY2009 and FY2015 and FY2016 and FY2019.

At an LGA level, trends vary. Greater Shepparton is the largest contributor to GVA in the region and has accounted for the largest growth in the region since FY2001. Moira and Mitchell shires are the second and third largest contributor to the region's GVA, both of which have experienced growth between FY2001 and FY2020. In comparison, Strathbogie and Murrindindi are the smallest contributors to the regions GVA. Both LGAs have seen small declines in GVA over the past two decades.

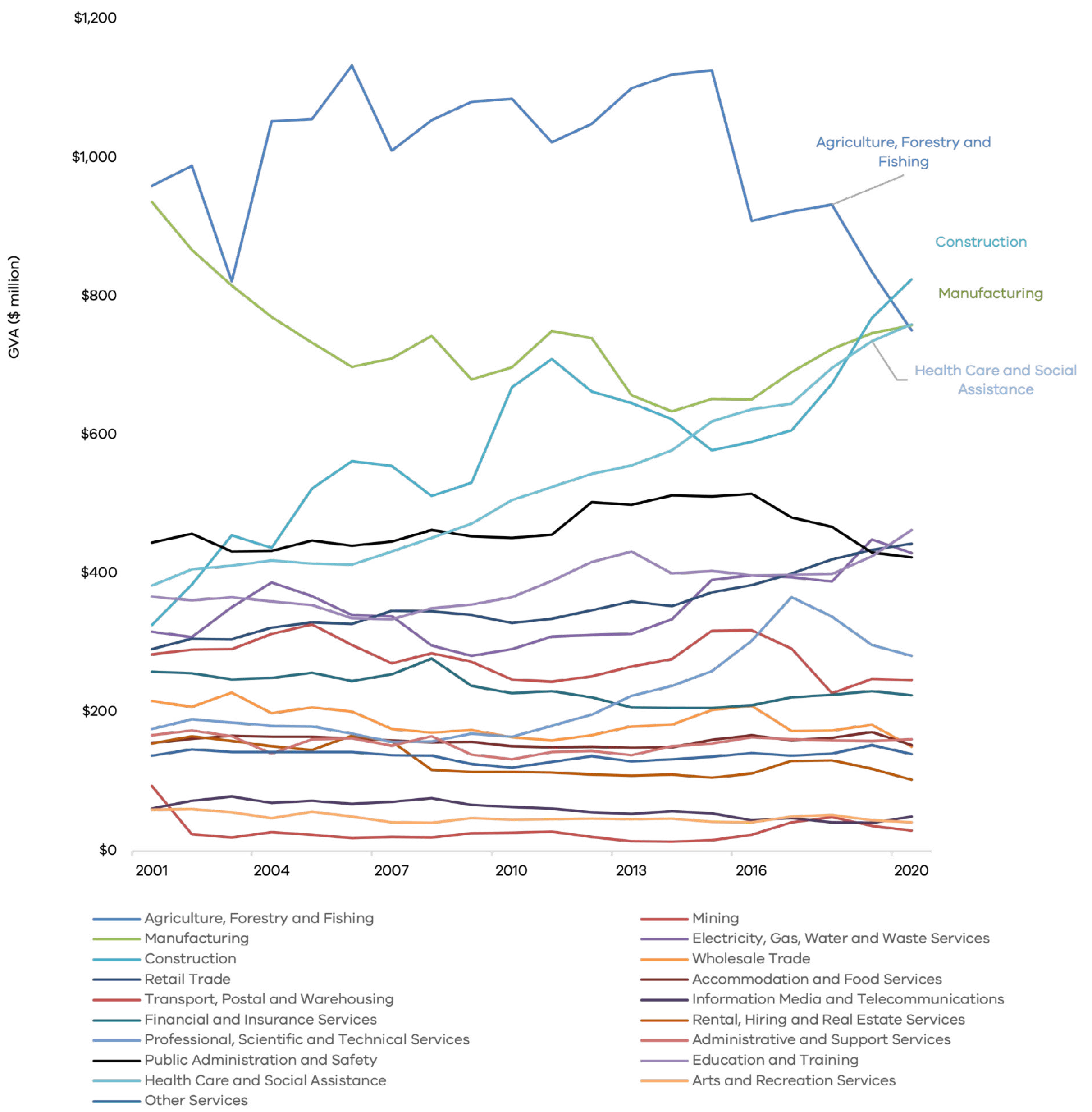
Figure 1.1.6: GVA over time by LGA



(NIEIR, 2020)

Despite fluctuations over the past two decades, Agriculture, Forestry and Fishing and Manufacturing are the largest and third largest contributor to GVA in the region respectively. On the other hand, growth in Construction over the past two decades (particularly between FY2001 and FY2011 and FY2015 and FY2020) and steady growth in Health Care and Social Assistance places them as the second and fourth most significant contributors to GVA in the region (see Figure 1.1.7).

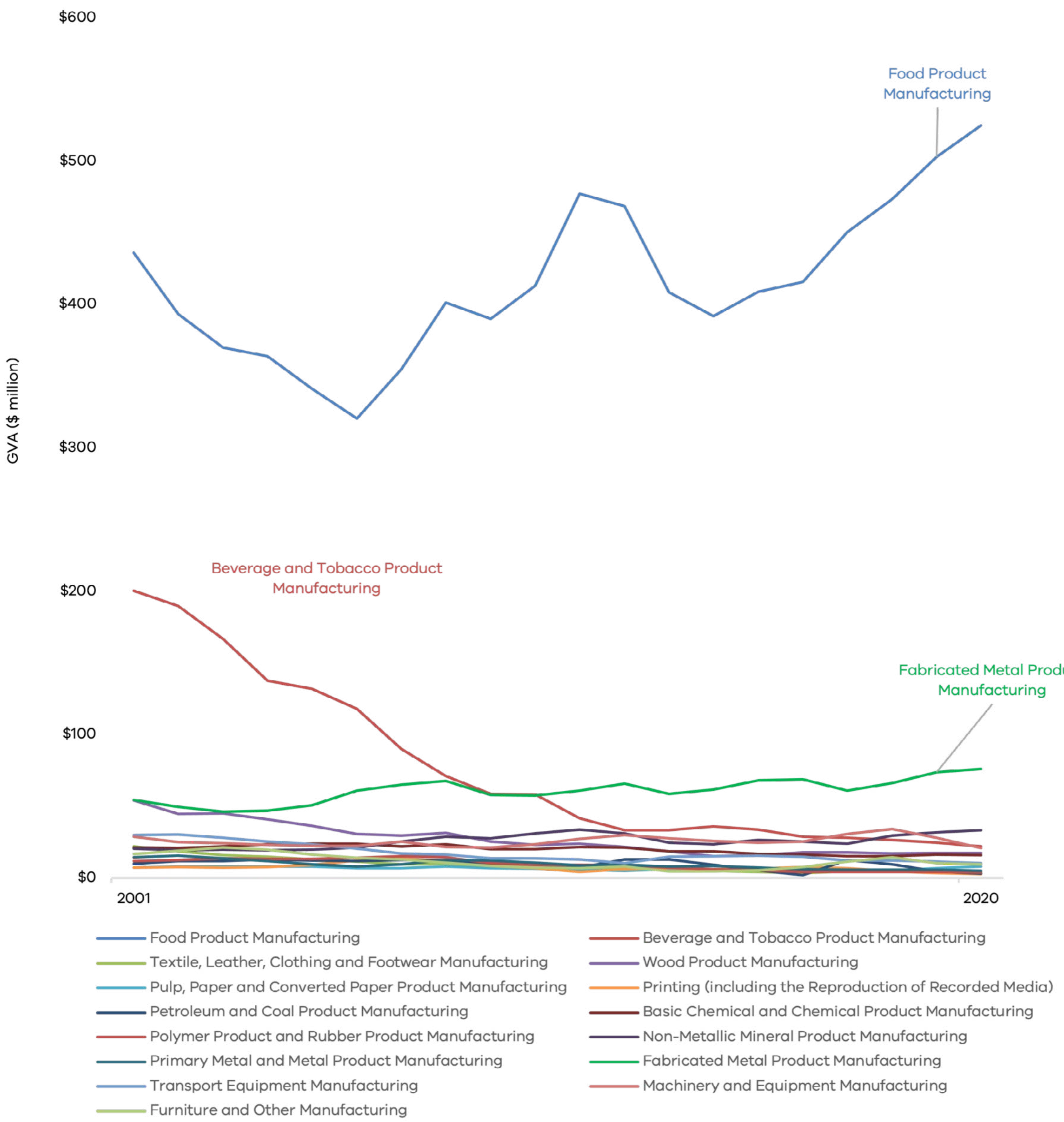
Figure 1.1.7: GVA by industry



(NIEIR, 2020)

At a subindustry level, Food Product Manufacturing has the most significant impact on the industry's GVA. Food Product Manufacturing experienced significant growth at the start of century, as the region experienced a decline in Beverage and Tobacco Product Manufacturing (see Figure 1.1.8). Between FY2011 and FY2014 there was a decline in the Food Product manufacturing subindustry, before growing again until FY2019.

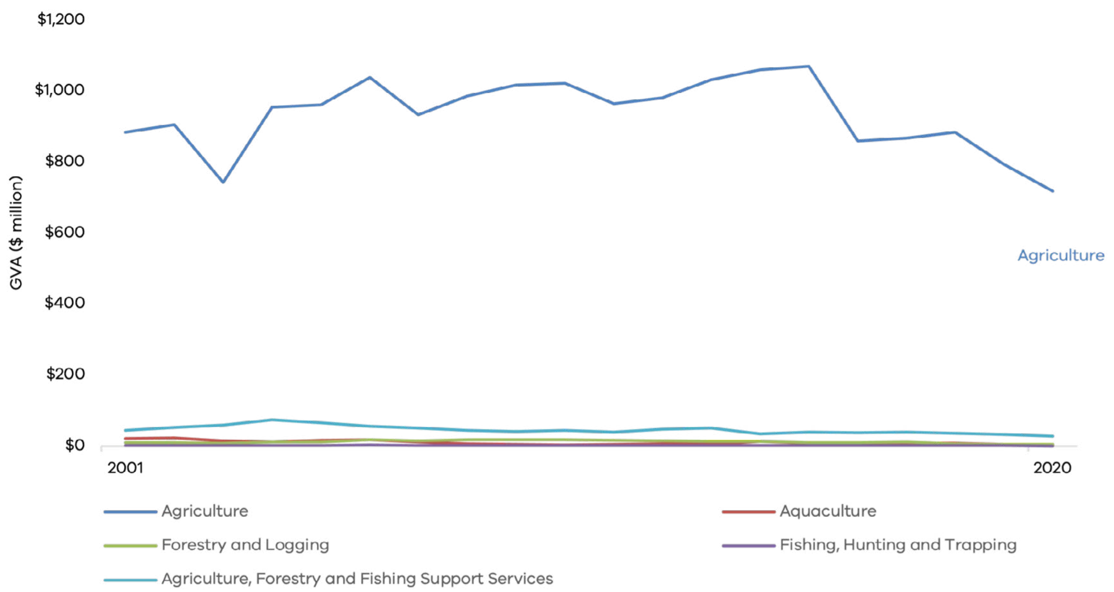
Figure 1.1.8: Manufacturing GVA



(NIEIR, 2020)

The Agriculture, Forestry and Fishing industry in the Goulburn region is driven by Agriculture, which has strong fruit, livestock and dairy commodity output (see Figure 1.1.9).

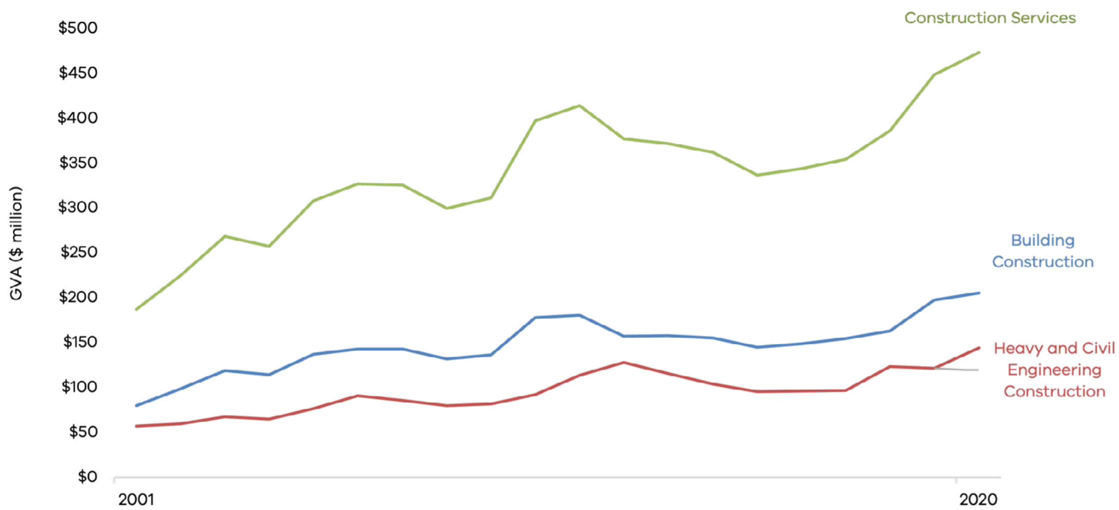
Figure 1.1.9: Agriculture, Forestry and Fishing GVA



(NIEIR, 2020)

Construction Services is the largest contributors to the Construction industry's GVA (see Figure 1.1.10). Building Construction and Heavy and Civil has experienced steady growth over the past two decades.

Figure 1.1.10: Construction GVA

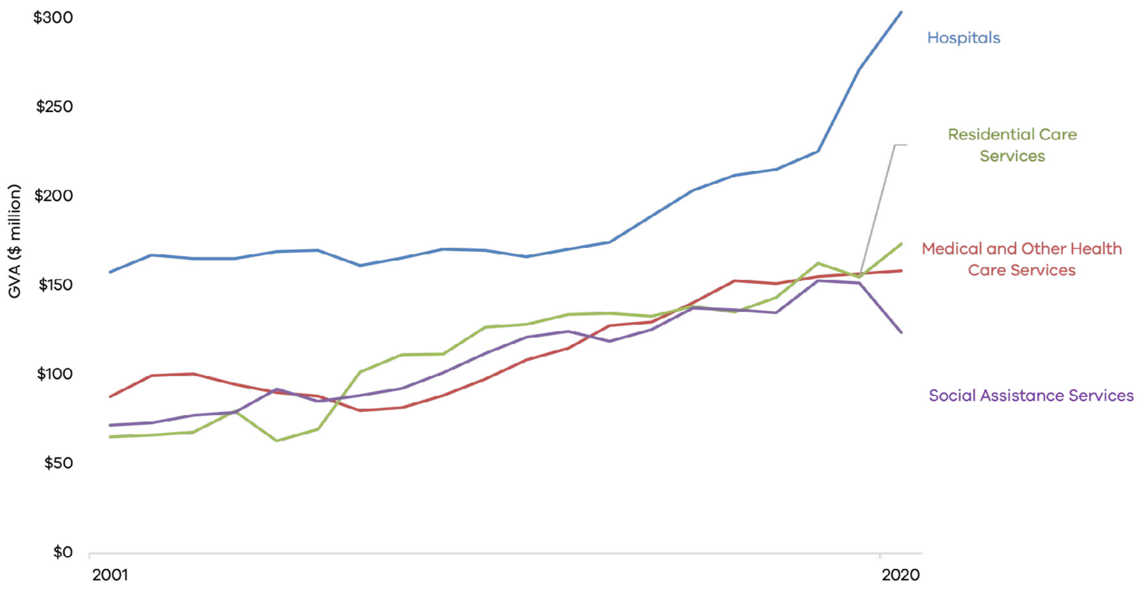


(NIEIR, 2020)

GVA growth realised across Construction Services and Building Construction subindustries has been driven by Mitchell Shire and Greater Shepparton, over the past five years. This trend is supported by population growth in the two municipalities.

Consistent with the rest of the state and partly explained by population and demographic changes, Health Care and Social Assistance has realised steady growth over time. Most notable has been the substantial growth in the Hospitals, Residential Care Services and Medical and Other Health Care Service subindustries in recent years (see Figure 1.1.11).

Figure 1.1.11: Health Care and Social Services GVA



(NIEIR, 2020)

Business growth

Over the past five years, more than 4,300 new businesses have established themselves in the Goulburn region, mostly concentrated around Shepparton. By industry, the highest proportion were in Construction (21 per cent or 893 businesses) and Agriculture, Forestry and Fishing (17 per cent or 725 businesses). Among subindustries, Sheep and Beef Cattle Farming, Sheep, Beef and Grain Farming, and Other Agricultural and Fishing Support Services accounted for 510 of the Agriculture, Forestry and Fishing new businesses.

Other industries of significant business growth are:

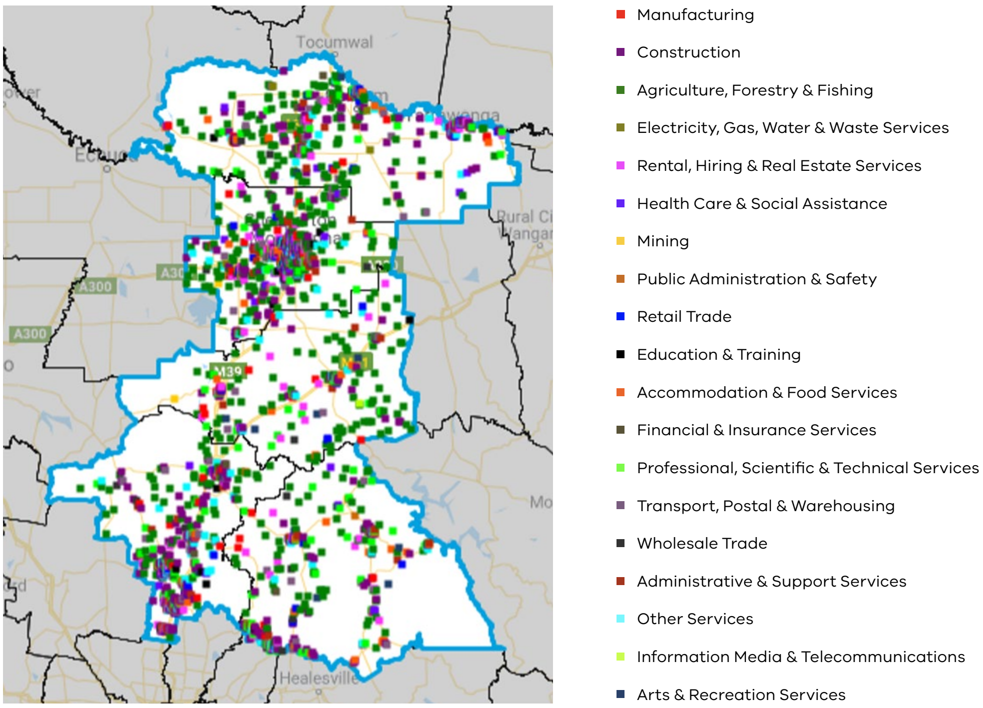
- Transport, Postal and Warehousing (485 new businesses),
- Professional, Scientific and Technical Services (349 new businesses),
- Other Services (276 new businesses), and
- Administrative and Support Services (257 new businesses).

Among subindustries, significant business growth has occurred among:

- Road Freight Transport (208 new businesses),
- Taxi Drivers (115 new businesses),
- Electrical Services (110 new businesses),
- Cafés and Restaurants (107 new businesses), and
- Carpentry Services (105 new businesses).

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

Figure 1.1.12: Business Entries (September 2015 to September 2020)



Source: (REMPLAN, 2021)

International Exports[6]

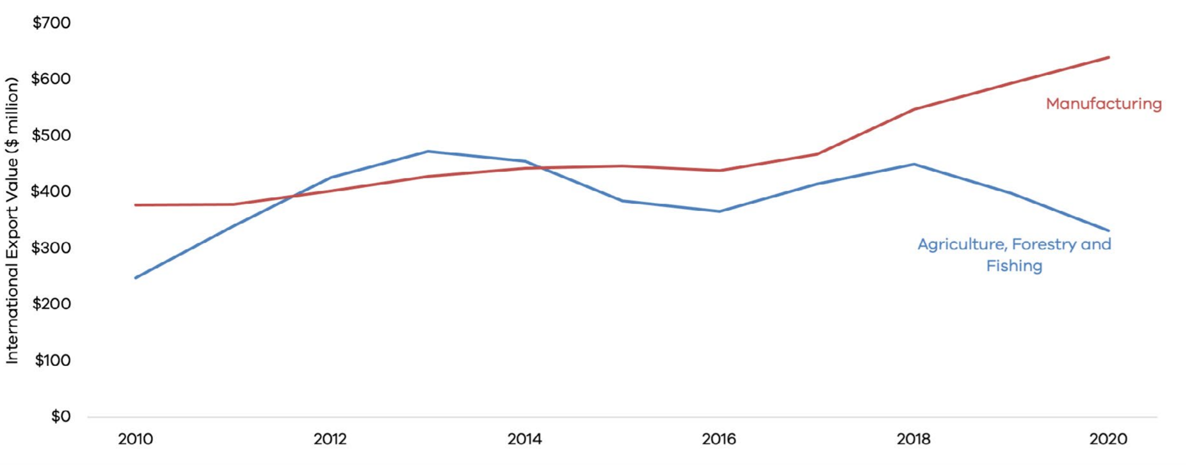
Located between Sydney and Melbourne with strong road links to Melbourne's air- and seaports via the Hume and Goulburn Valley Freeways, the region is well connected with international markets. International export value from the region has steadily increased over the past decade from $812.2 million in 2010 to $1.2 billion in 2020.

Representing 52.0% of total value in 2020, Manufacturing products are the primary contributor to growth, peaking at $640.0 million in value in 2020. Food Product Manufacturing has driven the industry over the past decade and in 2020 it represented 85.6 per cent of industry value. The region is one of Victoria's most significant food processing locations with centres in Shepparton, Cobram and Broadford. Activities are focussed on dairy product and fruit and vegetable processing, as well as beer and wine making. Beyond food, in 2020 the region also exported $20.2 million in Primary Metal and Metal Product Manufacturing Product, and $19.4 million in Basic Chemical and Chemical Product.

The second most significant exporting industry is Agriculture, Forestry and Fishing. Fruit, particularly apples, pears and stone fruit, dairy and beef are the region's most valuable agricultural exports. China, Hong Kong and India are the biggest importers of Victoria's horticultural products. Meanwhile, led by Japan, China and Indonesia, Asian markets account for over 80 per cent of Victoria's dairy exports, while the United States leads China and Japan as most significant beef markets. Agricultural export value has declined since 2018 due largely to the impact of record-high water prices, and subsequently exacerbated by COVID-19 and China's imposition of trade restrictions on key Australian commodities, including pome fruit, and challenges re-listing abattoirs following a COVID-19 induced pause on trade.

The two major sectors together comprised 79.0 per cent of total export value in 2020. Other smaller but relatively significant sectors are Accommodation and Food Services (worth $60.6 million in export value in 2020), Transport, Postal and Warehousing (worth $41.8 million) and Wholesale Trade (worth $38.6 million).

Figure 1.1.13: International Export Value, Key Industries



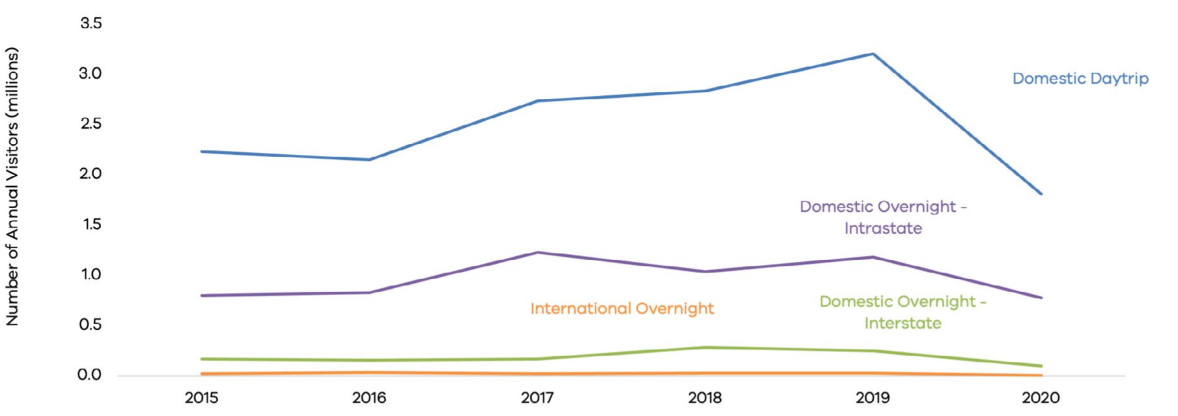
(NIEIR, 2020)

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

Visitor Economy

The region's parks, including Lake Eildon, Murray River and the Cathedral Ranges, and its vibrant food and wine scene make tourism a significant contributor to the Goulburn economy, particularly for Murrindindi Shire. Prior to COVID-19, visitor numbers and expenditure were growing year-on-year. 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 significantly impacted the region's visitor economy. The total number of domestic daytrip, and domestic and international overnight visitors fell from 4.7 million in 2019 to 2.7 million in 2020. This decline led to a fall in total visitor expenditure; from $836 million in 2019 to $399 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 1.1.14: Visitation Overview (2015–2020)[7]



(Tourism Research Australia, 2021a)

From 2019 to 2020, the number of international and domestic interstate overnight visitors has fallen by 80.0 per cent and 60.0 per cent respectively, substantially more than the declines in domestic day-trippers (43.6 per cent) and domestic intrastate visitors (34.7 per cent).

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. Being proximate to metropolitan Melbourne and located on the New South Wales border should see the region well-placed to attract higher spending and longer staying overnight visitors. However, unlike other parts of the state, the region is not currently realising these benefits; average visitor spend is lower in 2020 than 2019, in part because overnight visitors are not staying as long in the region.

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

Table 1.1.15: Visitation & Average Spend (2019 – 2020)[8]

	Number of Visitors		Average Visitor Spend	
	2019	2020	2019	2020
Domestic Daytrip	3,203,000	1,806,000	$95	$88
Domestic Intrastate Overnight	1,184,000	773,000	$322	$275
Domestic Interstate Overnight	249,000	99,000	$468	$231
International Overnight	26,000	5,000	$1,353	$790

Source: (Tourism Research Australia, 2021a)

Most of the region's tourism businesses are small enterprises. In 2019, there was 1,653 tourism businesses across the region. Of these, 76.3 per cent have four employees or fewer, with 40.3 per cent sole proprietors.

Just 3.4 per cent of businesses have 20 or more employees.

Table 1.1.16: Average Number of Tourism Businesses (2016 – 2019)

Local Government Area	Tourism Businesses
Greater Shepparton	682
Mitchell	339
Moira	326
Murrindindi	192
Strathbogie	114
Total	1,653

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, Goulburn has experienced steady population growth. Notwithstanding the impacts of COVID-19, these trends are expected to continue.

- For all LGAs, migration (domestic or international) has been the most important contributor towards population growth.
- Regional growth has been driven by Mitchell and, to a lesser extent, by Greater Shepparton LGAs. This trend reflects the growing liveability appeal of regional cities and the peri-urban fringe for those seeking to move away from metropolitan Melbourne.
- 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.

While overall population growth is strong, there is significant outward migration of young people (aged 15-24 years) across all LGAs.

- This movement is consistent with trends across regional Victoria and reflects lower access to employment, training and education pathways.

Population and population growth

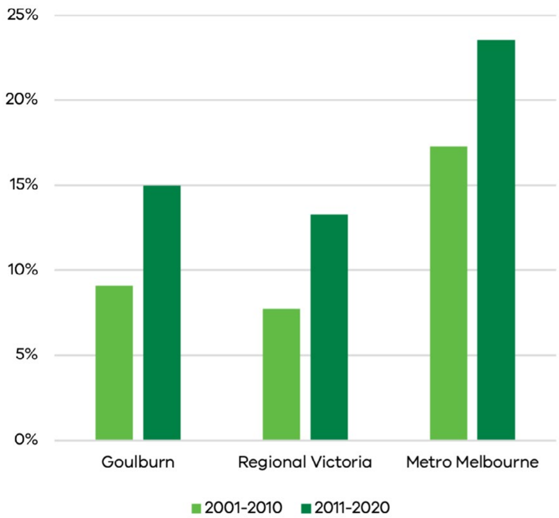
In 2020, Goulburn was home to an estimated resident population of 170,388 people. 67,070 (39 per cent) of these lived in Greater Shepparton; 47,647 (28 per cent) in Mitchell Shire; 30,018 (18 per cent) in Moira Shire; 14,661 (9 per cent) in Murrindindi Shire; and 10,992 (6 per cent) in Strathbogie Shire.

Goulburn's population increased by 9.1 per cent between 2001 and 2010 and by 15.0 per cent between 2011 and 2020. While growth rates significantly underperform metropolitan Melbourne over the same periods, they outpace average growth across regional Victoria (see Figure 1.2.1).

Goulburn's population was forecast to continue to grow strongly over the next ten years however, the impacts of COVID-19 on domestic and international migration is likely to alter previous forecasts (see Figure 1.2.2).

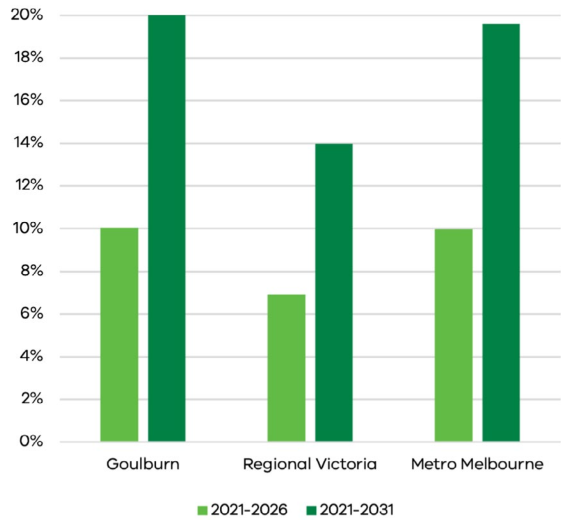
Across LGAs, population growth was driven by Mitchell Shire, supported by the municipality's proximity to metropolitan Melbourne and the effects of urban sprawl and long-distance commuting. Greater Shepparton, as the region's major socioeconomic centre, is growing at a slower rate while Moira, Murrindindi and Strathbogie Shires have realised slower population growth in recent years (see Figure 1.2.3).

Figure 1.2.1: Population Growth



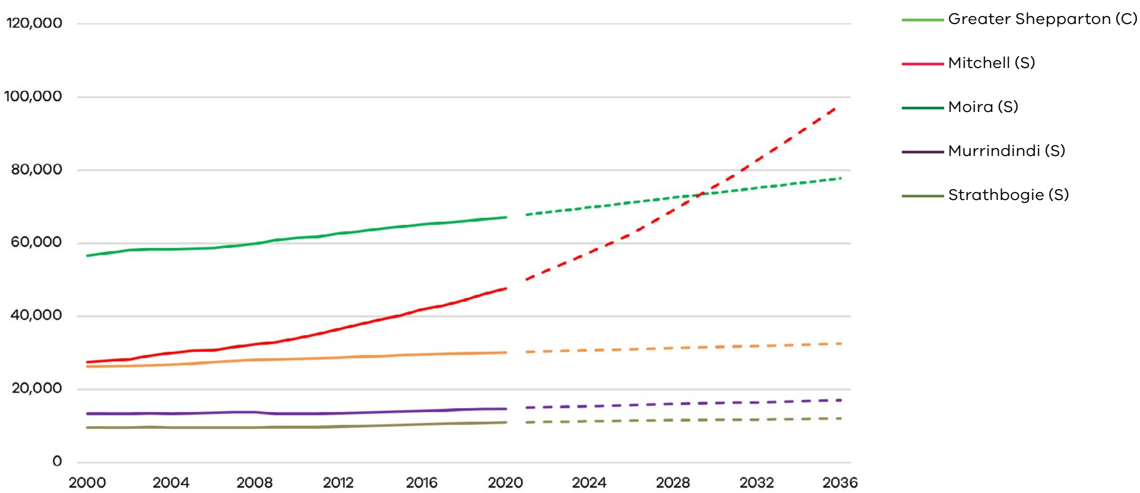
Source: (Australian Bureau of Statistics (ABS), 2020a)

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)

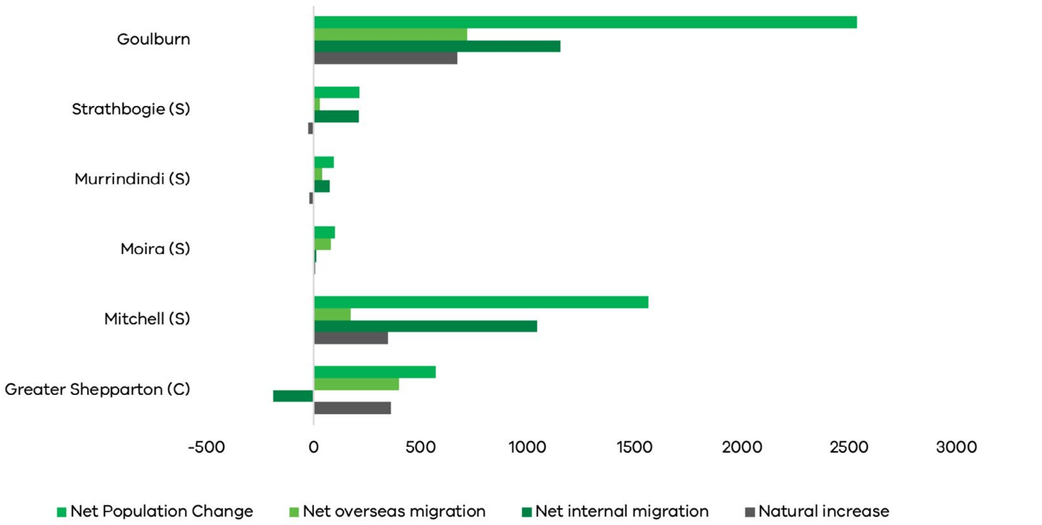
Components of population change

Between 2019 and 2020, population growth in Goulburn was realised via positive net internal migration (NIM), natural increases and net overseas migration (NOM) (see Figure 1.2.4).

Mitchell Shire has experienced large numbers of Australians moving into the municipality, as well as natural increases (number of births exceeding the number of deaths) and an inflow of international migrants. Part of the shire's appeal stems from its geographical proximity to metropolitan Melbourne, while maintaining the attractions of regional living. In contrast, Greater Shepparton has realised natural population increases and an inflow of international migrants but an outflow of residents. Finally, Moira, Murrindindi and Strathbogie Shires are experiencing marginal increases in population. In Strathbogie and Murrindindi Shires, this is predominantly being led by internal migration whereas Moira Shire's growth is mostly comprised of overseas migrant inflows.

Population growth across the region is diverse. As government and local leaders plan for growth, it is important to recognise that the population drivers substantially differ across the region's LGAs, and therefore policy responses should vary. Furthermore, the impacts of COVID-19 on population drivers are likely to differ across components and geography.

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



Source: (ABS, 2021)

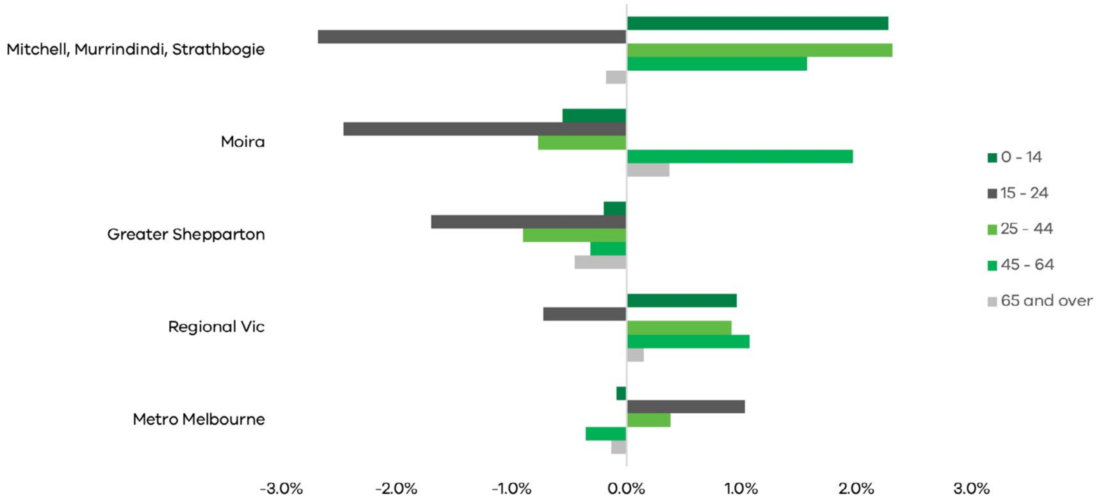
Regional internal migration

While all LGAs recorded positive population growth over the 2019-2020 period, a breakdown of net internal migration by age shows a significant outflow of those aged 15 to 24 years. This is evident across all LGAs and it is at a higher rate than the regional Victorian average (see Figure 1.2.5).

Across LGAs, Greater Shepparton had the lowest rate of those aged 15 to 24 years leaving the LGA. This could be driven by a relatively strong tertiary education system and a more diversified economy, which provides young people with more employment opportunities than some other regional communities.

Among the 25 to 44 years cohort, the northern LGAs of Moira Shire and Greater Shepparton have experienced outward migration, while the southern LGAs of Mitchell, Murrindindi and Strathbogie are experiencing above average inwards migration.

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.

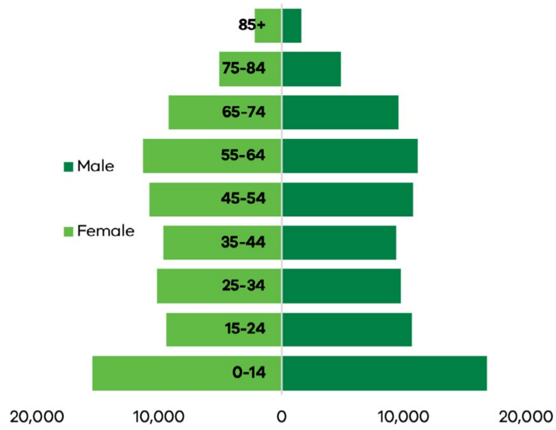
Note: the ABS time series of internal migration is broken at 2016 to align with new statistical regions. 2016-18 insights are consistent with the movements represented in previous statistical regions where alignment is possible.

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.

Population cohort analysis

Goulburn's population is 49.8 per cent female and 50.2 per cent male. With a median age of 41 years, Goulburn is slightly younger than the median age across regional Victoria (42 years) but significantly older than metropolitan Melbourne (36 years). The working aged population (15 to 64 years) comprises 61.4 per cent of the population and 19.4 per cent of the population are aged 65 years or older (see Figure 1.2.6).

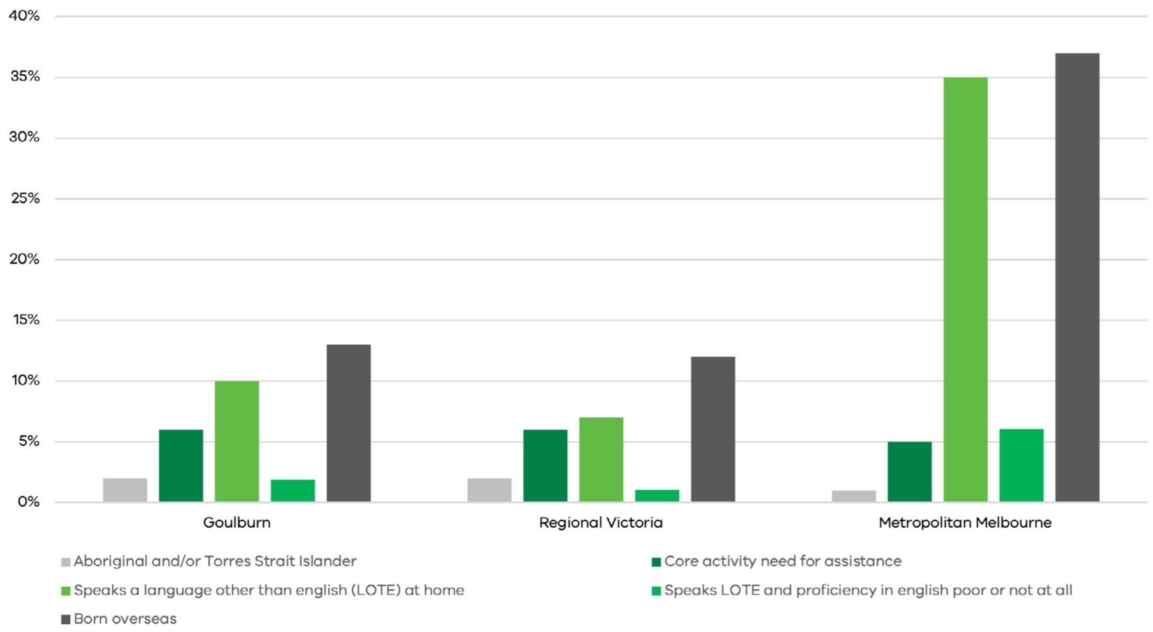
Figure 1.2.6: Population by Age



Source: (ABS, 2020c)

2.3 per cent of the region's population is Aboriginal and Torres Strait Islander while 6.4 per cent live with a disability. Both measures are consistent with regional rates however slightly higher than the proportions observed in metropolitan Melbourne. By regional standards Goulburn has a relatively high proportion of culturally and linguistically diverse (CALD) residents; 10.0 per cent of the population speak a language other than English at home; 1.9 per cent speaks a language other than English with poor to no proficiency in English; and 13.0 per cent are born overseas. All these measures exceed regional Victorian averages but remain significantly lower than metropolitan Melbourne (see Figure 1.2.7).

Figure 1.2.7: Population Cohorts



Source: (ABS, 2016a)

1.3
Socio-Economic Profile

Despite overall growth in employment and economic output over the past five years, successes have not been equally realised across the region and cohorts.

- As it relates to household incomes, socio-economic disadvantage and educational attainment, Goulburn tends to perform in line with regional Victorian averages.
- While Mitchell and Murrindindi shires are relatively well off, Greater Shepparton and Moira LGAs tend to underperform the region across socio-economic measures.
- Local Aboriginal and Torres Strait Islanders have poorer outcomes across labour force engagement and income measures in comparison to general population rates in Goulburn and regional Victoria.

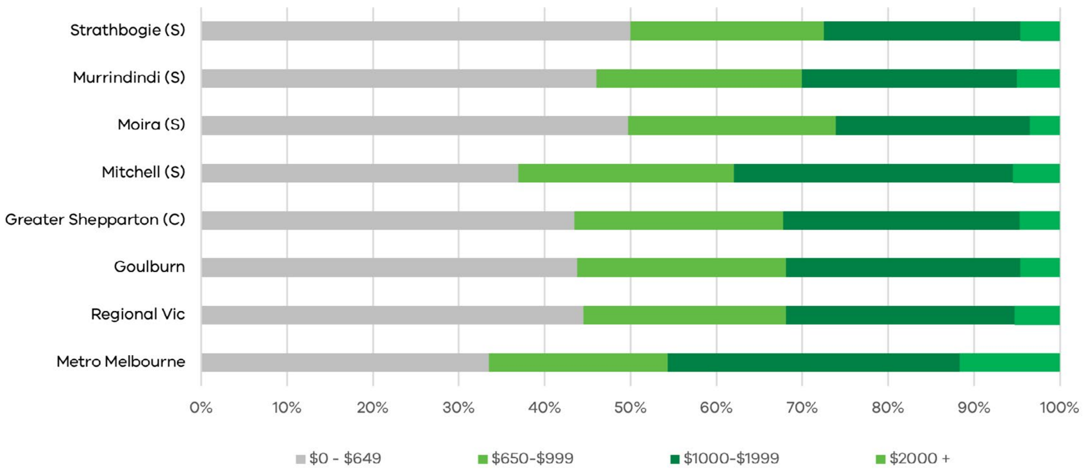
Variable performance across the region indicates that there remains significant opportunities to improve educational attainment, engage disadvantaged cohorts and lift wages.

Income

Goulburn's household incomes are broadly consistent with regional averages. Five per cent of households in the region sit in the upper income bracket, earning over $2,000 per week. This rate is equivalent to the regional average however lags the metropolitan Melbourne rate of 12 per cent. In the lower income bracket, 44 per cent of households earn below $650 per week. This rate is marginally lower than the regional average of 45 per cent but exceeds metropolitan Melbourne's 34 per cent.

At an LGA level, Mitchell shire is a higher income municipality; 38 per cent of households earn more than $1,000 per week. This exceeds both the Goulburn (32 per cent) and regional Victorian (32 per cent) averages. Conversely, Moira and Strathbogie are lower income municipalities; both shires have over 50 per cent of households earning less than $650 per week (see Figure 1.3.1).

Figure 1.3.1: Household Income Distribution (Weekly)



Source: (ABS, 2016b)

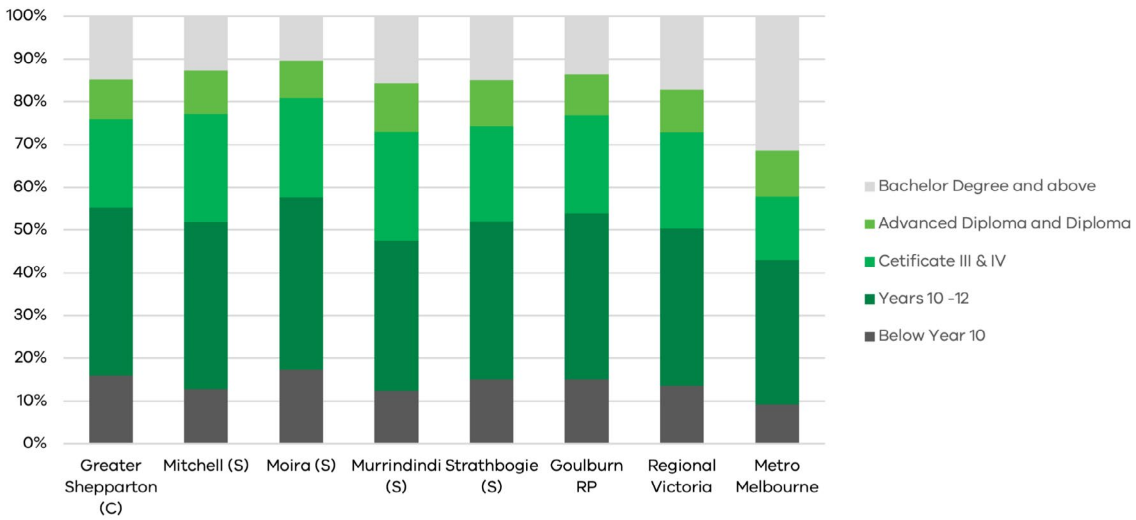
Educational attainment

Broadly speaking, educational attainment in Goulburn is slightly lower than regional averages. There are fewer people with bachelor's degree or higher qualifications and slightly more with a high school certificate as their highest level of education (see Figure 1.3.2).

Across LGAs, Moira has the lowest share of its population with a bachelor's degree or higher (10 per cent). All LGAs underperform the regional Victorian average (17 per cent) and Goulburn's average (13 per cent) is significantly lower than the metropolitan Melbourne average (31 per cent). This is likely to reflect the qualification levels required for many of the major employing industries in the region, namely Agriculture, Manufacturing and Construction and also the region's older demographic profiles.

Across LGAs, there are discrepancies in educational attainment. Murrindindi and, to a lesser extent, Strathbogie and Mitchell residents tend to have higher levels of attainment, while Moira and Greater Shepparton residents tend to have lower.

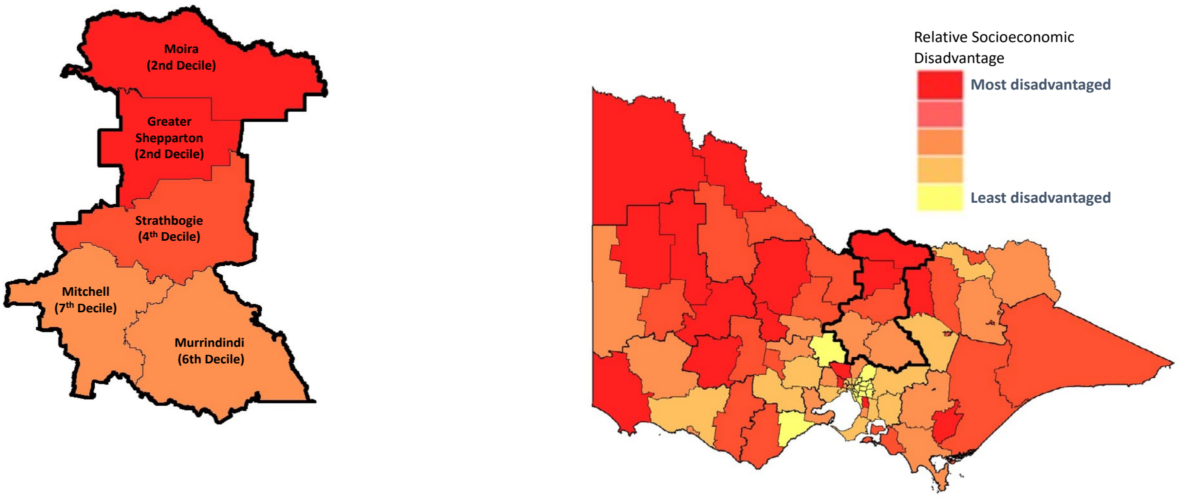
Figure 1.3.2: Educational Attainment (Highest Level)



Source: (ABS, 2016c)

Socio-economic Disadvantage

Map 1.3.3: 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 Goulburn. The shires bordering metropolitan Melbourne; Mitchell and Murrindindi, are the least disadvantaged LGAs in the region and are amongst the least disadvantaged in Victoria. Conversely, Greater Shepparton and Moira are among the most disadvantaged regions in the state, ranking 14 and 15 respectively out of Victoria's 80 LGAs and unincorporated areas in 2016.

Between 2011 and 2016, Greater Shepparton, Strathbogie and Mitchell all recorded small improvements in their relative level of disadvantage, while the Moira and Murrindindi remained stable (see Table 1.3.4).

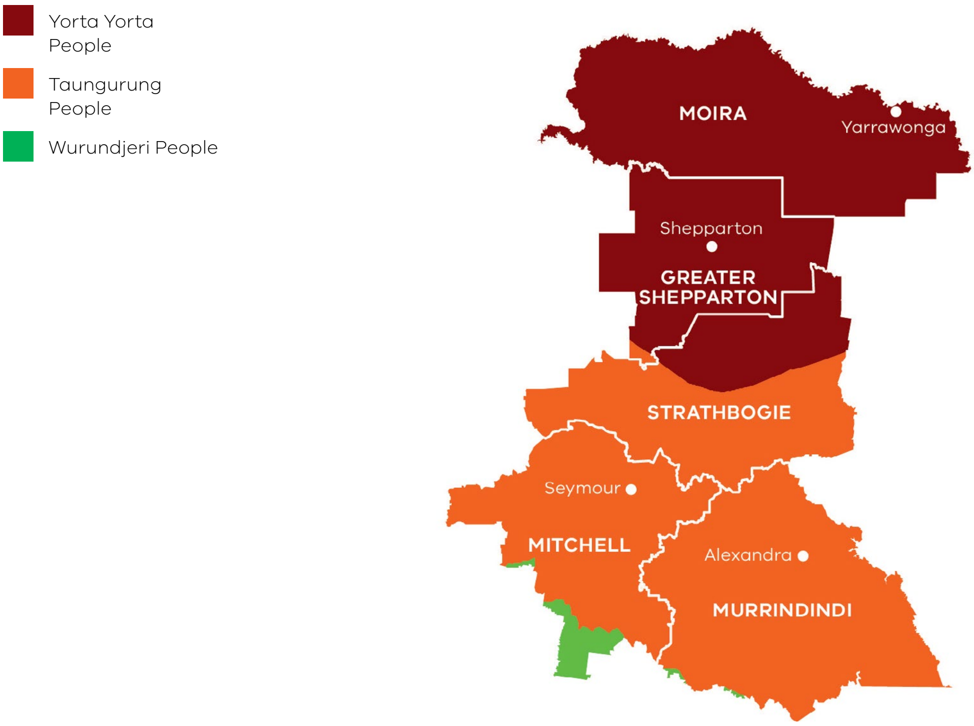
Table 1.3.4: LGA Relative IRSD Rankings (2011 and 2016)

Local Government Area	2016 Rank (of 79)	2016 Decile	2011 Rank (of 79)	2011 Decile	
Greater Shepparton (C)	14	2	13	2	▼
Moira (S)	15	2	15	2	=
Strathbogie (S)	26	4	23	3	▼
Murrindindi (S)	45	6	45	6	=
Mitchell (S)	47	6	43	6	▼

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

Aboriginal local communities and Traditional Owners

Figure 1.3.5: Illustrates the Traditional Owner Groups present in the Region.



(First Peoples State Relations, June 2021)

Aboriginal and Torres Strait Islanders[9]

Table 1.3.6 (below) indicates a range of measures which compares socio-economic outcomes for the Victorian population and for Victorian Aboriginal and Torres Strait Islanders. It shows that in each of the categories, the local Aboriginal and Torres Strait Islander population is more disadvantaged.

With a 15.4 per cent unemployment rate, Aboriginal and Torres Strait Islanders in Goulburn are almost three times as likely to be unemployed compared with the region's average (5.7 per cent).

The labour force participation rate among Aboriginal and Torres Strait Islanders (53.4 per cent) is almost 8 percentage points lower than average. Aboriginal and Torres Strait Islander households are also more likely to earn less than $650 per week (53.7 per cent) than average (41.6 per cent).

Furthermore, 25.4 per cent of Aboriginal and Torres Strait Islander youth in Goulburn are not engaged in work or study. This is significantly higher than the average rate of 11.9 per cent.

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

Table 1.3.6: Aboriginal and Torres Strait Islander Analysis

Category	Measure	Victoria		Regional Victoria		Metro Melbourne		Goulburn	
Economic performance	Labour force participation rate (%)	**64.5%**	■	**60.9%**	■	**65.8%**	■	**61.1%**	■
	Aboriginal and Torres Strait Islander Victorians	*57.8%*	■	*52.8%*	■	*62.4%*	■	*53.4%*	■
	Unemployment rate (%)	**6.6%**	▲	**5.9%**	▲	**6.8%**	▲	**5.7%**	■
	Aboriginal and Torres Strait Islander Victorians	*13.9%*	■	*16.5%*	■	*11.8%*	■	*15.4%*	■
Disadvantage and shared prosperity	Households earning less than $650 per week (2016 dollars) (%)	**34.8%**	▼	**43.1%**	▼	**31.8%**	▼	**42.9%**	■
	Aboriginal and Torres Strait Islander households	*47.7%*	▼	*56.6%*	▼	*39.2%*	▼	*53.7%*	■
	Children in jobless households (%)	**16.4%**	■	**16.5%**	■	**16.3%**	■	**18.2%**	▲
	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%**	▲	**24.8%**	▲
	Aboriginal and Torres Strait Islander Victorians	*19.9%*	▲	*19.5%*	▲	*20.3%*	▲	*17.1%*	■
Skills and education	People aged 15–24 not engaged in work or study (%)	**8.6%**	*	**11.3%**	*	**7.9%**	*	**11.49%**	*
	Aboriginal and Torres Strait Islander Victorians	*21.7%*	*	*25.0%*	*	*18.6%*	*	*25.4%*	*

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 uninstructive):

- 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

With 70 per cent of the region's workforce spread across seven industries, Goulburn's employment is relatively diverse. Despite the amount of significant employing industries, the region is specialised in Agriculture, Forestry and Fishing, and Electricity, Gas, Waste and Water Services.

- Over the past ten years, 14 industries have realised employment growth with Construction and Electricity, Gas, Waste and Water the fastest growing.

Across a range of employment measures, the region's performance is consistent with regional Victorian averages.

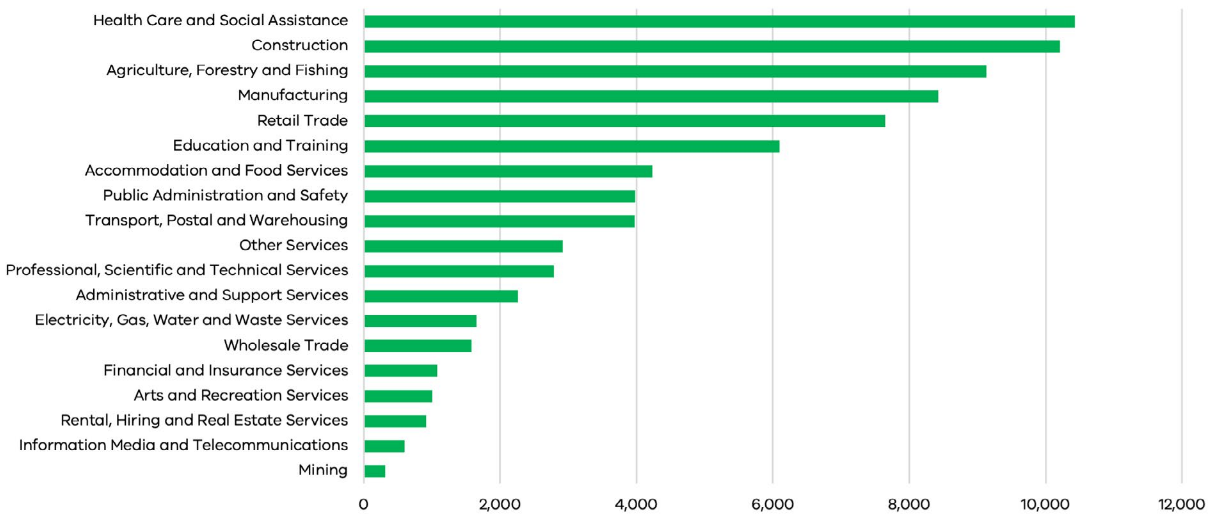
- Despite intra-regional disparities, Goulburn's unemployment rate has matched that of regional Victoria over the past ten years. Similarly, the region's labour participation and productivity, as well as part-time worker proportion are broadly commensurate with regional levels.

Across the region, local jobs tend to be filled by workers from within the municipality, but a significant number of workers commute within and beyond the region, particularly for the peri-urban Mitchell shire. In addition, the region experiences a seasonal inflow of agricultural workers to assist with harvesting.

Employment[10]

In 2020, there were 79,245 employed persons (see Figure 1.4.1) in Goulburn. Health Care and Social Assistance (10,428 workers) was the largest employing sector, followed by Construction (10,207 workers) and Agriculture, Forestry and Fishing (9,128 workers). The top seven employing industries account for just over 70 per cent of the region's workforce. Among subindustries, Agriculture is the largest employing, accounting for almost 11 per cent of the workers in the region and 94 per cent of workers in the Agriculture, Forestry and Fishing sector (see Figure 1.4.2).

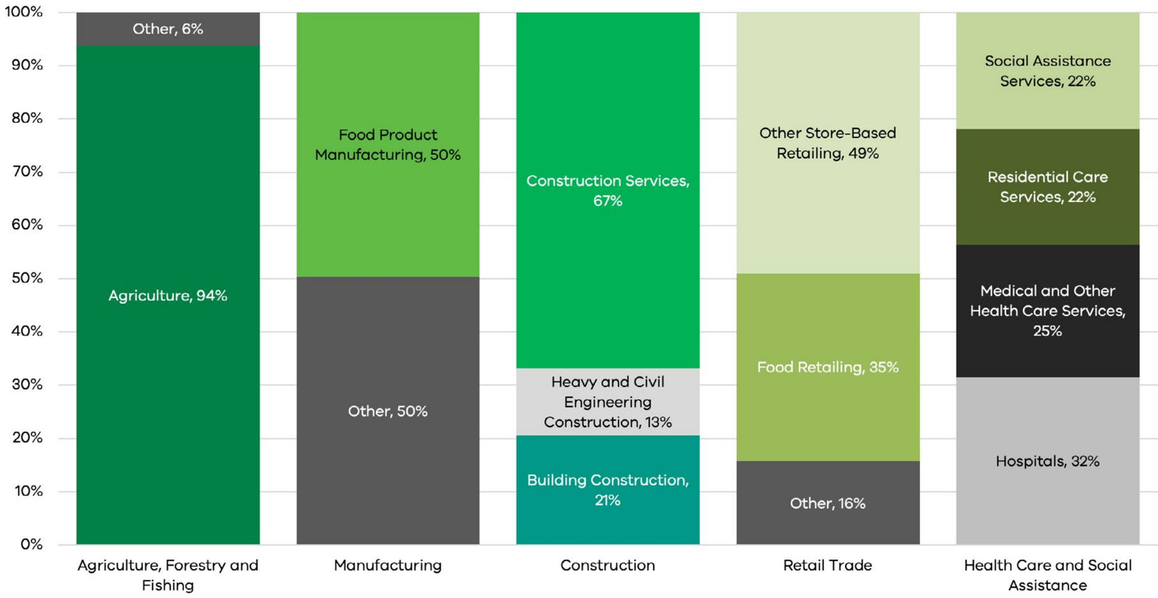
Figure 1.4.1: Employment by Industry



Source: (NIEIR, 2020)

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.

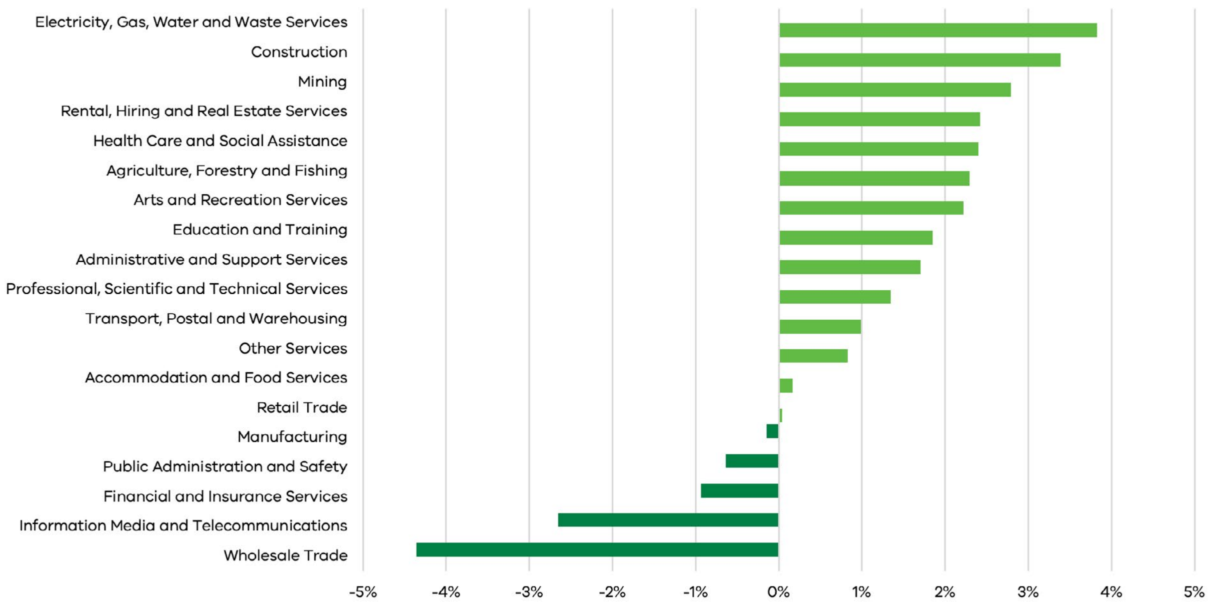
Figure 1.4.2: Subindustry Employment (Proportion of Top 5 Industries)



Source: (NIEIR, 2020)

Over the past ten years, employment grew by an average of 1.3 per cent per year. This exceeds the growth across regional Victoria (1.0 per cent) but lags metropolitan Melbourne (2.1 per cent). Among industries, only five have realised employment falls (see Figure 1.4.3).

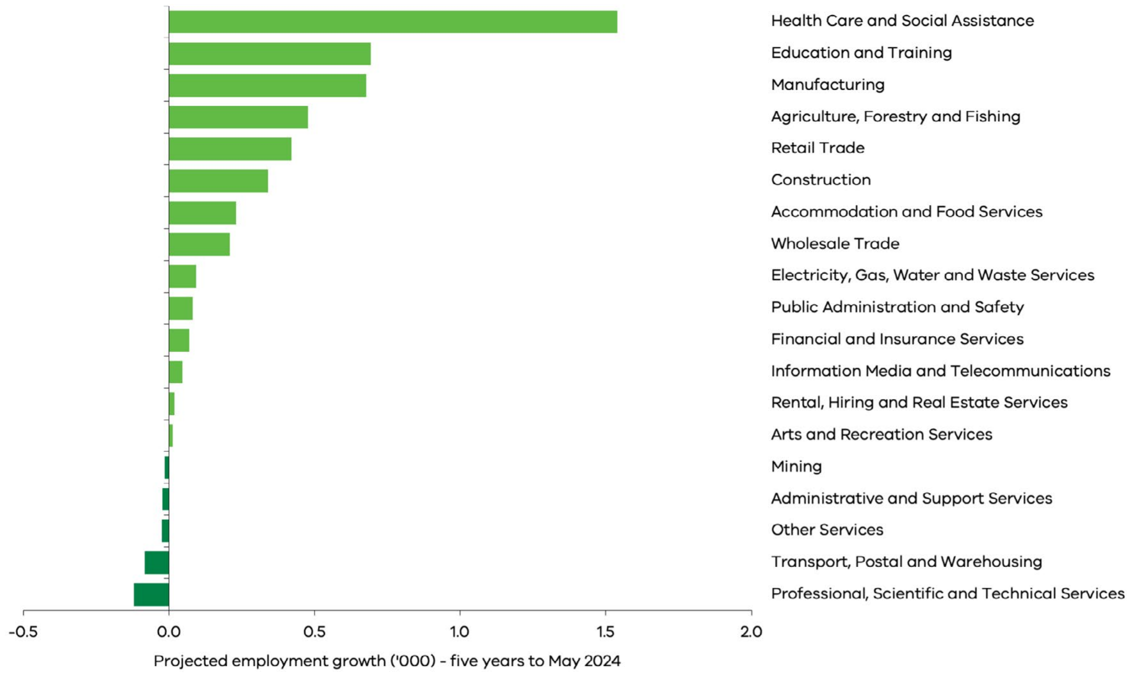
Figure 1.4.3: 10-year Average Annual Growth Rate (2011 – 2020)



Source: (NIEIR, 2020)

Pre-COVID employment projections (see Figure 1.4.4) forecast employment to increase by 7.3 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. The largest decline in employment was expected in Professional, Scientific and Technical Services. However, due to the significant disruptions caused by COVID-19, employment outcomes will now significantly differ from those previously forecast.

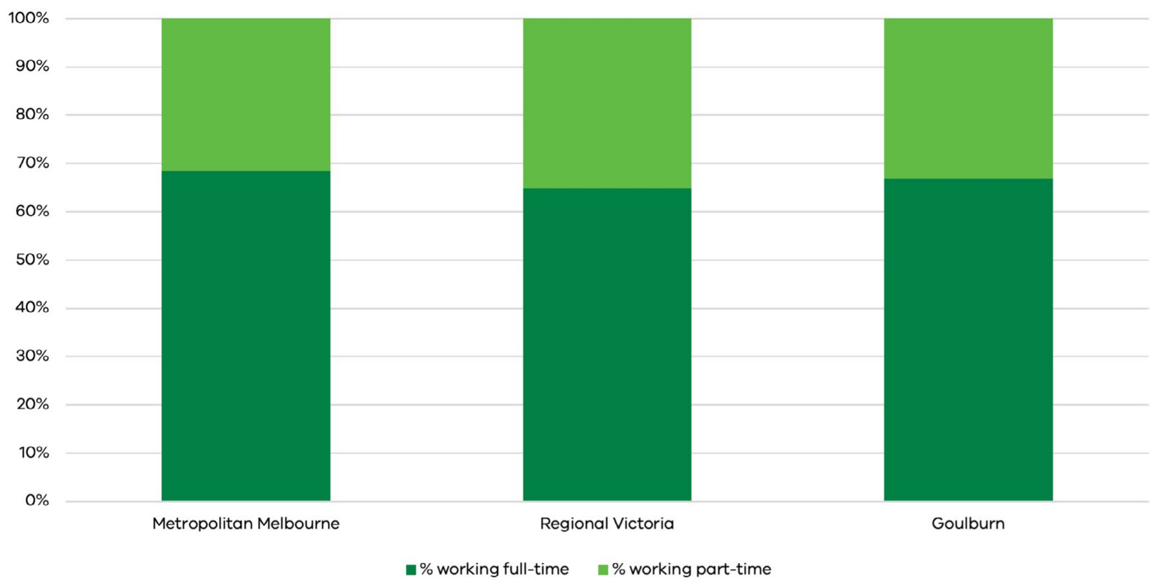
Figure 1.4.4: Projected change in employment ('000), Shepparton SA4, 2019-2024



Source: (National Skills Commission, 2020)

The Goulburn region has a higher share of the workforce employed in part time jobs than metropolitan Melbourne, but a lower share compared to regional Victoria. Of those employed in the region, 33 per cent of the workforce work part time, slightly lower than regional Victoria (35 per cent) and slightly higher than metropolitan Melbourne (32 per cent) (see Figure 1.4.5).

Figure 1.4.5: Composition of Employment (2020)



Source: (NIEIR, 2020)

Unemployment rate

Over the past ten years, the unemployment rate in the Goulburn has been considerably more volatile than that of regional Victoria and metropolitan Melbourne (see Figure 1.4.6).

Prior to the onset of the COVID pandemic (March quarter 2020), the unemployment rate in the region was 4.8 per cent. This was above the unemployment rate in 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 5.8 per cent; above that of regional Victoria (5.3 per cent) and equal to metropolitan Melbourne (5.8 per cent).

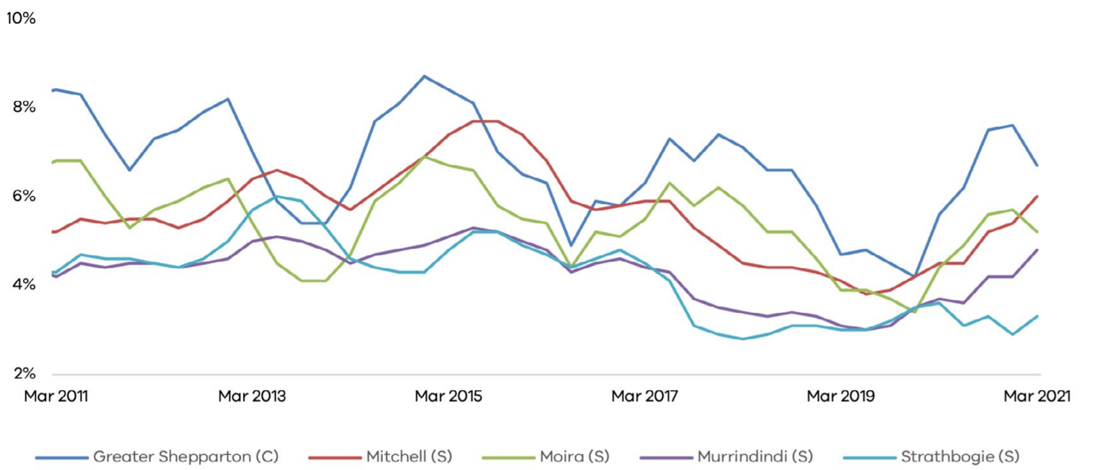
Unemployment rate estimates since COVID have seen the unemployment rate in the region rise to 5.8%, well above the regional average.

Unemployment rate in the region is varied between LGAs. Greater Shepparton has the highest unemployment rate, and Strathbogie has the lowest.

Figure 1.4.6: Unemployment Rate (2011 – 2020)

Source: (National Skills Commission, 2021)

Figure 1.4.7: Unemployment Rate, Goulburn LGAs



Source: (National Skills Commission, 2021)

Participation rate

The labour force participation rate in Goulburn (61.1 per cent) is slightly higher than regional Victoria (60.9 per cent) and below metropolitan Melbourne (65.8 per cent) (see Figure 1.4.8). This slight difference is highlighted in the breakdown of the participation rate by age; Goulburn's rate closely aligns with the regional Victorian average across all age groups excluding the youngest and oldest cohorts (see Figure 1.4.9).

Figure 1.4.8: Participation Rate (2016)

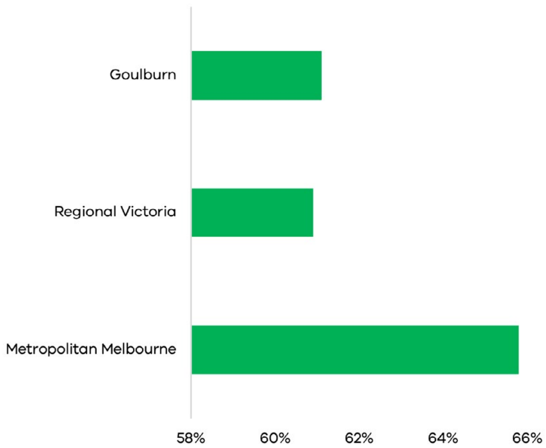
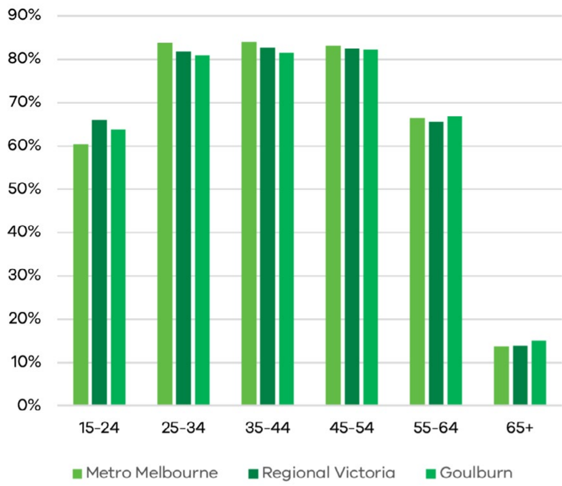


Figure 1.4.9: Participation Rate Age Comparison

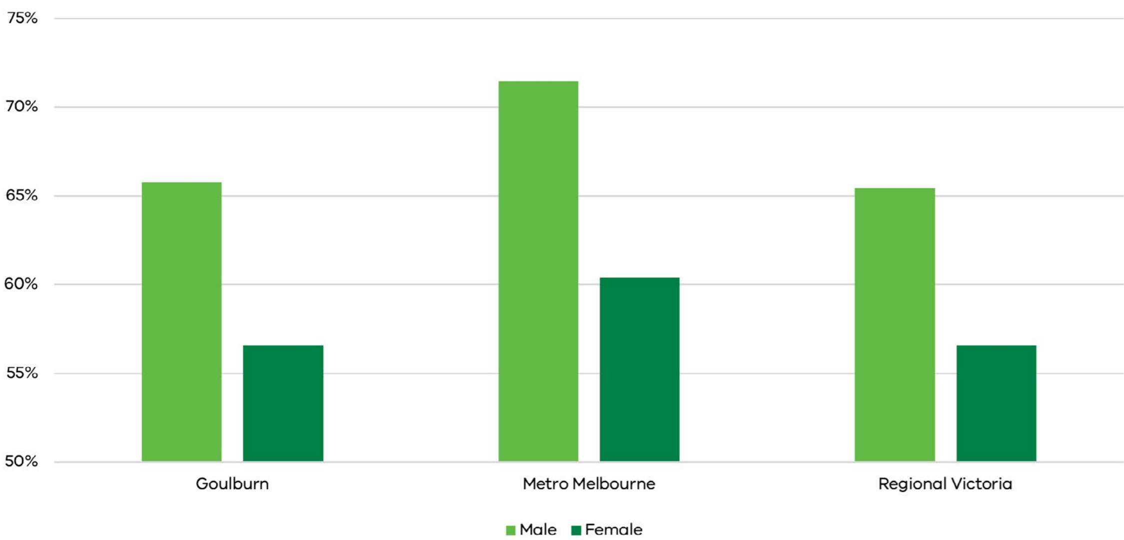


Source: (ABS Census, 2016)

The female labour force participation rate in Goulburn (56.6 per cent) is significantly lower than the male participation rate (66.0 per cent), which is consistent with both regional Victoria and metropolitan Melbourne.

This presents an opportunity to boost future economic growth if participation rates among women could be lifted and employment opportunities found (see Figure 1.4.10).

Figure 1.4.10: Participation Rate by Gender (2016)



Source: (ABS Census, 2016)

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

Since 2001, labour productivity in the Goulburn region has declined from $133,000 GRP per worker to $117,000 GRP per worker. This trend is broadly consistent with the decline in productivity realised across regional Victoria, but contrary to the steady increase realised in metropolitan Melbourne (see Figure 1.4.11).

Across LGAs, labour productivity differs significantly. In 2020, Strathbogie had the lowest labour productivity. After a decline on labour productivity since 2015 in Moira Shire, Mitchell overtook it as the most productive shire in 2020. Mitchell has seen growth since 2017. Furthermore, while Greater Shepparton and Mitchell have seen relatively stable productivity levels, Strathbogie and Murrindindi have experienced a significant shifts (for Murrindindi, from the highs realised in the early 2000s to lows in 2008). (see Figure 1.4.12).

Figure 1.4.11: GRP per worker

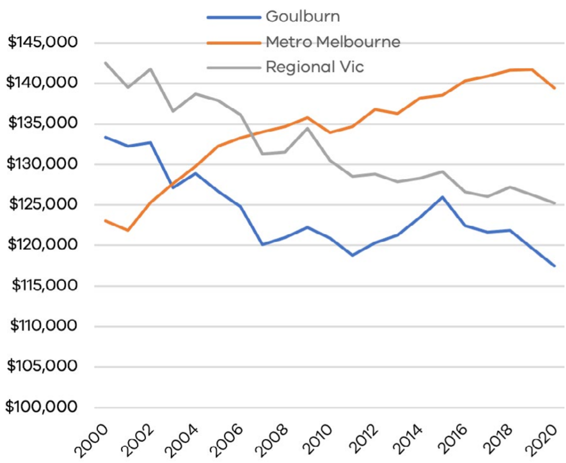
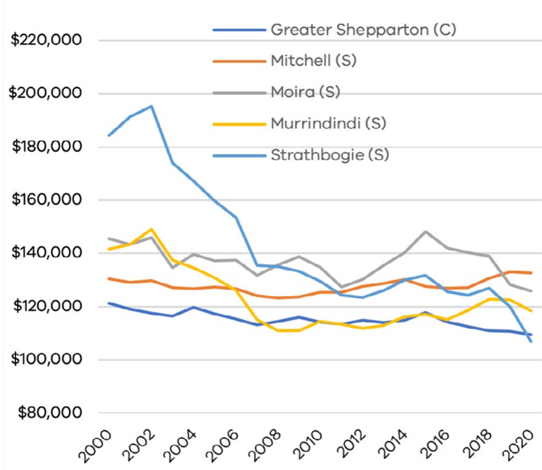


Figure 1.4.12: GRP per worker by LGA



(NIEIR, 2019)

Worker mobility and commuting across regions

An analysis of journey-to-work patterns between Goulburn's LGAs indicates varied levels of commuter movement (see Tables 1.4.13 and 1.4.14). Greater Shepparton has the largest proportion of local jobs filled by residents (85 per cent) (employment self-sufficiency). In comparison, 75 per cent of jobs in Mitchell Shire are filled by residents.

Consequently, there are also variations in the proportion of workers who work within their LGA of residence (employment self-containment).

Among LGAs, 91 per cent of employed residents in Greater Shepparton work in the LGA. In contrast, only 47 per cent of employed Mitchell residents work within the municipality, with a large number of residents commuting into metropolitan Melbourne for work.

Table 1.4.13: Labour mobility

	Greater Shepparton (C)	Mitchell (S)	Moira (S)	Murrindindi (S)	Strathbogie (S)
Total local workers (working anywhere) (UR)	26,976	18,404	11,807	5,951	4,375
Number of jobs in local area (POW)	28,026	10,866	10,533	4,117	3,521
Number of local jobs held by locals	23,887	8,150	8,368	3,377	2,730
Number of locals employed outside LGA	2,225	9,042	3,020	2,115	1,421
Employment Self containment	91%	47%	73%	61%	66%
Employment Self Sufficiency	85%	75%	80%	82%	78%

Source ABS, Census 2016

Table 1.4.14: Labour mobility across LGAs

Place of work → Place of residence ↓	Greater Shepparton (C)	Mitchell (S)	Moira (S)	Murrindindi (S)	Strathbogie (S)	Outside Goulburn
Greater Shepparton (C)	23,887	72	573	5	152	1,423
Mitchell (S)	89	8,150	4	77	245	8,627
Moira (S)	1,277	8	8,368	0	12	1,723
Murrindindi (S)	14	177	0	3,377	32	1,892
Strathbogie (S)	518	396	6	18	2,730	483
Outside Goulburn	2,220	2,042	1,573	637	350	

Source: (ABS Census, 2016)

Note: Employment Self-Containment indicates the proportion of employed residents who are employed within the boundaries of the LGA. Employment Self-Sufficiency indicates the proportion of local jobs that are filled by local residents for an LGA.

UR: Usual residents

POW: Place of work

1.5 Skills

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

- The number of skilled workers in Goulburn is growing faster than regional averages, but marginally slower than that of metropolitan Melbourne. As such, the region's relative levels of disadvantage may shift over time.

Occupation

In 2021, 42,700 workers in Goulburn worked in skilled occupations (61.6 per cent of the local workforce). As a proportion of the total workforce, Goulburn has a similar share of skilled workers as regional Victoria (62.2 per cent) but lags metropolitan Melbourne (67.3 per cent).

In the five years to 2021, the number of skilled workers increased by 3,100 workers (8.0 per cent), while the number of low skilled workers decreased by 1,800 workers (6.2 per cent). The rising number of skilled workers is consistent with trends across regional Victoria and metropolitan Melbourne, where employment among skilled workers grew by 8.8 per cent and 22.1 per cent respectively.

Livestock Farmers was the largest employing occupation in the region, followed by Sales Assistants (general) and Registered Nurses. In the five years to 2021, seven of the top ten employing occupations experienced an increase in total number of workers. Six of the top ten are skilled professions, with Primary School Teachers, Registered Nurses and Livestock Farmers realising the most significant growth over the period.

Beyond specific occupations, Northern Victoria (which comprises much of the Goulburn region) ranks second lowest in the state in basic digital skills (Telstra, 2020). As industries increasingly utilise technology to realise productivity gains, workers are required to continuously upskill. These enabling skills have become vital for workers to enhance their employability and to keep pace with the rate of socio-economic change occurring across the state.

Table 1.5.1: Top 10 employing occupations

Goulburn	2021	2016	Change	Skill level*[11]
Livestock Farmers	4,300	4,000	300	Skilled
Sales Assistants (General)	3,700	3,900	-200	Low Skilled
Registered Nurses	2,000	1,700	300	Skilled
Primary School Teachers	1,700	1,300	500	Skilled
Retail Managers	1,700	1,400	300	Skilled
Secondary School Teachers	1,700	1,300	400	Skilled
Crop Farmers	1,700	1,600	100	Skilled
General Clerks	1,600	1,600	0	Low Skilled
Truck Drivers	1,600	1,700	-100	Low Skilled
Receptionists	1,300	1,300	0	Low Skilled

Note Change may appear different due to rounding. (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 high levels of employment and GVA specialisation, and business clustering, the region has a strong advantage in Agriculture, Forestry and Fishing alongside strength across a breadth of other industries. This suggests the region has many local factors which may lead to additional 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 (Goulburn Industry Profile 2019) found the region has considerable endowments across a range of attributes:

2.1 Transport Infrastructure

Goulburn is located to the north-north east of Melbourne and is a thoroughfare which links the state's urban hub with New South Wales and Canberra. The region is well connected via road and rail, and the region's major population hubs are generally well connected and proximate (within 100km of each other) (see Figure 1.6.1). Road and rail links are important for enabling economic activity to occur between states and allows the region to access international markets.

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

- the Hume Freeway which connects Melbourne to Canberra and Sydney,
- the Goulburn Valley Freeway which connects Eildon, Yea, Seymour, Shepparton and Strathmerton,
- the Murray Valley Highway which connects Towong, Wodonga, Yarrawonga, Cobram Echuca through to Swan Hill,
- the Midland Highway which connects Shepparton to other regional centres including Geelong, Ballarat and Bendigo, and
- the Maroondah and Melba Highways which further connects the region to Melbourne.

The region also has significant rail infrastructure which includes an increasing number of daily direct passenger routes to Melbourne and Sydney via Shepparton and freight connections route through Tocumwal, Shepparton and the North East Line which links Melbourne to Sydney. The rail and road freight access to Melbourne and Geelong is important as it provides same day access to the Port of Melbourne and Geelong Port.

The Goulburn region does not have a major airport however does have several smaller airports such as Mangalore. The northern parts of the region are close to Albury Airport, while the region's southern parts which border metropolitan Melbourne have easy access to Avalon and Tullamarine.

Figure 2.1.1: Transport Connections, Goulburn

Source: (Infrastructure Victoria, 2019)

2.2 Digital Infrastructure[12]

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 Moira and Strathbogie scoring lowest, while Mitchell scored highest.

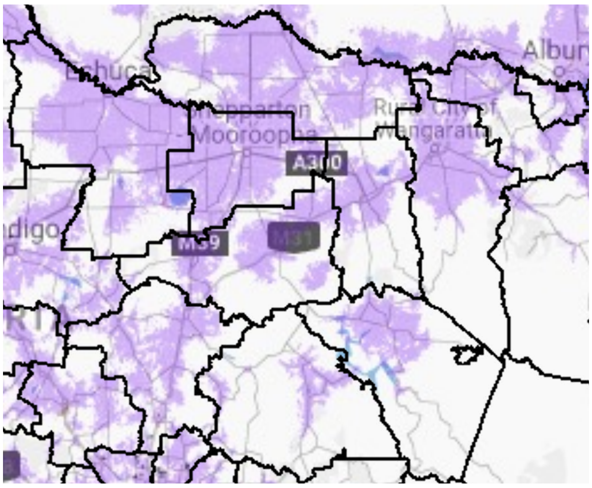
Table 2.2.1: ADII score comparison 2021, VIC

Local Government Area	Score
Greater Shepparton	66.0
Mitchell	70.0
Moira	63.0
Murrindindi	65.0
Strathbogie	63.0
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, Goulburn



(NBNco, 2020)

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

- An increased need for better home connectivity to support remote work, learning and tele health.
- A need for connectivity during natural disasters and emergencies — especially during bushfires.
- Competitive internet speeds are needed to attract businesses, new residents, and tourism from major cities.
- Growth in sophisticated agricultural technology like Internet of Things requires better mobile/broadband connectivity.

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 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

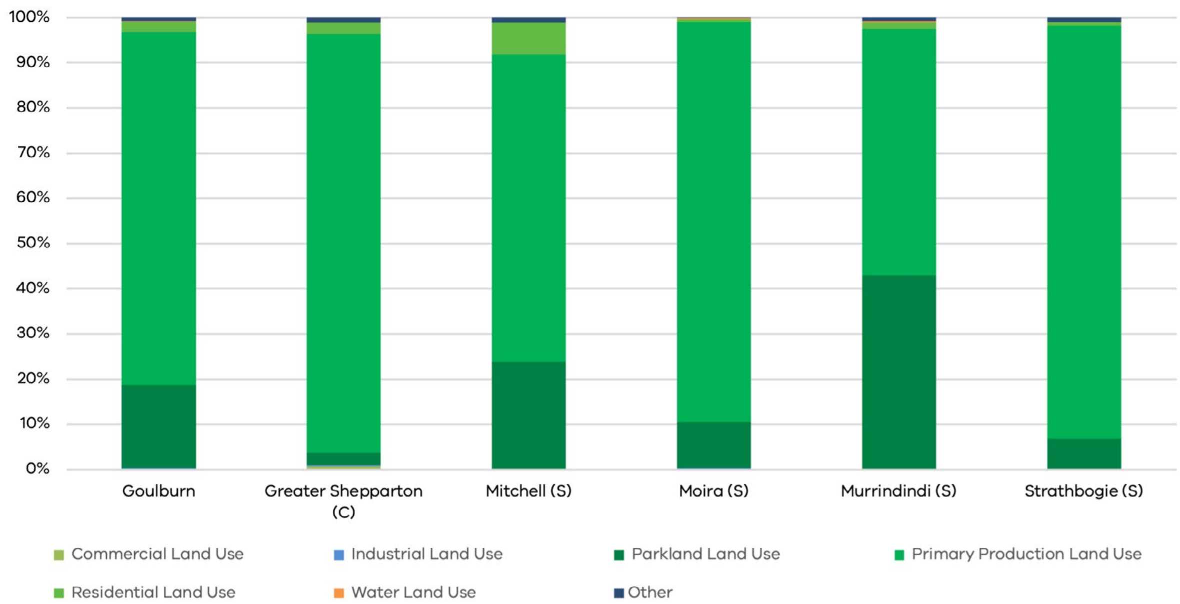
	Fixed broadband access	Mobile access
Cities and large towns, such as Yarrawonga/ Mulwala	Generally comparable to metropolitan Melbourne with some access to FTTP and widespread provision of FTTN within town centres, but fixed wireless and satellite serving the town fringe and beyond	Generally comparable 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 Murchison and Pyalong	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 fruit horticulture south of Cobram	Lower capacity fixed broadband technologies like fixed wireless and satellite available due to remoteness and topographical elevation of certain 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 Lake Eildon and Murray River	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, with service quality and reliability compromised on smaller roads and in more remote areas

(Infrastructure Victoria, 2019)

2.3
Natural Endowments

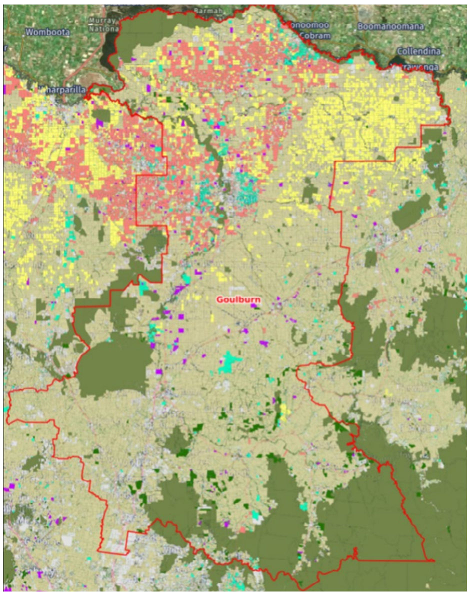
Figures 2.3.1 and 2.3.2 indicate the land use in Goulburn and its constituent LGAs. Land use in the region varies by LGA, however most land is used for primary production (78%). The north west has significant dairy land use while the north east is more concentrated in cropping land. Central areas are predominantly grazing sheep and beef. The second most common use of land is for parkland (18%). This is predominantly concentrated in the region's south east corner. Meanwhile, the region's southern border is urbanised which is expected to grow as the Melbourne urban fringe extends. This situation may lead to contested land use between agricultural uses and residential / industrial use.

Figure 2.3.1: Land Use by LGA, Goulburn



Source: (ABS, 2017)

Figure 2.3.2: Spatial Map of Land Use



Urban	Croppong	Dairy	Private forestry	Grazing sheep & beef	Horticulture	Other livestock	Public

(Agriculture Victoria , 2020) (Based on 2016 data)

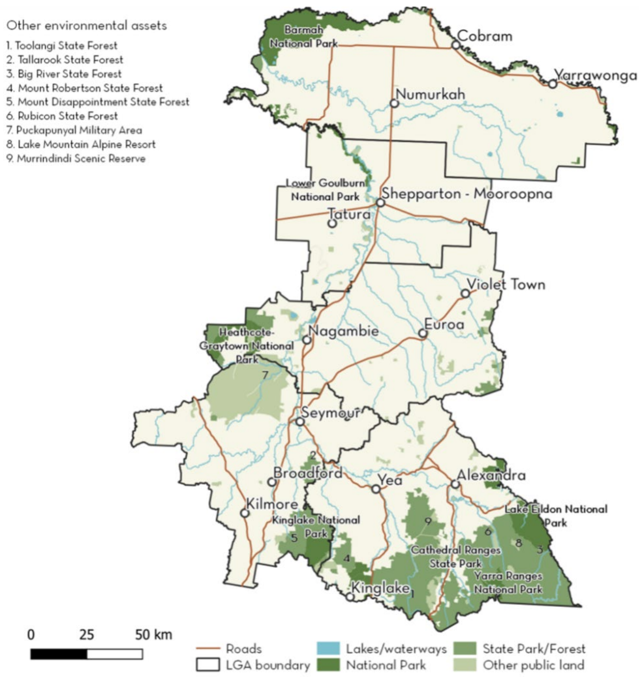
Environmental Assets

18 per cent of the Goulburn region is parkland. These are outlined in table 2.3.3 and visualised in figure 2.3.4. A significant proportion of these areas are concentrated in Murridindi Shire, which is home to the Lake Eildon National Park, part of the Yarra Ranges National Park and the Cathedral Ranges State Park. Meanwhile, Kinglake National Park is located in Mitchell Shire, Heathcote-Gratown National Park in Strathbogie and Barmah National Park in Moira Shire. The region is also home to the Victorian Fishing Authority's Snobs Creek Hatchery which has produced and grown fish for recreational fisheries and conservation stockings for more than 70 years. The hatchery produces trout, salmon and native fish and is responsible for their release into Victorian waterways.

Table 2.3.3: Key Environmental Assets, Goulburn

National Parks	State Forest and State Parks	Other
• Barmah National Park	• Cathedral Ranges State Park	• Puckapunyal Military Area (on the Commonwealth Heritage List)
• Kinglake National Park	• Toolangi State Forest	• Lake Mountain Alpine Resort
• Heathcote-Graytown National Park	• Tallarook State Forest	• Murrindindi Scenic Reserve.
• Lake Eildon National Park	• Big River State Forest	• Lake Mountain cascades MTB trail
• part of the Yarra Ranges National Park.	• Black Range State Forest	• Buxton MTB Park
	• Mt. Robertson State Forest	• Snobs Creek fish hatchery (Fisheries- breeds fish for statewide fish stocking)
	• Mt. Disappointment State Forest Rubicon State Forest.	• Broadford State Motorsport Complex

Figure 2.3.4: Key Environmental Assets, Goulburn



Source: (Infrastructure Victoria, 2019)

Mineral resources and forestry

Traditionally, the principal mineral resources in the Goulburn region has been sand and stone, which supports cost effective construction. However, future mining opportunities may exist for gold, precious metals, base metals, brown coal and molybdenum (Infrastructure Victoria, 2019).

The Goulburn region supports a number of state forest reserves in the southern part of the region, which supports forestry and timber production (State Government of Victoria, 2014). The Mountain Ash and Alpine Ash forests in the region are high quality and the harvested logs are transported to mills in Benalla, the Yarra Valley and Heyfield for conversion into high-value appearance grade products including furniture, flooring, staircases and window frames. Poorer quality logs are used for the production of fence posts, garden stakes, equestrian equipment and fencing as well as high-quality paper products at the Maryvale mill in the Latrobe Valley.

The southern part of the region also contains a number of pine plantations.

In November 2019 the Victorian Government announced the Victorian Forestry Plan which plans for a transition from native forest harvesting to a wholly plantation-based supply from 2030.

The Plan aims to maintain productive and sustainable communities and includes support for workers, businesses and communities throughout the transition period. These include grants for businesses to transition to plantation timber, support for large-scale plantation development and funds to grow other businesses and create jobs.

Renewable energy

There is a degree of hydropower production and strong uptake of rooftop solar in the region.

Hydropower is generated at Eildon Power Station (120MW), located on the banks of lake Eildon on the border of Mansfield and Murrindindi Shire, as well as at Rubicon hydro scheme (13.5MW) and Yarrawonga (9.5MW). Seymour has 57.6MW Wind Power generation at Cherry Tree Hill and Moira Shire hosts a 128MW solar farm in Numurkah. There are also smaller scale bio-gas generators at Tatura and Shepparton. (DELWP, 2019)

The uptake of renewable energy has been driven at the local level by a large number of small community energy groups, including in Euroa, Shepparton, Seymour and Alexandra. Community renewable energy projects are owned and run by local communities. Community energy projects are diverse and can include solar panels or hot water bulk buys, micro or mini grids, community-owned solar or wind farms or electricity retailers (DELWP, 2019).

There are several opportunities for renewable energy development in areas that are close to existing distribution infrastructure. Hume has two main high voltage transmission lines – a 220kV line from Shepparton to Wodonga via Glenrowan and Dederang, and a 330kV from South Morang on Melbourne's outskirts to Dederang and to New South Wales – and numerous 66kV sub-transmission lines. There are also five major electrical terminal stations in the region at Shepparton, Glenrowan, Dederang, Mt Beauty and Wodonga (DELWP, 2019).

This infrastructure is currently supporting renewables and is expected to support potential opportunities including solar energy production, bioenergy and biofuel generation from waste products and further hydro-electricity associated with water resources (DELWP, 2019).

03
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04
Strategic context

Goulburn Regional Economic Development Strategy

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

At the time of drafting, the following groups did not have an up-to-date strategy or plan with regional economic development outcomes available: Strathbogie Shire and Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation

Table 4.1.1: Strategic context

Goulburn Murray Resilience Strategy 2020		
Purpose	Responds to the macro drivers of change in the region—including increasing global uncertainty, the effects of climate change and industry transition—to set a vision and strategy for the region	
Identified priorities	• Futures of agriculture • Learning for change • Circular economy • Natural and build assets • Leadership and coordination	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
	✓	**Renewable energy**
	✓	**Shepparton as the regional capital**

Goulburn Murray Prosperity Plan 2021		
Purpose	Sets out a place-based vision to generate an additional $150 million Gross Regional Product per annum by 2036 for the region through the economic inclusion, prosperity and shared value of Yorta Yorta and First Nations people	
Identified priorities	• A thriving community with strong foundations • Skills and pathways for the future • Building enduring relationships • Accelerating enterprise and leadership development • Goulburn Murray as a region of the Future • Opportunities through culture and shared value	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✓	**Visitor economy**
	✓	**Renewable energy**
		Shepparton as the regional capital

Hume Regional Renewable Energy Roadmap 2019		
Purpose	Outlines what a future sustainable renewable energy landscape could look like for the region and identifies some of the area's key opportunities	
Identified priorities	• Transmission infrastructure • Distributed energy resources • Pumped hydro energy storage • Large scale solar • Bioenergy • Emerging technologies	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
		Visitor economy
	✓	**Renewable energy**
		Shepparton as the regional capital

Goulburn Regional Digital Plan 2019		
Purpose	Identifies gaps and opportunities across the region's digital landscape and makes recommendations to address gaps and to realise the region's full digital potential	
Identified priorities	• Addressing digital coverage gaps • Encourage digital update • Building digital capability and skills	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Goulburn Regional Partnership Outcomes Roadmap 2019		
Purpose	Outlines the long-term outcomes and the challenges associated with achieving them	
Identified priorities	• Population wellbeing • Education and employment • Reducing disadvantage • Growth corridor • Economic development	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
		Visitor economy
		Renewable energy
		Shepparton as the regional capital

Hume Regional Growth Plan (Vic Gov) 2014		
Purpose	Provides a regional approach to land use planning in the Hume region to ensure growth and change is managed to capitalise on the Hume Region's competitive advantages and strengths	
Identified priorities	• Efficient and sustainable settlements • Healthy, vibrant, resilient communities • A mobile and connected region • A thriving and dynamic economy • Sustainable rural areas • A health environment and a celebrated heritage	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
	✓	**Renewable energy**
	✓	**Shepparton as the regional capital**

Greater Shepparton Economic Development Tourism and Major Events Strategy 2017-21 2017		
Purpose	Identifies opportunities to build and diversify the local economy, assist in building Council's event portfolio and boost tourism within the region	
Identified priorities	• Increase export opportunities in the food industry sector • Attract and retain capable workforces through enhanced liveability and training pathways • Strengthen the role of the Shepparton CBD as the premier service centre in central Victoria • Improve the economic diversity through embracing growth sectors and niche opportunities • Strengthen the visitor economy	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
	✓	**Renewable energy**
	✓	**Shepparton as the regional capital**

Moira Economic Development Strategy 2019		
Purpose	Provides a roadmap for growing opportunities across the Moira Shire	
Identified priorities	• Enhance infrastructure and land use • Provide information, learning and networking • Encourage growth, innovation and diversification • Foster the visitor economy • Make great places for great people	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Mitchell Shire Economic Development Strategy 2016-21 2016		
Purpose	Provides a strategic direction and economic framework to strengthen and build resilience, support business growth, encourage investment and job creation and improve liveability	
Identified priorities	• Seymour as a thriving major regional central • Wallan and Beveridge as attractive growth areas • Kilmore as a key service centre • Broadford as a country town with rural appeal • Promote and build on the smaller townships' attractive lifestyle opportunities for niche and localised economic activity • Retain economically productive rural areas	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Yorta Yorta Nation Strategic Plan 2019		
Purpose	Part of the annual report and outlines the future aspirations of the Yorta Yorta Nation	
Identified priorities	• To assert cultural authority over our country and gain greater autonomy and independence • To empower our family groups to be strong in our identity and to determine their own futures • To safeguard and promote our cultural knowledge and intellectual property • To continue to build a sustainable organisation that reflects the aspirations of our people	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
		Visitor economy
		Renewable energy
		Shepparton as the regional capital

Taungurung Land and Waters Council Aboriginal Corporation Strategic Plan 2016–20		
Purpose	One-pager laying out the vision, values, objectives, key strategies and indicators of success for the Taungurung Traditional Owners	
Identified priorities	• Vision: Protecting our rights; Building our future • Values: Celebrating Taungurung identity, engaging with respect, influencing with integrity, driving change through leadership • Objectives: Supporting our mob, progressing our interests, growing our business, implementing our agreement	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
		Visitor economy
		Renewable energy
		Shepparton as the regional capital

Taungurung Land and Waters Council Aboriginal Corporation Country Plan		
Purpose	The Country Plan provides an outline of Taungurung Country, Culture and People, and communicates Taungurung vision and aspirations	
Identified priorities	• Identity, recognition and rights • Health and wellbeing • Cultural heritage • Taungurung traditional knowledge • Caring for our Country • Economic independence (focus on self-determination, business growth in areas of expertise, securing rights to natural resources)	
Influence on the REDS strategic directions	✓	**Agriculture and manufacturing**
	✓	**Visitor economy**
	✓	**Renewable energy**
		Shepparton as the regional capital

Murray Region Destination Management Plan Murray Regional Tourism		
Purpose	Provides a strategic approach to prioritising key tourism experiences and product development, and ensure continued sustainable growth of the visitor economy	
Identified priorities	• The river • Nature-based tourism • Sport and recreation • Food, drink and agribusiness • Arts, heritage and culture • Festivals, events and conferences • Accommodation • Infrastructure, transport and servicing	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Murray River Tourism Strategic Plan 2021–24		
Purpose		
Identified priorities	• Regional marketing: Lead and support the Murray region in the development of collaborative marketing programs • Product development: Facilitate investment in infrastructure, new products and experiences that revitalise the region's tourism offer • Leadership and advocacy: Leading the growth and development of the Murray region through expert knowledge, advocacy and industry engagement • Industry development: Improve the quality of tourism experiences in the region through industry education and support • Governance and sustainability: A sustainable, transparent and effective organisation focused on making a difference	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Tourism North East Three-year strategy 2019/20–2021/22		
Purpose	Provides focus for tourism efforts	
Identified priorities	• Australia's premier bike destination • Innovation in food and drink • Evolve the winter offering • Nature-based tourism experiences • Establish arts and culture credentials • Set industry best practice for the use of digital technologies	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✔	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Activating Lake Eildon; Lake Eildon Masterplan Tourism North East 2020		
Purpose	Establishes a shared vision for the activation of Lake Eildon, identifying priority tourism and recreation developments with an environmentally sustainable framework that optimise economic outcomes for the region	
Identified priorities	• Improve the experience for existing visitor markets • New products to reach target markets • Investment in enabling infrastructure • Improved destination management	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✔	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Murrindindi Shire Tourism and Events Strategy 2019-25 2019		
Purpose	Guides the deliver of all tourism and events activities in the area, providing the opportunity for a long-term plan and vision for Murrindindi Shire which will strengthen the role of tourism in the region's economy	
Identified priorities	• Deliver a streamlined approach to tourism industry governance • Deliver streamlined and effective marketing and visitor information services • Develop product strengths and invest in emerging opportunities and supporting infrastructure • Drive tourism growth to Murrindindi though an enhanced events calendar	
Influence on the REDS strategic directions		**Agriculture and manufacturing**
	✓	**Visitor economy**
		Renewable energy
		Shepparton as the regional capital

Contact us

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